**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 | We use the Playbook worksheets to ensure we document all EnMS decisions and processes. |

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. | We conduct this activity monthly in team meetings where we discuss EnMS implementation status as a larger group. |

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 | 1. Playbook Task Worksheets
2. Opportunities Tracker
3. Energy Consumption Tracker
4. Internal Audit Records
5. Internal Communications
6. External Communications
7. Trainings
 |
| [ ]  | We have assigned the roles and responsibilities of document owners to qualified personnel | 1. Energy Team Leader owns and approves, delegates completion as needed
2. Facilities Director approves, manager owns and Sustainability intern maintains
3. Sustainability Manager own and approves, intern maintains
4. Compliance liaison owns
5. Communications manager/liaison owns
6. Communications manager owns
7. Energy Team Leader owns and approves, communications manager maintains
 |
| [ ]  | Who: | Click here to enter text. |

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 | See above. We maintain records with date-version-task-item notation in virtual document sharing system |
| [ ]  | We have assigned the roles and responsibilities of record owners to qualified personnel | See above. |
| [ ]  | Who: | Click here to enter text. |

[ ]  We have developed record controls. Records should include:

1. Details on the energy review;
2. Opportunities for improving energy performance;
3. Energy baselines;
4. EnPIs;
5. Training to meet competency requirements;
6. Results of design activity to meet ISO 50001 requirements;
7. Results from monitoring and measurement of the key characteristics;
8. Calibration;
9. Results of the evaluations of compliance with legal requirements;
10. Internal audit results;
11. Corrective actions and preventive actions;
12. Management review.

Note: These are stored in other Playbook Worksheets.

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 | We are adapting the controlling processes used in our EMS |
| [ ]  | We have determined whether we have an existing records policy, and ensured that our EnMS records control is consistent with our policy | We are adapting the processes used in our EMS.  |

Top Management Approval

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

Comments

Click here to enter text.