

EP-DIR-AP-10007, REV. 0

# ENVIRONMENTAL PROGRAMS PROCEDURE PREPARATION, REVISION, REVIEW, APPROVAL AND USE

Effective Date: 10/21/2011  
Next Review Date: 10/21/2016

Procedure Owner: Gail Toddings	Signature: <i>Gail Toddings</i>	Date: 10/19/11
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*Reference*

**REVISION HISTORY**

Document No./Revision No.	Issue Date	Action	Description
EP-DIR-AP-10007 / Rev. 0	10/21/11	New Document	<p>This procedure supersedes the following: SOP-4007, <i>Environmental Programs Directorate, Procedure Development</i>; EP-DIV-AP-0113; <i>WDP Procedure Administration, Use, and Compliance</i>; FOD9-AP-00001, <i>Procedure Preparation Revision Review, Approval and Use</i>.</p> <p>This administrative procedure defines the Environmental Programs (EP) administrative system for the preparation, revision, review, approval and use of EP procedures generated by the EP organizations</p>

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1. **PURPOSE**

This procedure establishes and defines the Environmental Programs Directorate (EP) administrative process for the preparation, revision, review, approval and use of all EP procedures and, as applicable, plans generated by EP organizations.

2. **SCOPE**

This procedure is applicable to EP subcontractors and matrixed organizations that generate, control, or use EP procedures.

The development and processing of EP Procedures, Administrative Procedures (APs), Plans, Detailed Operating Procedures (DOPs), Emergency Operating Procedures (EOPs), Abnormal Operating Procedures (AOPs), Alarm Response Procedures (ARPs), and Roundsheets (RSs) shall be performed in accordance with LANL P315, *Conduct of Operations Manual*.

3. **REFERENCES**

- EP-DIR-AP-10001, *ADEP Document Control*
- P300, *Integrated Work Management for Work Activities*
- P315, *Conduct of Operations Manual*
- EP-DIR-QAP-0001, *Quality Assurance Plan*
- DOE-STD-1029-92, *DOE Standard, Writers Guide for Technical Procedures*

4. **DEFINITIONS AND ACRONYMS**

4.1 **Definitions**

**Abnormal Operating Procedures (AOP)** – Provide instructions for responding to events that affect several systems, threaten the safety envelope, or require action to mitigate damage.

**Deactivation:** A temporary withdrawal of a document from authorized use. For example, a document might be deactivated for the duration of an activity suspension or during temporary unavailability of a facility. Deactivated documents are exempt from periodic review requirements, but should be reviewed before reactivation if the normal review date had passed.

**Administrative Procedures (AP)** – Program-specific Administrative Procedures applicable to ADEP Directorate.

**Alarm Response Procedures (ARP)** – Direct the response of personnel to visible and audible alarms.

**Controlled Index** - Index maintained in EDMS by DCC showing the latest approved revisions.

*Reference*

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4.1 Definitions (continued)

**Detailed Operating Procedures (DOP/SOP)** - Process-specific DOPs applicable to ADEP Directorate. DOPs shall be either a Use Every Time (UET) or Reference procedure. This also includes what is currently referred to SOP within some ADEP projects.

**Emergency Operating Procedures (EOP)** – Provide instructions for responding to events that result in operation outside the safety envelope.

**Emergency Response Procedures (ERP)** – Provide instructions for responding to an emergency in progress.

**Immediate Procedure Change (IPC)** – Changes limited to Administrative Procedures, Detailed Operating Procedures, Emergency Operating Procedures, Abnormal Operating Procedures, Alarm Response Procedures, that require work to continue that is in progress to support temporary modifications for critical activities.

**Major Revision** – Substantive modifications to a document that change the actual performance of the activity. Examples include changes in the hazard analysis or controls, the content or order of steps, the assignment of functional responsibilities, or the values of process parameters.

**Minor Revisions** – Nonsubstantive modifications to a document that change format, correct grammatical errors, update references or organizational names, or clarify without changing original intent. Minor revisions enhance usability but do not change the actual performance of the activity. Minor revisions:

- Must not increase risk.
- Must not alter implementation of a source requirement.
- Must not alter the purpose or scope of the document,
- Must not eliminate any required reviews or approvals, or
- Must not alter the operating, technical, design, process, regulatory, or quality requirements of a document.

**Notes** – Are used to call attention to supplemental information. They present information that assists the user in making decisions or improving task performance.

**Roundsheet** – Documents the daily, weekly and monthly inspection of equipment condition, status, and select operating parameters performed during rounds. Results are compared with acceptable status and/or ranges, and are monitored for indication of adverse or abnormal trends.

**Technical Procedures** – Procedures that direct facility and activity-level work. Examples are activities such as equipment operation, maintenance, testing, surveillance, data collection, laboratory research, or field operations

**Validation** – A field review, usually performed as a walkdown or simulation, to confirm that a document can be used as written in the environment where the task is to be performed.

**Verification** – A table-top review performed to ensure that a document is technically accurate and meets editorial standards.

*Reference*

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**4.2 Acronyms**

AOP – Abnormal Operating Procedure  
AP - Administrative Procedure  
ARP - Alarm Response Procedure  
DAR – Document Action Request  
DCA – Document Control Analyst  
DCC - Document Control Center  
DOP - Detailed Operating Procedure  
EDMS - Electronic Document Management System  
EOP – Emergency Operating Procedure  
FOD - Facility Operations Director  
IPC - Immediate Procedure Change  
PC - Procedure Coordinator  
QA - Quality Assurance  
RLM – Responsible Line Manager  
RS - Roundsheet  
SME - Subject Matter Expert  
UET - Use Every Time

**5. RESPONSIBILITIES**

**5.1 Responsible Line Managers/Document Owners**

- Identifies required procedures.
- Approves procedures developed within their respective area of responsibility.
- Assigns SMEs within their respective area of responsibility for procedure development.
- Ensures activities affecting quality are performed in accordance with documented instructions and procedures.
- Designates the required review authorities (including reviews by outside organizations) for new procedures developed within their respective area of responsibility.
- Ensures any affected procedures developed within their respective area of responsibility are promptly revised after the issuance of new or revised QA procedures or other company-level procedures.
- Ensures that personnel are provided training on the appropriate procedures and revisions to achieve and maintain proficiency in their assigned tasks.

*Reference*

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5. Responsibilities (continued)

**5.2 Training Specialist**

Ensures the development and implementation of training requirements based on new or revised procedures, in accordance with completed Training Level Determination (TLD) per EP-DIR-SOP-2011, *Personnel Training and Qualification*.

**5.3 Procedure Coordinator/Designee**

- Coordinates and tracks the preparation, review, approval, revision and publication of all EP procedures.
- Maintains a system to track requested changes from initiation to final approval.
- Coordinates the documented resolution of review comments on procedures prior to final approval and issuance.
- Coordinates IPC Roll-Ups after the fifth IPC.
- Maintains and revises the EP Procedure Review and Approval Matrices.
- Ensures proper document content, numbering, cancellation, formatting, and proper IPC/field changes are incorporated, as applicable.

**5.4 Project Personnel**

- Performs activities in accordance with the latest revision of approved procedures.
- Reports procedure errors or deficiencies to their management.
- Initiates requests for development, revision, or cancellation of procedures when necessary.
- Prepares procedures and reviewing procedure drafts, as assigned.

**5.5 Document Control Analyst (DCA)**

- Ensures current procedure revisions are available to project personnel.
- Maintains a history file for approved procedures.
- Monitors the status of periodic review schedules for active controlled documents.
- Notifies the RLM/Document Owner and Procedure Group, 90, 60 and 30 days before the periodic review date is due.

*Reference*

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**6. PROCEDURE**

**6.1 Development of New Procedures, Revisions, or Cancellations**

**NOTE:** *A Document Action Request (DAR) should be obtained from EP-DIR-AP-10001, ADEP Document Control procedure.*

EP personnel may identify the need for a new procedure, revision, or cancellation of an existing procedure by completing Section #1 of the DAR (Attachment 1) and shall forward the DAR to the RLM/Document Owner.

The RLM/Document Owner shall complete Section #2, and if approved, complete section #3. If the request is approved the RLM/SME shall coordinate with the Procedure Coordinator/Designee and/or complete the Procedure Request Form (Attachment 2 optional) to assign personnel to prepare new or revised procedure drafts.

If a DAR is disapproved, then it shall be returned to the originator with an explanation of the disapproval.

If a DAR is approved, the originator shall submit an electronic copy of the initial draft to the Procedure Coordinator/Designee.

Cancellation of existing procedures shall be processed by the Procedure Coordinator/Designee and shall receive the same level of approval as the original procedure.

The Procedure Coordinator/Designee may place a "Deactivation" on procedures for reasons such as temporary withdrawal of a document from authorized use, duration of an activity suspension, during temporary unavailability of a facility, or cancellation in progress, and are exempt from periodic review requirements, but should be reviewed before reactivation if the normal review date has passed.

**6.2 Procedures Format/Content**

Technical procedures shall be developed using the ADEP Procedure Template (Attachment 3).

Superseded documents shall be noted on the DAR and in the Revision History section, or the superseding document.

Administrative procedures define the communication and coordination activities necessary to carry out the facility's technical programs, management control programs, and design control programs. These procedures are not directly used to operate or maintain equipment or facilities, and do not require step-by-step performance and may "often" or "sometimes" be performed in any sequence. The ADEP Procedure Template can be used in formatting and developing administrative procedures.

All procedures shall be uniquely identified and shall be assigned a unique identification number by the DCC.

All procedures shall be uniquely identifiable, retrievable, and reproducible. If a procedure is cancelled, the unique identification number shall not be used again. Procedures are controlled in accordance with EP-DIR-AP-10001, *ADEP Document Control*.



*Reference*

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6.2 Procedure Format/Content (continued)

Changes incorporated into a procedure revision (e.g., Rev. 0 to Rev. 1) shall be identified via a vertical line (revision bar) in the margin of the affected text and noted in the Revision History section.

All major and minor revisions shall be indicated as (e.g., Rev. 0 to Rev 1)

Revision bars are not required for a procedure undergoing a total rewrite. However, the procedure shall be designated as "Total Rewrite" - Revision bars not included in the Revision History section.

The cover page shall include the following:

- Document identifier, including revision number
- Title
- Effective date
- Approval signatures (RLM/Document Owner)
- Usage Mode (Reference, Use Every Time "UET")

The header for each procedure (starting on the second page) shall include the following:

- Procedure Title
- Unique identifier-Document Number
- Revision number
- Effective date
- Draft (if applicable)
- Page number and total pages (e.g., Page 6 of 26)
- Usage Mode (Reference, Use Every Time "UET")

The initial electronic draft file of each procedure shall be identified with the assigned identification number and the proposed revision number followed by an alphabetic character beginning with the letter "A" to indicate the draft revision. Subsequent draft revisions shall be sequenced as "B," "C," etc.

The title of the position responsible for the performance of an activity shall be identified in the section that defines the requirements of the activity.

Procedures shall describe project activities in adequate detail to ensure that the steps can be performed as required.

Attached forms or charts, which will be beneficial to the user in accurately comprehending and using the required standards described in the procedure, shall be labeled "Example", excluding datasheets that are required to be completed during procedure performance.

*Reference*

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6.2 Procedure Format/Content (continued)

In accordance with P300, Integrated Work Management, work components and processes must be defined in sufficient detail to enable the hazards and the situations or circumstances in which they could cause harm to be identified and analyzed. A documented hazard analysis (e.g., Job Hazard Analysis Tool) **SHALL** be conducted on new Technical Operating Procedures before or in parallel with the procedure development phase to ensure that hazards are identified and controls are incorporated. Major revisions require a review of the existing hazard analysis document (e.g., Job Hazard Analysis Tool) against the changes to the activity in order to make a determination as to whether any associated hazards or controls are affected by the activity changes. If a hazard analysis has not been performed, then the Job Hazard Identification Process must be conducted. The following are exempt from this requirement:

- Minor revisions
- Administrative Procedures
- Alarm Response Procedures (ARPs)
- Abnormal Operating Procedures (AOPs)
- Emergency Operating Procedures (EOPs)
- Immediate Procedure Changes (IPCs) that implement a minor revision

A Facility Operations Director (FOD) or designee [e.g., Shift Operations Manager (SOM)] review and concurrence are required for all new hazard analyses and for any revision to a hazard analysis. Therefore when a technical procedure incorporates the hazard analysis the FOD or designee review and concurrence is required for any new technical procedure or major revision to a technical procedure that alters the hazards or controls associated with a technical procedure.

**6.3 Procedure Review and Concurrence Process**

Reviews shall be conducted on new and revised procedures per the Document/Review Approval Matrix (Attachment 4) and those scheduled for periodic review. Procedures are reviewed to ensure adherence to all environmental, technical, administrative and quality assurance requirements.

6.3.1 Review and Concurrence of New and Revised Procedures

Upon completion of the draft, the author shall provide the draft procedure and a completed DAR completed through Section #3 to the Procedure Coordinator for formal review.

The Procedure Coordinator shall coordinate and track the review status of procedures to ensure the reviews are scheduled, completed, and the comments are resolved in a timely manner.

During the review cycle, unapproved procedures shall be clearly marked "Draft" to indicate status.

The Procedure Coordinator/Designee will review the procedure for administrative compliance and formatting by completing a Procedure Writers Self-Verification Checklist or Procedure Verification Checklist, as applicable (Attachment 5/6). The Procedure Coordinator/Designee shall issue the procedure draft to the designated reviewing organizations.

*Reference*

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6.3.1 Review and Concurrence of New and Revised Procedures (continued)

Procedure reviews may be conducted during roundtable meetings with a member of the procedures group, reviewers or designees present.

**NOTE:** *The training organization should be included on distribution of a new or revised document in order to ensure that they are aware of upcoming changes, but not as a reviewer unless the training organization is affected by the document.*

The reviewer(s) shall document their review via email or on an approved Document Review and Concurrence Form (Attachment 7) electronically or in permanent (non-erasable) ink and sign, date, and return to the Procedure Coordinator by the required date for disposition of comments. Comments not received by the assigned reviewer on the required due date (i.e., 5 working days) shall be noted "No Comment" for that reviewer and included in the DHF.

**NOTE 1:** *Essential Comments by a reviewer **MUST** include the following supporting documentation:*

- *Technical information that is necessary to satisfy the needs of the reviewer's discipline/organization/group.*
- *Requirements source documents **MUST** be identified (e.g., OSHA, Policy, Program Documents)*
- *Justification for essential comment (e.g., technical inaccuracy)*

*Essential comments **may** be downgraded to Editorial Comments if the requirements as listed above are not satisfied.*

**NOTE 2:** *The RLM/Document Owner has the final decision on comment resolution.*

**NOTE 3:** *All essential comments **SHALL** be concurred with before the document is approved.*

Review comments and comment concurrence may be submitted by electronic means (e.g., email, or fax) as an acceptable alternative to the paper submittal.

Emails and faxes used to document review comments and comment concurrence will be included in the document history file (DHF).

A completed procedure review shall include the following:

- Procedure number
- Title and revision
- Date the review was completed
- Editorial comments as well as comments requiring disposition
- Disposition of comments
- Reviewer's concurrence indicating acceptance of comment disposition

*Reference*

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6.3.1 Review and Concurrence of New and Revised Procedures (continued)

The Procedure Coordinator shall assign a comment disposition due date (e.g., 10 working days) and will coordinate the disposition of comments with the author.

The authors shall disposition and incorporate comments as appropriate. The revised procedure with comments dispositioned shall be submitted to the Procedure Coordinator by the comment disposition due date.

**NOTE:** *A review is not complete until all comments requiring disposition are satisfactorily resolved. However, if a designated reviewer does not provide comments or requests an extension within the return due date listed on the procedure review form, (e.g., 5 working days), then that review shall be noted as "No Comments" and will be included in the DHF. Comments received after the due date shall be considered for the next revision.*

The Procedure Coordinator shall seek comment concurrence via email, or shall gain comment concurrence by forwarding the revised procedure and the Document Review and Concurrence Form with the dispositioned comments to the appropriate reviewers for comment concurrence.

The reviewers who submit comments shall indicate their concurrence with the comment resolutions by signing the Document Review and Concurrence Form (Attachment 7), if used, otherwise via e-mail to the Procedure Coordinator.

If there has been no response from a designated reviewer during the Review and Concurrence period, then the Responsible Manager shall note in the concurrence section of the DAR "No Response Received" for that reviewer or remove the reviewer from the DAR.

6.3.2 Procedure Validation

The Procedure Coordinator shall initiate Part # 1 of the Procedure Validation Checklist (Attachment 8), of the LANL Conduct of Operations Manual, P315, Chapter 16.0, Operations Procedures, and forward to RLM/Document Owner for validation.

The RLM/Document Owner shall identify SME to perform the validation, and the identified SME(s) will complete Part 2 Section A, and Part 2 Section B of the Procedure Validation Checklist.

Validations should be performed by a team composed of at least one validator and one procedure writer. If the procedure writer developed the procedure being validated, care must be taken to ensure that validator's comments are not explained in a way by the procedure writer interpreting what the procedure was intended to direct. Instructions should not require an interpretation for an experienced and knowledgeable individual. Additional personnel (e.g., engineering, training specialist, or senior supervisory watch) may be requested to participate on the validation at the discretion of the RLM/Document Owner.

For a specific validation, the validator is assigned by the RLM/Document Owner. The validator is ideally an individual who is knowledgeable about the process and who was not involved in developing the procedure.

*Reference*

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6.3.2 Procedure Validation (continued)

Typically, only Technical Operating Procedures are validated, however, Administrative Procedures may also be validated. The RLM/Document Owner determines the need for a validation and documents that need on the DAR form.

The RLM/Document Owner shall forward the completed Procedure Validation Checklist to the Procedure Coordinator.

6.3.3 Periodic Review of Procedures

**NOTE:** *Periodic reviews may be conducted earlier if specified by management.*

ADEP procedures shall be reviewed for accuracy, applicability, purpose, and scope on an established schedule. A periodic review of all ADEP procedures shall be conducted as follows:

Administrative/Other documents	Five years
Technical (DOPs/SOPs):	Three years
Emergency Procedures:	One year

The Procedure Coordinator shall coordinate with Management to ensure that the appropriate periodic reviews are performed and documented.

If a procedure is revised during other than the scheduled periodic review time and the requirements of the periodic review are conducted and documented, the next review is rescheduled based on the new revision date.

The DCA shall track periodic review dates, identify and notify the RLM/Document Owner of the date for the next required document review. (Attachment 9)

**6.4 Procedure Approval**

Following completion of the procedure review(s), resolution of comments, and procedure validation (as applicable), the Procedure Coordinator shall initiate a procedure approval package that includes a copy of the final procedure, DAR, and other supporting documentation (e.g., validation form and concurrence emails).

6.4.1 Approval Process

The approval process shall be completed in the following order:

- [1] The RLM/Document Owner shall complete the applicable Training Level Determination (TLD) form per EP-DIR-SOP-2011, *Personnel Training and Qualification*, for determination and initiation of necessary training and forward the form to ADEP training organization.
- [2] The RLM/Document Owner shall complete the "Training Determination completed by" section on the DAR and return the DAR to the Procedure Coordinator.

*Reference*

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6.4.1 Approval Process (continued)

- [3] The Procedure Coordinator/Designee shall forward the procedure to appropriate personnel for USQ/USI review and ensure USQ/USI section of the DAR is completed.
- [4] The Procedure Coordinator/Designee shall forward the procedure to a qualified Derivative Classifier for review unless the procedure falls under the Designated Unclassified Subject Areas (DUSAs) guidelines, [http://im-2.lanl.gov/source/security/classification/docs/dusa\\_manual.pdf](http://im-2.lanl.gov/source/security/classification/docs/dusa_manual.pdf), which allows the RLM/Document Owner to cite the DUSA number on the DUSA section of the DAR.
- [5] Procedure Coordinator/Designee removes "Draft" from the cover page and assembles approval package.
- [6] Procedure Coordinator/Designee forwards the approval package to the RLM/Document Owner.

**NOTE:** *The effective date of a procedure **SHALL** be assigned by the applicable RLM/Document Owner and **SHALL** not precede the approval date of the procedure. When determining the effective date of an approved procedure consideration **SHALL** be given to allowing time for facility preparedness, posting in the document control system, distribution, training and notification of affected organizations. A formal implementation plan may be warranted for the implementation of a procedure depending on the degree of changes in the procedure, the complexity of the new requirements in the procedure being implemented, and the degree of difficulty likely to be experienced by personnel in implementation of the new requirements. The effective date should be assigned at the time that a procedure is approved by the RLM/Document Owner but may be assigned at a later time for procedures where the actual implementation date is not known due to external influences such as readiness assessments or training requirements.*

- [7] RLM/Document Owner completes section 5, Final Approval, of the DAR signs and dates the procedure, and returns the procedure to the Procedure Coordinator.
- [8] Procedure Coordinator/Designee adds effective date to procedure and removes "Draft" from all pages in the procedure header.
- [9] The Procedure Coordinator shall enter on the cover page of the electronic word copy procedure "/s/" RLM's approval name and date, and email to the DCA along with the procedure next review date.
- [10] The Procedure Coordinator shall forward the procedure approval package (approved procedure and completed DAR) to the DCA for posting.
- [11] Procedure Coordinator/Designee shall provide completed document history file to Document Control Analyst within 3 working days of procedure being posted.

*Reference*

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6.5 Immediate Procedure Change (IPC)

An IPC should be limited to changes required to continue work in progress, support temporary modification for critical activities, as identified by the RLM/Document Owner. The RLM/Document Owner evaluates a proposed change to verify the need and to assess whether it is a major or minor change.

6.5.1 IPC Numbering

IPC numbering must be sequential and specific to the affected revision number. The revision number does not change (e.g., DOP 00001, Rev 2 IPC-1). The RLM ensures that the IPC information is entered in the IPC Log, located in the Operations Center.

6.5.2 IPC Initiation

The Originator marks the document to be changed as follows:

- Draw a single line through content to be deleted or changed, initial and date the change or electronically update the document.
- Enter the proposed content legibly; ensuring that reproduced copies will be legible. If additional pages are needed, attach them as insertable pages. Mark the added pages with the appropriate document header information and number them to indicate the insertion point (for example, following page 13, an inserted page would be 13A). Clearly mark the document at the specific location where the additional pages should be inserted.
- Place a vertical line (revision bar) in the margin, running the length of all changes. The IPC revision bar should be separate and distinct from any existing revision bars within the document.
- Enter the IPC number next to each revision bar.
- Record the IPC number (e.g., IPC-1, IPC-2) next to the revision number on the title page.

The Originator completes Section 1 of the Immediate Procedure Change Cover (Attachment 10) and forwards the Cover Sheet, marked-up document, and any additional pages to the RLM/Document Owner.

6.5.3 IPC Review

The RLM/Document Owner reviews the IPC, assigns and obtains SME reviewers (Attachment 10, Section 2) as deemed necessary to ensure the need, technical accuracy, and completeness of the proposed document modification. If the changes may be safety-basis related, Safety Basis (USQ) must review and concur with the changes.

*Reference*

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6.5 Immediate Procedure Change (IPC) (continued)

6.5.4 IPC Approval

If the RLM/Document Owner approves of the proposed change, he or she shall complete Section 3 of the IPC Cover Sheet after the appropriate reviews have been completed, including USQ processing, as required. If the IPC will be incorporated into the next document revision, the checkbox for "Permanent" is marked. If it is for short-term use, the RLM/Document Owner marks "Limited Use" and enters the expiration date and time, if applicable. Further explanation may be entered in the Comments field and documented in the IPC Log book, as applicable.

6.5.5 IPC Implementation

If work was paused contingent on the document change, the RLM/Document Owner shall notify the Originator and ensure affected personnel are cognizant of the changes prior to resuming the work according to the changed document. Copies of the IPC Cover Sheet are attached to the front of marked-up copies of the document until the document is processed by the Procedures Group and issued by the DCA.

6.5.6 IPC Control

If the shift ends before the IPC can be processed by the Procedures Group and issued by a DCA, then the RLM/Document Owner shall ensure that the IPC is included in the shift turnover, as applicable. The IPC Log book may be used to facilitate tracking and communication of approved IPC's.

As soon as practicable, and not to exceed three working days, the RLM/Document Owner shall forward the changed document and associated IPC Cover Sheet to the Procedures Group for processing. Once processed, the Procedures Group shall ensure that the IPC is incorporated into all controlled copies and forward the IPC to a DCA.

6.5.7 IPC Roll-Ups

Procedure revisions should be initiated when an IPC has been outstanding for an extended period (e.g., greater than 6 months), or when a procedure has been affected by several changes (five IPC's or more), or when the changes obscure the interpretation of the instruction. All currently effective IPC's should normally be incorporated when the procedure is revised.



*Reference*

**7. RECORDS PROCESSING**

[1] Copies of approved procedures and history records are maintained in accordance with:

EP-DIR-AP-10001, *ADEP Document Control*

EP-DIR-AP-10003, *Records Management Procedure for ADEP Employees*

[2] Procedure Coordinator ensures that documents generated by the performance of this procedure are processed as follows:

<b>Record Identification</b>	<b>Record Type Determination</b>	<b>Protection/Storage Methods</b>	<b>Processing Instructions</b>
Attachment 1, <i>Document Action Request, (DAR)</i> Attachment 5, <i>Procedure Writer's Self-Verification Checklist (Administrative)</i> Attachment 6, <i>Procedure Verification Checklist (Technical)</i> Attachment 7, <i>Document Review and Concurrence</i> Attachment 8, <i>Procedure Validation Checklist</i> Attachment 9, <i>Document of Periodic Review</i> Attachment 10, <i>Immediate Procedure Change (IPC) Cover</i>	QA Record	Submit records in accordance with EP-DIR-AP-10003, <i>Records Management Procedure for ADEP Employees.</i>	When the records are ready for final disposition, the record is transferred to Records Management in accordance with EP-DIR-AP-10003, <i>Records Management Procedure for ADEP Employees.</i>

[Click here for "Required Read" credit.](#)

*Reference*

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**8. ATTACHMENTS**

- Attachment 1 Document Action Request (DAR) (Example)  
<http://adep.lanl.gov/epdc/EPDCS/Procedures%20Policies/Administrative/EP-DIR-AP-10007-001.doc>
- Attachment 2 Procedure Request Form (Example Optional)  
<http://adep.lanl.gov/epdc/EPDCS/Procedures%20Policies/Administrative/EP-DIR-AP-10007-002.doc>
- Attachment 3 ADEP Procedure Template  
<http://adep.lanl.gov/epdc/EPDCS/Procedures%20Policies/Administrative/EP-DIR-AP-10007-003.doc>
- Attachment 4 Document Review/Approval Matrix (Example)  
<http://adep.lanl.gov/epdc/EPDCS/Procedures%20Policies/Administrative/EP-DIR-AP-10007-004.pdf>
- Attachment 5 Procedure Writer's Self-Verification Checklist (Administrative)  
<http://adep.lanl.gov/epdc/EPDCS/Procedures%20Policies/Administrative/EP-DIR-AP-10007-005.doc>
- Attachment 6 Procedure Verification Checklist (Technical) (Example)  
<http://adep.lanl.gov/epdc/EPDCS/Procedures%20Policies/Administrative/EP-DIR-AP-10007-006.doc>
- Attachment 7 Document Review and Concurrence Form (Example)  
<http://adep.lanl.gov/epdc/EPDCS/Procedures%20Policies/Administrative/EP-DIR-AP-10007-007.doc>
- Attachment 8 Procedure Validation Checklist (Example)  
<http://adep.lanl.gov/epdc/EPDCS/Procedures%20Policies/Administrative/EP-DIR-AP-10007-008.doc>
- Attachment 9 Document of Periodic Review (Example)  
<http://adep.lanl.gov/epdc/EPDCS/Procedures%20Policies/Administrative/EP-DIR-AP-10007-009.doc>
- Attachment 10 Immediate Procedure Change (IPC) Cover (Example)  
<http://adep.lanl.gov/epdc/EPDCS/Procedures%20Policies/Administrative/EP-DIR-AP-10007-010.doc>

Reference

**ATTACHMENT 1**

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**Document Action Request (DAR)**

(<http://adep.janl.gov/epdc/EPDCS/Procedures%20Policies/Administrative/EP-DIR-AP-10007-001.pdf>)

Document Action Request			
<b>Section 1 - Originator Request</b>			
Document No.:		Revision No.:	
Title:		Page ____ of ____	
Description of requested action (Attach numbered additional sheets if needed.):			
Originator Name (print):	Z#:	Organization:	Date:
<b>Section 2 - Responsible Manager Approval for Processing</b>			
<input type="checkbox"/> New Document	<input type="checkbox"/> Minor Revision	<input type="checkbox"/> Deactivation	<input type="checkbox"/> Perform Concurrent Periodic Review?
	<input type="checkbox"/> Major Revision	<input type="checkbox"/> Cancellation	
Superseded Document(s) and Revision Number:			
<input type="checkbox"/> Approved	<input type="checkbox"/> Disapproved (return to originator)	Comments:	
Signature:	Print Name, Title:	Z#:	Date:
<b>Section 3 - Hazard Determination</b>			
Hazard Determination: <input type="checkbox"/> Low <input type="checkbox"/> Moderate <input type="checkbox"/> High/Complex			
Document is authorized to serve as IWD? <input type="checkbox"/> Part I only <input type="checkbox"/> Full IWD <input type="checkbox"/> N/A			
<b>Section 4 - Approval Reviews (see F315, Ch 16, Section 16.5.3)</b>			
Discipline:	Name:	Signature:	Date:
Validation Required: <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Waive <input type="checkbox"/> Comment:			
Scope of Validation: <input type="checkbox"/> Entire Procedure <input type="checkbox"/> Change Only			
Validation Method: <input type="checkbox"/> Walkdown <input type="checkbox"/> Simulation <input type="checkbox"/> Tabletop <input type="checkbox"/> First Time Use			
Training Determination completed?: <input type="checkbox"/> Yes <input type="checkbox"/> N/A <input type="checkbox"/> Completed by:			
USQ/USI Number (if needed):	Signature:	Z#:	Date:
Derivative Classifier: <input type="checkbox"/> Unclassified	Signature:	Z#:	Date:
<input type="checkbox"/> OUC <input type="checkbox"/> UCNI <input type="checkbox"/> Classified			
<input type="checkbox"/> DUSA	Signature:	Z#:	Date:
DUSA #			
<b>Section 5 - Final Approvals</b>			
<input type="checkbox"/> Release	Details:		
<input type="checkbox"/> Hold			
Responsible Manager Signature:	Print Name, Title:	Z#:	Date:
Additional Approval Signature:	Print Name, Title:	Z#:	Date:

Attachment 1  
EP-DIR-AP-10001, R.4

Reference

**ATTACHMENT 2**

Page 1 of 1

**Procedure Request Form (Optional)**

(<http://adep.lanl.gov/epdc/EPDCS/Procedures%20Policies/Administrative/EP-DIR-AP-10007-002.pdf>)

**Procedure Request Form**

Request Date:	<input type="text"/>	Proposed Procedure Completion Date:	<input type="text"/>
Document Owner:	<input type="text"/>	If needed, new owner assigned by O&E:	<input type="text"/>
<input type="checkbox"/> New Procedure <input type="checkbox"/> Revision Current No. _____ <input type="checkbox"/> Cancellation <input type="checkbox"/> Deactivation			
Procedure Title:	<input type="text"/>		
List a brief description of changes:	<input type="checkbox"/> Major <input type="checkbox"/> Minor		
<b>EXAMPLE (Optional)</b>			
<b>Service(s) and Signature Coordination Requested for you with Procedure Manager to perform:</b>			
<input type="checkbox"/> Retrieve electronic document <input type="checkbox"/> Request DC number <input type="checkbox"/> Process/New Template			
<input type="checkbox"/> PCR Form <input type="checkbox"/> Review & Concurrence Form <input type="checkbox"/> Procedure Validation Checklist			
<b>Publication Services coordinated by Procedure Development Manager (optional)</b>			
<input type="checkbox"/> Review/Concurrence Due Date: _____ <input type="checkbox"/> Proof Read/Edit			
List Procedure Reviewers: _____			
<b>Consideration of additional reviewers:</b>			
<input type="checkbox"/> Associate Director <input type="checkbox"/> Program Director <input type="checkbox"/> Other: _____			
<b>This section to be completed by Procedure Coordinator/Designee, only</b>			
Sub Assigned: _____	<i>If more than one procedure is included in this request, list the numbers assigned by DCC</i>	Date procedure package delivered to Doc Control: _____	
Date provided to Sub: _____	Doc Control #: _____	<input type="checkbox"/> Sent final word version	
Date returned to PDM: _____	Supersedes #: _____	Date posted on web: _____	
Date sent to RFM: _____	Doc Control #: _____	Date procedure notification email sent: _____	
Date sent to Owner: _____	Supersedes #: _____	Comments: _____	
Date sent to SME(s): _____	Doc Control #: _____		
Date sent to QA: _____	Supersedes #: _____		
Date sent to ADC: _____			
Date sent to USQ: _____			
Date sent to CT: _____			

Return completed form to the Procedure Development Office (Room #03A).

**ATTACHMENT 3**  
**ADEP Procedure Template**  
(<http://int.lanl.gov/orgs/bps/proc-develop.shtml>)

(e.g., EP-AREAG-FO-DOP-0206, R.0)

**DOCUMENT TITLE**

**EXAMPLE**

Effective Date: \_\_\_\_\_

*Refer to DIV-GUIDE-0102, NWS Procedure Writer's Guide, and DOE STD-1029-92, Writer's Guide for Technical Procedures, for additional information.*

Procedure Owner:	Signature:	Date:
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**This document fully satisfies the requirements of P300, Integrated Work Management, in order to systematically describe the work activity, the associated hazards, and the controls that MUST be employed to mitigate the risks.**

Reference

ATTACHMENT 4  
Document Review/Approval Matrix

(<http://adep.lanl.gov/epdc/EPDCS/Procedures%20Policies/Administrative/EP-DIR-AP-10007-004.pdf>)

PROCEDURE REVIEW DISCIPLINES

**NOTE** *The table is provided to assist the Responsible Manager with selecting specific reviewing organizations in order to ensure that the document is accurate, correct, compliant, and complete. This list is not all-inclusive.*

Organization Name	Request Review and Concurrence for Documents that:
Facility Operations Director	All division level procedures and procedures that require a division level review and concurrence to maintain the facility safety and compliance envelop.
Engineering Management	Involve engineering policy or practices.
Operations Manager	Authorizes/releases all work within their scope to maintain the facility safety and compliance envelop. Review responsibilities may be delegated to the Shift Operations Manager.
Maintenance Manager	Ensures that both nuclear and nonnuclear facilities have safe, reliable, and efficient infrastructure maintenance and utilities support program.
Senior Shift Operations Manager	Implements multiple facility safety and compliance envelopes and adheres to authorized safety basis and other regulatory requirements. Review responsibilities may be delegated to the Operations Manager.
Shift Operations Manager	Activities are performed safely and in accordance with approved procedures and within the requirements of the Technical Safety Requirements. Review responsibilities may be delegated to the Shift Operations Supervisor.
Shift Operations Supervisor	Ensures work is being performed in a safe manner. Supervises and monitors Nuclear Operations performance.
Person-In-Charge	Assigned responsibility and authority for validation, coordination, execution, and closeout of a work activity in accordance with Integrated Work Management.
Cognizant Systems Engineer	Involve interaction with Vital Safety Systems (e.g., safety class or safety significant) and safety basis-related requirements (e.g., surveillance requirements).
Engineering	Involve interaction with systems/processes/facility, facility design basis, and operational requirements.
Criticality Safety Engineer/Officer	Describe the receipt, handling (e.g., venting, storage, and transfer), non-destructive measurement (e.g., assay and real-time radiography) of fissionable material bearing containers (e.g., 55-gal drums and 85-gal drums).
Environmental	Describe the handling, processing, use, storage, transfer, measurement, or inventory of hazardous chemicals, waste, and gases. Changes or modifications to Resource Conservation and Recover Act (RCRA) Treatment, Storage, and Disposal (TSD) facility permit requirements such as facility emergency equipment, communications equipment, and facility structure or equipment.
Fire Protection	Affect fire safety, including fire protection engineering, fire response, fire protection, and fire system inspection, testing, and maintenance and all related documents in accordance with the National Fire Protection Association requirements.
Industrial Hygiene	Concern issues associated with industrial hygiene and occupational safety.
Quality Assurance	Potential impact to QA requirements.
Radiological Protection	Affects radiological or radioactive systems/processes or alter systems or components that monitor/mitigate the consequences of a radiological accident. Work activities performed within a Radiological Controlled Area.
Security	Address: <ul style="list-style-type: none"> <li>• Protection of or access to classified matter</li> <li>• Physical or administrative access controls or boundaries of security areas</li> <li>• The installation, modification or removal of security systems (e.g., alarms)</li> <li>• Access or work performed by foreign nationals</li> </ul>
Software QA	Requires the use of any software.
Packaging and Transportation	Involve packaging, onsite transfer, or off-site shipment of material.
Affected Organization	Documents affecting the operations of an organization within a facility.
Training	Completes the Training Level Determination Form for every document.

Reference

**ATTACHMENT 5**

Page 1 of 1

**Procedure Writer's Self-Verification Checklist  
(Administrative Procedures)**

(<http://adep.lanl.gov/epdc/EPDCS/Procedures%20Policies/Administrative/EP-DIR-AP-10007-005.pdf>)

**PROCEDURE WRITER'S SELF-VERIFICATION CHECKLIST (Administrative)**

Procedure Title			
Procedure Number		Revision	
<b>General Format Characteristics</b>			<b>Yes No N/A</b>
1. Correct procedure number and revision number appear on all pages?			
2. Number of pages in the procedure matches the number on the last page?			
3. Revisions identified with a change bar? Are all previous rev bars removed?			
4. Title accurately reflects the procedure's purpose?			
5. Procedure steps are properly numbered?			
6. Correct procedure is listed in the header?			
7. Procedure has been spell checked?			
8. General and specific safety requirements are provided?			
9. Procedure title classification appears on each page?			
10. All instructions of a given step appear on the same page?			
11. Acronyms are spelled out the first time used?			
12. Notes are at the right location of the procedure, not the step/section on the same page and easily distinguishable from instructional steps?			
<b>Organization of Procedures</b>			
The procedure contains the following sections:			<b>Yes No N/A</b>
• Purpose – Accurately describes the task to be performed?			
• Scope – Indicates the range or boundary of applicability, responsibility, and requirements?			
• References – Referencing has been kept to a minimum?			
• Definitions and Abbreviations – Key terms, unfamiliar terms and terms subject to multiple interpretations are defined in this section?			
• Responsibilities – Major responsibilities and assigned organizations for accomplishing the procedure requirements are listed?			
• Procedure – Steps are in logical sequential progression for accomplishing the task?			
• Records – Step stating that records requiring retention are maintained in accordance with TA21-PLAN-00001?			
• Attachments – Attachments are legible, numbered, titled, and in correct order?			
<b>Attachments referenced in a step are:</b>			
• Included in the procedure?			
• Correctly identified and numbered?			
• Correct order relative to the other attachments?			
• References – Applicable DOE Orders, LANL Policies, and Federal Codes and Regulations listed?			
Completed By:			
Signature	Print Name	Date	

Reference

**ATTACHMENT 6**  
**Page 1 of 1**  
**Procedure Verification Checklist**  
**Technical and Response**

<http://adep.lanl.gov/epdc/EPDCS/Procedures%20Policies/Administrative/EP-DIR-AP-10007-006.pdf>

Procedure Verification Checklist (Page 1 of 3)			
Document Title:	No.:	Revision:	Draft: C
		Yes	No N/A
1. Applicable guidelines of DOE-STD-1029-92 addressed.		<input type="checkbox"/>	<input type="checkbox"/>
2. Purpose adequately presents the intent of the document.		<input type="checkbox"/>	<input type="checkbox"/>
3. Scope describes major activities, and identifies the boundaries of the document.		<input type="checkbox"/>	<input type="checkbox"/>
4. Punctuation and spelling correct.		<input type="checkbox"/>	<input type="checkbox"/>
5. Specific safety requirements provided.		<input type="checkbox"/>	<input type="checkbox"/>
6. Radiation and contamination requirements listed when required.		<input type="checkbox"/>	<input type="checkbox"/>
7. Applicable references listed.		<input type="checkbox"/>	<input type="checkbox"/>
8. Prerequisites specified, such as plant conditions, valve lineups, LO/TO, and Co. etc.		<input type="checkbox"/>	<input type="checkbox"/>
A. Identifies all portable material and test equipment required and calibration requirements.		<input type="checkbox"/>	<input type="checkbox"/>
B. Identifies special equipment required to perform the activity.		<input type="checkbox"/>	<input type="checkbox"/>
C. Includes requirement to be on plan-of-the-day, minimum staffing, and pre-job briefing.		<input type="checkbox"/>	<input type="checkbox"/>
D. Identifies required support systems and potential permits.		<input type="checkbox"/>	<input type="checkbox"/>
9. Location where readings are taken clearly identified.		<input type="checkbox"/>	<input type="checkbox"/>
10. Includes unique equipment identifiers (IDs).		<input type="checkbox"/>	<input type="checkbox"/>
11. Ensures consistency among equipment labels, drawings (as applicable), and document nomenclature.		<input type="checkbox"/>	<input type="checkbox"/>
12. Identifies alarms that could be expected to be activated as a result of performing this document.		<input type="checkbox"/>	<input type="checkbox"/>
13. Identifies the performer (functional or organizational title) for each action.		<input type="checkbox"/>	<input type="checkbox"/>
14. Steps involving criticality safety implications, safety bases implications, technical limits, or process requirements are identified by a dollar sign (\$) or other defined designator and the requirement source is identified in parentheses at the end of the step.		<input type="checkbox"/>	<input type="checkbox"/>
15. Permitted tolerances are within a given range.		<input type="checkbox"/>	<input type="checkbox"/>



Reference

**ATTACHMENT 7**

Page 1 of 1

**Document Review and Concurrence Form**

(<http://adep.lanl.gov/epdc/EPDCS/Procedures%20Policies/Administrative/EP-DIR-AP-10007-007.pdf>)

Document Review and Concurrence (Page 1 of 2)				
Document Title:		Number:		Revision:
				Draft:
Document Action: <input type="checkbox"/> New <input type="checkbox"/> Revision <input type="checkbox"/> Deactivation <input type="checkbox"/> Cancellation				
Comments due by:			Concurrence due by:	
Reviewer Name:			Z#:	Discipline:
Instructions: Number comments sequentially. Designate as essential (E) or suggested (S). Only essential comments require concurrence with the disposition. Use extra sheets as needed, including the document information in the header and numbering the pages. For revisions, limit comments to the content that has changed. For no comments, check the applicable box and sign the form. Return the completed form to the Point of Contact listed below:				
<input type="checkbox"/> No comments <input type="checkbox"/> Waive (Document has no impact or relevance to our discipline or organization.)				
No.	E/S	Document Section	Comment	Disposition
Reviewer Signature:		Print Name:		Z#:
				Date:
Dispositioner Signature:		Print Name:		Z#:
				Date:
Concurrence Signature:		Print Name:		Z#:
				Date:
Return to Point of Contact:			Z#:	Organization:

Reference

**ATTACHMENT 8**  
**Page 1 of 1**  
**Procedure Validation Checklist**

<http://adep.lanl.gov/epdc/EPDCS/Procedures%20Policies/Administrative/EP-DIR-AP-10007-008.pdf>

Procedure Validation Checklist (Page 1 of 2)					
Part #1 - To Be Completed by the Issuing Organization					
Title:	Number:	Rev:	Draft:		
Preparer:	Z.No.:	Phone:			
Validation Method	<input type="checkbox"/> Walkdown	<input type="checkbox"/> Simulation	<input type="checkbox"/> Tabletop <input type="checkbox"/> First Time Use		
Part #2 - To Be Completed by the Procedure Validator(s)					
Instructions: For each "No" answer, provide comment(s) on comment sheet or markup the procedure to reflect necessary changes.					
Part 2, Section A - User Compatibility			Yes	No	N/A
Can the instructional steps be performed in sequence as written?					
Does each step provide sufficient detail to complete the activity?					
Have steps or information omitted that are needed to perform the activity?					
Are steps sequential?					
Are steps limited to one action per step where possible?					
Are steps easily read & understood?					
Are required actions and responsibilities clearly defined?					
Are references to other steps within the procedure correct?					
Are instructions to branch to other procedures correct?					
Are tolerances and units of measure provided where needed?					
For time-critical actions, can steps be performed within time limits?					
If an activity is performed by more than one person, is adequate direction provided for communication and coordination?					
Are stop action limits provided for steps which specify adjustments to accomplish a task?					
Does the document match the actual work or process sequence?					
Can all steps be performed without inadvertently isolating or bypassing safety systems?					
Can the document be performed with the required steps?					
Are spaces for recording entries adequate?					
Part 2, Section B - Field Compatibility			Yes	No	N/A
Are locations specified by the procedure different from field installation?					
Do specified units of measure match those indicated on the instrumentation?					
Are equipment/components identified clearly and reflect the exact equipment field nomenclature?					
Are tools, instruments, or materials needed to complete the task specified?					
Is necessary personal protective clothing/equipment specified?					
Can steps be performed safely (hazards to personnel & equipment identified)?					
Are protective measures adequate to protect personnel?					
Does information provided in figures and tables match the field installation?					
Does the document identify major symptoms and automatic equipment associated with an abnormal condition that could be expected to occur as a result of performing the activity?					
Are steps that involve or may affect safety limits (e.g., TSR) clearly identified and communicated to the user?					
Are potential emergency actions adequately defined?					

Reference

**ATTACHMENT 9**

Page 1 of 1

**Document of Period Review**

(<http://adep.lanl.gov/epdc/EPDCS/Procedures%20Policies/Administrative/EP-DIR-AP-10007-009.pdf>)

**Documentation of Periodic Review**

Document Number: \_\_\_\_\_ Revision: \_\_\_\_\_

Title: \_\_\_\_\_

Due Date for Review: \_\_\_\_\_ Responsible Line Manager: \_\_\_\_\_ Z#: \_\_\_\_\_

*Editorial Review and Validation are suggested methods of evaluation, but are not required*

Evaluation	YES	NO	N/A
1 Editorial Review performed?			
2 Validation performed?			

Evaluation Results	YES	NO	N/A
3 Is the document, in its entirety, still needed for operations at the facility? (If No, skip questions 4 – 7 and select 'Cancellation' in revision.)			
4 Is the document technically accurate?			
5 Is the document up-to-date and current?			
6 Are references current and complete? (If 'No,' a Minor Revision should be considered.)			
7 Does the document satisfy the current format requirements?			

8 Based on this evaluation, the following action is required:  
None The document is extended in accordance with its periodic review cycle  
Revision Initiate a revision in accordance with the governing procedure  
Cancellation Initiate cancellation in accordance with the governing procedure

9 Periodic Review Evaluation Performed By

Name (print)	Signature	Z number	Date
--------------	-----------	----------	------

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Approved: \_\_\_\_\_  
Responsible Line Manager (Representative (print)) Signature Z number Date

Reference

**ATTACHMENT 10**

Page 1 of 1

**Immediate Procedure Change (IPC) Cover**

(<http://adep.lanl.gov/epdc/EPDCS/Procedures%20Policies/Administrative/EP-DIR-AP-10007-010.pdf>)

Immediate Procedure Change (IPC) Cover			
<b>Section 1 – Originator Request</b>			
Document No.:	Revision No.:	IPC No.:	
Title:			
Description of need and requested action (Attach document mark-up and numbered additional sheets, if needed):			
Originator Name (print):	Organization:	Z#:	Date:
<b>Section 2 – Review</b>			
Discipline:	Name:	Signature:	Date:
USQ/USI Number:	<input type="checkbox"/> N/A		
<b>Section 3 – Final Approvals</b>			
POD Concurrent:	Print Name and Title:	Z#:	Date:
<input type="checkbox"/> Permanent	Effective Date:		
<input type="checkbox"/> Limited Use	Expiration Date:		
Comments:			
Responsible Manager Signature:	Print Name and Title:	Z#:	Date:

EXAMPLE