

## **Administrative Manual**

# **Administrative Procedure Development**

**Revision 0**

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**Approved By:** \_\_\_\_\_ signature \_\_\_\_\_ print name/title \_\_\_\_\_ date

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

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### 1.0 INTRODUCTION

#### 1.1 Purpose

The company requires a documentation program for policies, programs, procedures, and forms that meet the requirements of ISO9000 standards. This document provides development standards for documentation programs.

#### 1.2 Scope

- 1.2.1 This guideline applies to all offices and facilities except as otherwise defined in contract requirements.
- 1.2.2 All policies, programs, procedures, and forms will be governed by the requirements and processes of this Guideline. The Guideline includes:
  - Identification
  - Development
  - Review & Comment
  - Translation
  - Revision

### 2.0 DEFINITIONS

- 2.1 **Danger** – An immediate hazard with a high probability of severe personal injury or death for non-compliant behavior.
- 2.2 **Warning** – The presence of hazards or unsafe practices which could result in severe personal injury, death, or severe economic impact.
- 2.3 **Caution** – Possible hazards or unsafe practices which could result in minor injury or product/property damage for non-compliant behavior.
- 2.4 **Primary Facility Language** – the official language used in day-to-day operation and maintenance of the facility.

### 3.0 RESPONSIBILITIES

- 3.1 **President, Operations and Maintenance** – Implements all corporate policies, programs, procedures, and guidelines. Approves standardized documentation processes.
- 3.2 **Manager, Training & Documentation** - Reviews and approves all procedures.
- 3.3 **Quality Manager** – Implements control processes (verify, issue, archive, and audit) for all quality-level documentation and records.
- 3.4 **Employees** – Implement approved policies, programs, and procedures. Recommend document changes to the Quality Manager. Development and review new and revised procedures as assigned.

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### 4.0 GUIDELINE

#### 4.1 Administrative Procedures

The development process for policies, programs, and administrative procedures is shown in Figure 1 at the right.

The following are requirements for all procedure development:

- The word “shall” and its equivalents shall be used to indicate a requirement; “should” for recommendations; and “may” for permission.
- Caution, Warning, and Danger notices shall be visually distinct and precede the applicable step or section.
- Background information or clarification for action steps shall follow the applicable step as a note if inclusion is necessary.
- Numbering shall be used when the sequence is a requirement. Lists may be used when sequence is unimportant.
- Excessive skipping via referenced sections or procedures should be avoided.
- Acronyms and references shall be fully identified at first appearance in a document and in subsequent entries that could be misinterpreted.
- Technical terminology using common English words/acronyms should not be translated.
- All labels/indications called out in procedures shall replicate actual labels/indications.
- References called out in the procedure shall not include the revision number unless a version other than the most recent available is to be specified.

##### 4.1.1 Identification

1. **DRAFT** the document purpose and scope.
  - **Purpose** – defining the intent and objective(s) of the procedure.
  - **Scope** – delineating the boundaries of applicability.
2. **DEFINE** the document title in concise, clear terms.
3. **IDENTIFY** the applicable section for the procedure from the following:
  - ADM Administration
  - CON Construction
  - SUP Startup
  - MOB Mobilization
  - OME Operations, Maintenance, and Engineering
  - MSC Miscellaneous

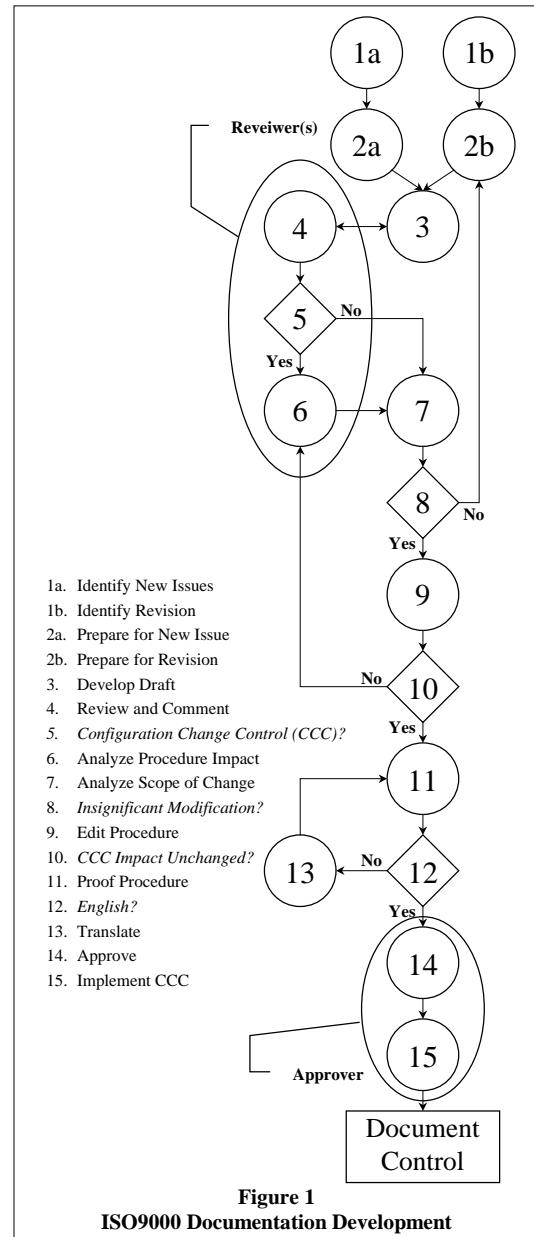


Figure 1  
ISO9000 Documentation Development

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4. **REGISTER** the identified procedure as the next available number in the Procedure Index as - **yyy-zzz-aabb** where:

- yyy = Section
- zzz = Sequential procedure number
- aa = Sequential revision number
- bb = Language designator (e.g., en, sp, pt)

**Examples:**

*ADM-001-00en = the initial revision of the first procedure (English) under Administration*

*OME-010-04sp = the fourth revision of the tenth procedure (Spanish) for Operations, Maintenance, and Engineering*

5. **SCHEDULE** the procedure development effort.

### 4.1.2 Development

**Note:**

*All procedures should be drafted in the primary facility language.*

1. **ANALYZE** the following to determine procedure development requirements:
  - Initiating cue (reason, requirement)
  - Intended end-user (knowledge, skill, and abilities)
  - Use environment
  - Activity *Frequency, Difficulty, and Criticality*.
2. **ASSEMBLE** resource information.
3. **OUTLINE or MAP** the process(es) included in the procedure purpose and scope.
4. **OPEN** a *New* document using the appropriate template for administrative programs and procedures.
  - ADM-ENen; Administrative; 8½×11; English
  - ADM-A4en; Administrative; A4; English
  - ADM-ENsp; Administrative; 8½×11; Spanish
  - ADM-A4sp; Administrative; A4; Spanish
  - ADM-A4pt; Administrative; A4; Portuguese (Brazilian)
5. **SAVE** the file as a document using the complete procedure number reserved in section 4.1.1, step 4, using the next sequential revision number.
6. **MODIFY** the procedure baseline information.
  - Change the Manual title in the cover page header.
  - Enter the procedure title and number in all subsequent headers.
  - Enter the document file name and revision number and date in all footers.
7. **If** revising the procedure, **then** **CLEAR** the existing revision bars in the document.

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### **Note:**

*Styles included in the template should be used for all routine text entries. New styles should be created for all special requirements.*

8. **DRAFT** the procedure or revision to achieve the defined purpose and to encompass the identified scope, including the following sections:

- **1.1 Purpose:** defines the intent and objective(s) of the procedure
- **1.2 Scope:** delineates the boundaries of applicability.
- **2.0 DEFINITIONS** – defines obtuse terminology, infrequently used technical expressions, and non-standard terms.
- **3.0 RESPONSIBILITIES** – assigns and identifies culpability for the document and activities identified in the document.
- **4.0 GUIDELINE** – provides all program information and activity direction.
- **5.0 REFERENCES** – lists by number and title all published resource materials and other documents referenced by the guideline/procedure (including forms).
- **6.0 APPENDICES** – lists additional information needed to perform activities identified in the guideline/procedure having scope, format, or physical size too large to appear in section 4.0 of the procedure. Appendices shall be maintained as independent documents and kept in a separate Appendix volume.

### **Note:**

*Documents that have their own unique document control number should be called out as a reference by number and title in the procedure and not appear as appendices.*

9. **TEST** the procedure to verify its effectiveness using someone meeting the baseline qualifications of the target user.
10. **MARK** the revised portions of the procedure with a revision bar in the right margin (not required for new procedures or complete rewrites or editorial corrections).

### **4.1.3 Review and Comment**

1. **LIST** all groups and persons with a need to review and comment on the draft procedure.
2. **DETERMINE** a due date for receipt of all comments.
3. **ATTACH** a Configuration Change Control form of the appropriate language for any of the following included in review and comment distribution:
  - Operations
  - Maintenance
  - Engineering
  - Safety
  - Environmental
  - Training
  - Human Resources
  - Quality

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4. **DISTRIBUTE** the draft with a Document Review and Comment form of the appropriate language attached with the following completed:

- Procedure number, title, and revision
- Routing (check or add the appropriate entities by department/group, title, or name)
- Developer name, contact information, and due date

5. *(Reviewer)* **COMPLETE** the following actions:

- a. **RECORD** all comments in the right column of a Document Review and Comment form.

**Note:**

*Technical questions or comments that preclude continuing the review should be clarified with the developer immediately to avoid delays. Editorial remarks should be made directly in the procedure.*

- b. **ANALYZE** the draft procedure per ADM-002, Configuration Change Control (if applicable).
  - c. **RECORD** the Reviewer name, title, and contact information on the Review and Comment form.
  - d. **SIGN/DATE** the Review and Comment form.
  - e. **FORWARD** the procedure markup, Review and Comment form, and Configuration Change Control form (if applicable) to the Developer no later than the due date indicated in the transmittal.

**Note:**

*Comments received after the indicated due date will only be considered if they affect the safety of personnel and equipment.*

6. **ANALYZE** the scope of all returned comments after the due date. If the change is substantial, then REPEAT from step 4.1.2.7.
7. **RESOLVE** all issues identified by Reviewers and **SIGN/DATE** the forms documenting the resolution.
8. **FORWARD** the signed form with comment resolution to the Reviewer for acknowledgement.
9. *(Reviewer)* When the Review and Comment form is returned with comment resolution, **SIGN/DATE** the form indicating acceptance and **RETURN** the completed form to the Developer.
10. **REVISE** the draft including all comment and question resolutions.
11. **REVIEW** the scope of the revision with all CCC Reviewers to determine the level of impact on the results of CCC analysis.
12. **PROOF** the final version of the procedure (format, editorial, and technical) using Procedure Quality Checklist for the appropriate language.
13. **FORWARD** the procedure with all completed forms to the responsible position for approval.
14. If non-English is the primary facility language, then **TRANSLATE** per section 4.1.5.

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### 4.1.4 Approval

1. **VERIFY** the following:
  - Technical accuracy
  - Purpose/Scope fulfillment
  - Documentation quality (signatures, dates, reviewer identification)
2. **REVIEW** the Configuration Change Control forms for implementation impact.
3. **DEVELOP** a procedure implementation plan.
4. **DESIGNATE** a person to be responsible for procedure implementation.
5. **ASSIGN** an effective date for the procedure.
6. **SIGN/DATE** the procedure for approval.
7. **FORWARD** the procedure to Document Control.

### 4.1.5 Translation

1. **OPEN** a *New* document using the appropriate template. **SELECT** one of the following for administrative programs and procedures matching the page layout of the original procedure:
  - ADM-ENen; Administrative; 8½×11; English
  - ADM-A4en; Administrative; A4; English
2. **SAVE** the file using the complete procedure reserved in section 4.1.1 above where bb = en.
3. **MODIFY** the procedure baseline information.
  - Change the facility name and Manual title in the cover page header.
  - Enter the procedure title and number in all subsequent headers.
  - Enter the document file name and revision in all footers.
4. **TRANSLATE** the proof procedure.
5. **TEST** the translated procedure to verify its effectiveness using someone meeting the baseline qualifications and language skills of the target user.
6. **PROOF** the final translated version of the procedure (format, editorial, and technical) per Procedure Quality Checklist.
7. **FORWARD** the procedure to the responsible position for approval per section 4.1.4.

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### 4.1.6 Revision

The need for procedure revision may be prompted by one of the following cues:

- Design/process change
- Procedure fault/error
- Improvement recommendation
- Annual revision milestone

Revisions of a non-substantive nature (e.g., correction of misspelled words, punctuation, typographical errors) will be incorporated during the annual review. The revision date will change, but not the revision number. For non-substantive revisions, it is acceptable to issue only the revised page(s).

1. **DETERMINE** revision milestones.
2. **ASSEMBLE** procedure resources, references, and the contents of the comment file.
3. **ANALYZE** the initiating cue and source materials to determine the scope of revision.
4. **OBTAIN** a copy of the procedure master file.
5. **REPEAT** from section 4.1.2, step 5.

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### 4.2 Forms

#### 4.2.1 Identification

1. **DEFINE** the form purpose and scope.
  - **Purpose** – defining the intent and objective(s) of the form.
  - **Scope** – delineating the boundaries of applicability.
2. **DEFINE** the form title in concise, clear terms.
3. **REGISTER** the identified form as the next available number in the Form Index as **UEI-fzzz-aabb** where:
  - f = Form designator
  - zzz = Sequential form number
  - aa = Sequential revision number
  - bb = Language designator

*Examples:*

*f014-02en = the second revision of the fourteenth form identified in English*

*f022-00pt = the initial revision of the twenty-second form identified in Portuguese*

4. **SCHEDULE** the form development effort.

#### 4.2.2 Development

*Note:*

*All forms should be drafted in the primary facility language.*

1. **OUTLINE or MAP** the process(es) included in the form purpose and scope.
2. **DRAFT** the form or form revision to achieve the defined purpose and to encompass the identified scope.
3. **SAVE** the form file as a document using the complete form number reserved in section 4.2.1, step 3, using the next sequential revision number.
4. **TEST** the form to verify its effectiveness using someone meeting the baseline qualifications of the target user.

#### 4.2.3 Review and Comment

1. **LIST** all groups and persons with a need to review and comment on the draft form.
2. **DETERMINE** a due date for receipt of all comments.
3. **DISTRIBUTE** the draft form with a f001; Document Review and Comment form of the appropriate language attached with the following completed:
  - Procedure number, title, and revision
  - Routing (check or add the appropriate entities by department/group, title, or name)
  - Developer name, contact information, and due date

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4. (Reviewer) **COMPLETE** the following actions:

- a. **RECORD** all comments in the right column of a f001; Document Review and Comment form.

**Note:**

*Technical questions or comments that preclude continuing the review should be clarified with the developer immediately to avoid delays. Editorial remarks should be made directly on the form.*

- b. **RECORD** the Reviewer name, title, and contact information on the Review and Comment form.
  - c. **SIGN/DATE** the Review and Comment form.
  - d. **FORWARD** the form markup, and Document Review and Comment form(s) to the Developer no later than the due date indicated in the transmittal.

**Note:**

*Comments received after the indicated due date will only be considered if they affect the safety of personnel and equipment.*

5. **ANALYZE** the scope of all returned comments after the due date. If the change is substantial, then **REPEAT** from step 4.1.2.7.
6. **RESOLVE** all issues identified by Reviewers and **SIGN/DATE** the forms documenting the resolution.
7. **FORWARD** the signed form with comment resolution to the Reviewer for acknowledgement.
8. (Reviewer) When the Document Review and Comment form is returned with comment resolution, **SIGN/DATE** the form indicating acceptance and **RETURN** the completed form to the Developer.
9. **REVISE** the form including all comment and question resolutions.
10. **PROOF** the final version of the form (format, editorial, and technical).
11. **COMPLETE** a f004, Form Approval.
12. **FORWARD** the approval package (Form Approval, Procedure Quality Checklist, and all Document Review and Comment forms) to the responsible position for approval.
13. If non-English is the primary facility language and English versions will be required, then **TRANSLATE** the form per section 4.2.5.

### 4.2.4 Approval

1. **VERIFY** the following:
  - Technical accuracy
  - Purpose/Scope fulfillment
  - Documentation quality (signatures, dates, reviewer identification)
2. **SIGN/DATE** the Form Approval form.
3. **FORWARD** the form to Document Control.

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### 4.2.5 Translation

1. **SAVE** the file using the complete form number reserved in section 4.2.1 above where bb = en.
2. **TRANSLATE** the proof form.
3. **TEST** the translated form to verify its effectiveness using someone meeting the baseline qualifications and language skills of the target user.
4. **PROOF** the final translated version of the form (format, editorial, and technical).
5. **FORWARD** the procedure to the responsible position for approval per section 4.2.4.

### 4.2.6 Revision

The need for form revision may be prompted by one of the following cues:

- Design/process change
- Form fault/error
- Improvement recommendation

Revisions of a non-substantive nature (e.g., correction of misspelled words, punctuation, typographical errors) will be incorporated during the next technical revision.

1. **DETERMINE** revision milestones.
2. **ASSEMBLE** procedure resources, references, and the contents of the comment file.
3. **ANALYZE** the initiating cue and source materials to determine the scope of revision.
4. **OBTAIN** a copy of the form master file.
5. **REPEAT** from section 4.2.2, step 3.

## 5.0 REFERENCES:

- 5.1** ISO9000; International Standards Organization, Quality Standards
- 5.2** ADM-02: Configuration Change Control
- 5.3** ADM-03; Document Control and Distribution
- 5.4** f001; Document Review and Comment
- 5.5** f002; Configuration Change Control
- 5.6** f003; Procedure Quality Checklist
- 5.7** f004; Form Approval

## 6.0 APPENDICES:

- Appendix A**      Style Manual