



CHRISTIAN HEALTH ASSOCIATION SIERRA LEONE
STANDARD OPERATING PROCEDURE (SOP) FOR KEEPING RECORDS
REVISED AND ADOPTED ON THE 30TH NOVEMBER, 2025

1. Objective

This Standard Operating Procedure (SOP) shall ensure that all relevant records are easily accessible to staff that require them and that no records are lost or impossible to locate by staff.

1. Area of Application and Responsibilities

This SOP applies to all departments and all operations that generate records relating to Medicines Supply Unit (MSU). All staff are responsible to file the records they handle and generate.

2. Implementation

2.1. Physical Records

Every department keeps an archive of physical records.

2.1.1. General Requirements Physical Records

The archive is structured in a way that makes it easy to locate documents. This means

- Records are sorted by category or topic
- In alphabetical or chronological order
- In clearly labeled box folders

Folder names are

- Consistent and not ambiguous
- Dated:

If a folder is full, a new folder is opened with the same label and the date it was established. The old folder is labeled with the date of the last document filed inside.

2.1.2. Mandatory filing

Permanent filing is done in box folders or books. The temporary files can be kept in manila folders. Below is a list of mandatory box folders/books for record keeping. Other SOPs may

Permanent filing - Sales, Inventory, Operational Cost			
No	Folder name	For which docs	
1	Invoices	INVs RCPTs, Deposit Slips CNs Tally INV + CN + RCPT Summary reports	Filed by month
2	Receivables	INVs not settled yet After the customer pays, move to reg. invoice folder	Filed by month
3	Physical Inventory	Inventory report hard copies Physical Stock Vouchers Summary Report Physical Stock Vouchers	Filed by month
4	Finished Inventory Control Card	All Inventory Control Cards with balance 0	Filed alphabetically
5	Expired Inventory Control cards	All expired Inventory Control Cards monthly summary report	Filed alphabetically
6	Temperature Monitoring	Daily temperature entries	Book instead of box folder
8	Cleaning records	Weekly/bi-weekly record that cleaning was conducted	Book instead of box folder
7	Liquidations	All liquidations of MSU funds supporting docs	Filed by month
8	Donations	Donation request forms donation INV (copies)	Filed by month
9	Medicines Procurement	All hard copy documents relating to procurement of medicines: - Supplier invoices - Reception reports - Bill of Lading, etc.	Filed by order to supplier
10	Supplier qualification	Supplier warehouse inspection checklist Supplier questionnaires Supporting docs from suppliers (product Registration certificate etc) Qualification letter	Filed by supplier

specify additional documents for filing.

temporary filing			
no	folder name	for which docs	move to permanent filing when:
A	to be entered into Tally	INV raised outside of Tally, because Tally was down	INV entered in Tally
B	to be entered into donations report	INV for donations	donations entered into monthly donated items report
C	to be entered into service level report	requisition lists from customers	when entered into monthly service level report

2.1.3. Retention of Physical Records

Documents are retained for a minimum of 10 years unless otherwise specified in an applicable SOP.

2.1.4. Access to Physical Records

All staff that require access to certain archived documents are granted access. SOPs and/or department heads decide whether a document should be classified and not made accessible to all staff. Classified documents are filed using the same structure as non-classified documents. Folders should not contain classified and unclassified documents at the same time. Folders with classified documents are kept physically apart from the other records, assuring that only staff with the required clearance have access.

Non-classified documents should be accessible to all staff in a centralized archive (or several centralized archives for each department). Staff do not keep documents that are relevant to other staff's work in their personal filing system.

2.1.5. Destruction of Physical Records

When the minimum retention time for documents has expired they may be destroyed. When doing so, it must be ensured that they are illegible before they are released into the public waste system. This is especially crucial to classified documents and documents relating to Human Resources.

2.2. Digital Archive

The Medical Supply Unit keeps a digital archive to ensure smoother operations and quicker exchange of knowledge.

2.2.1. Structure

The archive consists of digital folders with sub-folders. Folder names are not ambiguous and dated where necessary.

File names are as specific as possible, even if this requires a long file name. Files are also dated when necessary.

Generally, any digital files that more than one person needs access to should be saved in the Google Drive to allow all staff to access them.

Among other things, this archive includes:

- Copies of all regularly given reports (e.g. donated items reports, service level reports, etc)
- All digital records relating to procurement (e.g. Order Confirmation, Quantification, PO scans, etc)
- MSU work plan, MSU budget
- Copies of important guiding documents such as the CHASL Operation Manual, Strategic Plans, Business Plan.
- Records relating to projects lead by MSU

The MSU Manager keeps a separate Confidential Folder in the same Drive.

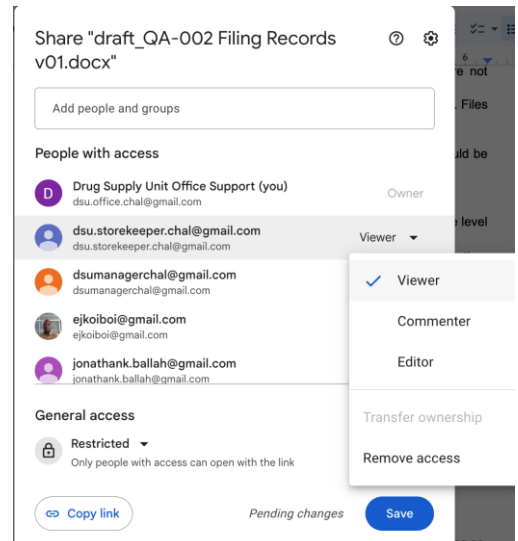
2.2.2. Access

All staff in the Medical Supply Unit and Senior Management Team are given access to the digital archive.

Certain files in the Drive should only be edited by management (e.g. the MSU budget), but other staff need to be able to view it. In this case: the MSU Manager restricts the editing rights within Google Drive to the authorized staff.

- under “Share”, change the individuals rights from “Editor” to “Viewer”

Documents meant only for management staff are kept in a separate Google Drive Folder that is only shared with management staff.



2.2.3. Maintenance of the Google Drive

Staff should regularly upload any edited files to the digital archive. When doing so, they are to check if there is a previous version of the same document. If so, the old version is either removed, or the new version is dated to indicate that it is newer. If folders become very full and hard to navigate, a sub folder named “archive” is created within the same folder. All documents less relevant to everyday operations are moved to the “archive” subfolder. That way, the documents are still accessible but do not distract from the more relevant up-to-date documents.

The MSU Manager is responsible to keep the Google Drive in order and expand the filing structure if necessary.

3. Maintenance, updating and Monitoring

This standard operating procedure is reviewed at the end of its validity period by the SOP committee.

See the SOP Identification, preparation, updating and monitoring of SOPs.

4. Documentation and record keeping/archiving

All SOP originals are archived by the MSU Manager. Expired versions of SOPs are kept for a minimum of 10 years.

Any documentation related to this SOP is archived by MSU and records are kept for 10 years.

6. Index of Changes

Version	Reasons for changes	Valid from
01	First version	1 st January 2026 - 31 st December 2030