



# CONTROLLED DOCUMENT TEMPLATE GUIDELINES

PROCESS OWNER:	<b>Teresa Alvarado</b>
DOCUMENT NO.:	<b>F-423-046</b>
REVISION:	<b>D</b>
EFFECTIV E DATE:	<b>9-24-14</b>
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To download the Controlled Document Template [click here](#).

For assistance with this template, contact the Document Control Administrator.

- For **Procedures**: complete all sections of this template.
- For **Work Instructions**: include only the document header, Purpose, Scope, Roles and Responsibilities, and Change History table. Work Instructions can also be a flowchart, diagram, table, etc.
- For **Forms**: include the document number, title, revision level, revision date, and either a document header or footer.

**1. PURPOSE:** Describe what the procedure or work instruction is and if it is related to any requirements, e.g., Board policies, regulatory or legal requirements, best practices, etc. The purpose statement gives the reader an accurate understanding of what the document will cover.

**2. SCOPE:** Describe the extent or operational area to which the procedure or work instruction applies, e.g., who is involved, when are activities scheduled, what are the deliverables, are there activities outside the scope, etc.

**3. REFERENCE DOCUMENTS:** Identify documents and/or on-line resources related to or required by the procedure.

EXTERNAL REFERENCE DOCUMENT TITLE	DOCUMENT LOCATION(S)
Identify documents external to the District that exert control over a District procedure. Examples include relevant state regulations, codes, industrial specification manuals, operating and repair manuals, ISO Standards, industry standards, regulatory requirements, etc. If not applicable, indicate "None."	Identify where the most current version of the reference document can be located. For example, the District Library, on-line Document Control Database, District Intranet, website address, etc.

INTERNAL REFERENCE DOCUMENT TITLE	DOCUMENT LOCATION(S)
Identify documents originating from within the District that are necessary to complete the procedure. Examples include, District Board and Administrative policies, MOUs, agreements, etc. If not applicable, indicate "None."	Identify where the most current version of the reference document can be located. For example, the District Library, on-line Document Control Database, District Intranet, website address, etc.



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**4. DEFINITIONS:** Define any terms and/or acronyms that are stated in the procedure. If not applicable, indicate "None."

**5. ROLES AND RESPONSIBILITIES:** Define what is expected from anyone identified with a role and responsibility in the procedure.

**6. ISO REQUIREMENTS:** For assistance, contact the Document Control Administrator for the appropriate ISO requirement(s).

<i>ISO 9001:2008 QUALITY MANAGEMENT SYSTEM</i>	<i>ISO 14001:2004 ENVIRONMENTAL MANAGEMENT SYSTEM</i>

**7. MONITORING AND MEASUREMENT**

**Monitoring:** This controlled document will be reviewed annually or as directed by the Process Owner to ensure the procedure is current and relevant.

**Measurement:** If applicable, describe how the procedure will be measured for effectiveness. If not applicable, indicate "None."



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**8. PROCESS STEPS:** *Developing the procedure section, first, makes it easier to complete the remaining sections of this template.*

PROCESS STEP TITLE	ROLE	STEP-BY-STEP INSTRUCTIONS	<b>QUALITY RECORDS (OUTPUT(S) FROM PROCESS STEP)</b> Completed forms, reports, e-mails, general correspondence, and/or data that demonstrate compliance to a requirement or provides evidence of activities conducted. These are included in the Quality Records table below.
(1)  <i>Example: Define New Procedure</i>	<i>Example: Process Owner</i>	1. 2. 3.  <i>Example: 1. Download the procedure template 2. Complete each section of the template 3. Route procedure for approval</i>	<i>Example: Procedure Document Approval Form</i>
(2)		1. 2. 3.	
(3)		1. 2. 3.	
(4)		1. 2. 3.	
(5)		1. 2. 3.	

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**9. QUALITY RECORDS:** Quality records listed above demonstrate that process steps were followed and are included here.

QUALITY RECORD	LOCATION KEPT	FILING ORDER	RECORDS RETENTION SCHEDULE SERIES NO.
<i>Example: Procedure Document Approval Form</i>	<i>Example: Process Owner Files</i>	<i>Example: By Date</i>	<i>Example: RS-xxxx</i>

**10. CHANGE HISTORY:** This table contains all changes made to a controlled document as part of and after its initial release.

\*Mark the Significant Change column of the Change History table with either:

“Y” if the revision was a material change(s) to the procedure and/or roles and responsibilities and therefore requires staff training.

“N” if the revision was only minor editorial revision(s). For example, formatting, typographical error corrections, changes to references, and other changes that do not materially change the procedure and/or roles and responsibilities.

“N/A” if the revision predates 06/05/13. Changes to the QEMS scope, procedure documentation, or templates/forms are not retroactive.

DATE	REV	*SIGNIFICANT CHANGE?	COMMENTS
<i>Example: xx-xx-xx</i>	<i>Example: A</i>	<i>Example: N/A</i>	<i>Example: Initial release of this controlled document.</i>

**11. ADDENDA:** The addenda contain any additional information related to the procedure, e.g., notes, data analyses, diagrams, illustrations, photos, spreadsheets, etc. If not applicable, indicate “None.”

*Example:  
Addendum A: New Procedure Flowchart*

