



## Desk Manual Template

This template is designed to help employees document the core responsibilities, processes, and resources associated with their position. Completing this manual helps to ensure continuity during absences or transitions.

### Section 1: Position Overview

- a. Position Title
- b. Classification
- c. Division/Department
- d. Supervisor (Name, Title, Contact)
- e. Direct Reports (if applicable)
- f. Position Purpose Statement (1-2 sentences)

### Section 2: Key Responsibilities

List the core responsibilities by function. For each responsibility, indicate the description, frequency (daily, weekly, monthly, annually), and instructions.

### Section 3: Recurring Calendar

Outline monthly, quarterly, and annual tasks or deadlines.

### Section 4: Step-by-Step Instructions

Provide detailed instructions for completing specific tasks (e.g., budget transfers, payroll entry). Attach screen shots or link(s) to resources, if applicable.

### Section 5: Contacts & Resources

List key internal and external contacts relevant to position.

### Section 6: Institutional Knowledge

Capture acronyms, campus traditions, and 'unwritten rules' that help this role function smoothly.

### Section 7: Workflows & Approvals

Document approval chains and standard workflows.

### Section 8: Appendices

Attach or link to templates, checklists, org charts, and relevant policies.

***Pro Tip: Keep it simple. Update once a year. Store in a shared location.***

*This document is for informational purposes and does not replace formal policy.*

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