**Date last modified/updated:** Click here to enter a date. **Internal audit:** Click here to enter a date.

**Who last modified/updated:** Click here to enter text. **Management review:** Click here to enter a date.

**This part of the Navigator Playbook is completed when you have:**

1. **Ensured that your EnMS includes the documented information suggested by the guidance of the 50001 Ready Navigator for the processes implemented to this point. As you continued EnMS implementation, added the other suggested documented information.**
2. **Determined what additional documented information you needed to ensure the effectiveness of the EnMS and to demonstrate energy performance improvement.**
3. **Listed your EnMS documents, assigned document owners and document approvers, and defined the relevant document controls. Made document owners responsible for conformance with the controls for the documented information to be maintained (i.e. documents).**
4. **Listed your EnMS records, assigned record owners, and defined the relevant record controls. Made record owners responsible for conformance with the controls for documented information to be retained (i.e. records).**
5. **If your organization has existing processes for controlling documents and records, customized them as necessary to meet the documentation needs for your EnMS. If your organization has an existing records policy, made sure that the controls implemented for EnMS records are consistent with the requirements of that policy.**
6. Ensure that your EnMS includes the documented information suggested by the guidance of the 50001 Ready Navigator for the processes implemented to this point. As you continue EnMS implementation, add the other suggested documented information.

Check existing documentation

|  |  |  |
| --- | --- | --- |
| ☒ | We have included all suggested documentation | Documented in Engineering shared network folder |

1. Determine what additional documented information you need to ensure the effectiveness of the EnMS and to demonstrate energy performance improvement.

Determine any need for additional documented information

|  |  |  |
| --- | --- | --- |
| ☒ | We reviewed our documented information and considered any need for additional documentation. | Documented in Engineering shared network folder; reviewed as part of Internal Audit |

1. List your EnMS documents, assign document owners and document approvers, and define the relevant document controls. Make document owners responsible for conformance with the controls for the documented information to be maintained (i.e. documents).

Documents

|  |  |  |
| --- | --- | --- |
| ☒ | We have developed responsibilities for document control | Energy Team maintains a list of all EnMS documents, assigned document owners and approvers. Utilizing internal shared network folder to view/control version history and updates |
| ☒ | We have assigned the roles and responsibilities of document owners to qualified personnel | Documented in master list of EnMS documents |
| ☒ | Who: | Energy Team leaders & members have been assigned roles and responsibilities |

1. List your EnMS records, assign record owners, and define the relevant record controls. Make record owners responsible for conformance with the controls for documented information to be retained (i.e. records).

Records

|  |  |  |
| --- | --- | --- |
| ☒ | We have developed responsibilities for record control | Energy Team maintains a list of all EnMS records, assigned record owners and approvers. Utilizing internal shared network folder to view/control version history and updates |
| ☒ | We have assigned the roles and responsibilities of record owners to qualified personnel | Documented in master list of EnMS records |
| ☒ | Who: | Energy Team leaders & members have been assigned roles and responsibilities |
| ☒ | Records to be controlled: | Documented in master list of EnMS records |

1. If your organization has existing processes for controlling documents and records, customize them as necessary to meet the documentation needs for your EnMS. If your organization has an existing records policy, make sure that the controls implemented for EnMS records are consistent with the requirements of that policy.

Customizing existing processes

|  |  |  |
| --- | --- | --- |
| ☒ | We have determined whether we have existing processes for controlling documents and records, and customized them as necessary for our EnMS | Our processes lacked consistent record-keeping and control of documents & records. Processes have been revised to accommodate our EnMS. |
| ☒ | We have determined whether we have an existing records policy, and ensured that our EnMS records control is consistent with our policy | EnMS records policy is documented within shared network folder. |

Top Management Approval

|  |  |  |
| --- | --- | --- |
| ☐ | Date approved: | Click here to enter a date. |
| ☐ | Who approved: | Click here to enter text. |

Comments

Click here to enter text.