**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

|  |  |  |
| --- | --- | --- |
| [x]  | We have included all suggested documentation | We have completed all applicable playbooks in the 50001 Navigator up to this point. |

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

|  |  |  |
| --- | --- | --- |
| [x]  | We reviewed our documented information and considered any need for additional documentation. | This is discussed at each monthly Energy Team meeting when discussing EnMS success. |

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

|  |  |  |
| --- | --- | --- |
| [x]  | We have developed responsibilities for document control | 1. Playbook Task Worksheets
2. Opportunities Tracker
3. Energy Consumption Tracker
4. Internal Audit Records
5. Internal Communications
6. External Communications
7. Trainings
 |
| [x]  | We have assigned the roles and responsibilities of document owners to qualified personnel | 1. Energy Team Leader
2. Energy Team Identifies, Management Approves, Facility Engineers Implement and Maintain
3. Energy Team collaborates and each rep collects their appropriate data
4. Compliance Director owns and maintains
5. Communications Manager owns and updates
6. Communications Manager owns and updates
7. Energy Team Leader owns and maintains
 |
| [x]  | Who: | See above. |

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

|  |  |  |
| --- | --- | --- |
| [x]  | We have developed responsibilities for record control | Responsibilities detailed above. All applicable documents are maintained on the shared Google Drive Folder for the Energy Team |
| [x]  | We have assigned the roles and responsibilities of record owners to qualified personnel | See above. |
| [x]  | Who: | See above. |
| [x]  | Records to be controlled: | See above. |

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

|  |  |  |
| --- | --- | --- |
| [x]  | We have determined whether we have existing processes for controlling documents and records, and customized them as necessary for our EnMS | Correct, all above processes are adapted from an existing document control process. |
| [x]  | We have determined whether we have an existing records policy, and ensured that our EnMS records control is consistent with our policy | Correct, all above processes are adapted from an existing records control process. |

Comments

Click here to enter text.