

# QUALITY ASSURANCE PROCEDURE FOR PM JOBPLAN DEVELOPMENT AND UPDATING

## APPLICATION

**PURPOSE** - To ensure consistent quality in Operations and Maintenance (O&M) PM jobplan development and updating while applying the graded approach to maintenance.

**SCOPE** - All PM jobplans developed and updated in Maximo by or for O&M of Facilities equipment and systems for jobplans *of high significance or consequences*.

This procedure is optional for PM jobplans *of medium to low significance or consequences*.

## SPECIAL INSTRUCTIONS

The Manager of Operations and Maintenance, in coordination with the applicable ETYPE owner, shall determine the level of significance or consequences and the related formality and frequency of the jobplan development and update.

Maximo preventive maintenance jobplans consistent with pre-approved PM Procedures are required for jobplans of *high significance or consequences*. O&M jobplan development, changes, and updates of these procedures are to occur at a required frequency.

Optional or informal Maximo preventive maintenance jobplan development and updating is applied for jobplans of *medium to low significance or consequences*. Optional and less formal Maximo PM jobplan development, changes, and updates are to occur when appropriate.

To be used with all O&M Preventive Maintenance required jobplans entered and updated in Maximo.

## DEFINITIONS AND ACRONYMS

**PM JOBPLAN** - A jobplan entered into Maximo providing worksteps and other information for use in the execution of preventive maintenance workorders.

**ETYPE OWNER** - LBNL maintenance group responsible for specific equipment type. These responsibilities include those of SME, reviewer, and/or approver as determined by the Manager of Operations and Maintenance.

**SME** - Subject Matter Expert - person designated by the Manager of O&M that is experienced, knowledgeable, and proficient in safe, code-compliant, value-added preventive maintenance techniques and requirements.

**Reviewer** - The person designated by the Manager of O&M to review/validate the jobplan developed or updated by the SME for applicability, quality, content, safety, and value added.

**Approver** - The person, designated by the Manager of O&M, approving the jobplan for use.

ETYPE - Equipment Type

O&M - Operations and Maintenance.

QA - Quality Assurance.

PM - Preventive Maintenance

SME - Subject Matter Expert.

## WORK STEPS - ETYPE OWNER

1. Initiate PM jobplan development or update based on significant need, requirement, value-added or established update frequency requirements.

2. Develop and review the jobplan application, including purpose, scope, and existing related approved PM Procedures.
3. Develop a draft jobplan of clear, concise, numbered work steps consistent with related pre-approved PM procedures.
4. Review and approve as appropriate.
5. Add ETYPE owner's supervisor's initials and approval date on a new workstep.
6. Initiate and document jobplan training on new jobplans and jobplan changes.
7. PM Personnel - Implement jobplan when scheduled.
8. Monitor and review the jobplan at established frequency and ensure that it is being properly applied to only applicable equipment. Ensure that jobplans/procedures superseded or made obsolete due to the implementation or update are:
  - a) Removed from all points of use, or
  - b) Clearly marked as "obsolete" or destroyed, or
  - c) Retained and identified as for legal or knowledge preservation, or
  - d) Updated.
  - e)

**REFERENCES/REQUIREMENTS SOURCES**

1. OPER-337, Operating Procedure, PM System Change Control and Data Integrity: ETYPE OWNER Processes.

**RESPONSIBILITIES AND CONTROLS**

Provide signature lines as follows:

Rev. No.	SME/Title	Approved/Title	Date	Effective Date
1	 Mike Dong Utilities Group Leader	 Ken Fletcher Operations Department Head	3/31/2009	3/31/2009