PERFORM Centre

Standard Operating Procedure

Guidelines for preparing PERFORM Operating Documents

PC-SOP-GA-006-v01

Revision History

Version	Reason for Revision	Date
01	New Document	Jun/12/2019

1. Overview

1.1 Purpose

The PERFORM Centre is a shared facility with many different types of equipment. The intent is to have a simple PERFORM-wide documentation system that ensures proper usage and care of all equipment at PERFORM.

The content of this standard operating procedure (SOP) provides guidelines for preparing, reviewing and approving PERFORM operating documents (PODs).

1.2 Scope

- POD preparation and approval process
- Description of maintenance procedures for PODs
- Procedure for numbering PODs
- Guidelines for writing PODs

1.3 Responsibility

- PERFORM staff that are involved in writing or revising a POD need to be trained on this SOP.
- Area managers ensures that this SOP is adhered to regarding PODs.

PERFORM Centre

2. Definition of Terms and Abbreviations

Area Manager	Person responsible for all activities in a given area of PERFORM such as the athletic therapy clinic, clinical analysis laboratories, conditioning floor, etc.
Custodian	Person responsible for assigning unique code to both SOPs and PODs as well as for proper administration, distribution, filing and archiving of official copies.
PERFORM operating document (POD)	Operating documents that are specific to an instrument or technique.
Project Lead	Person responsible for all aspects of a given project at PERFORM.
Users	Person using space or equipment at the PERFORM Centre that has received adequate technical and safety training.

3. POD Preparation and Approval Process

Any information that a user would need to know before using a particular instrument at PERFORM should be included.

Table 1 provides an overview of the POD preparation and approval process.

Document Type	Content	Review period	Sign off
POD ▼ Instrument / Procedure Specific	• Proper usage • Maintenance and operational qualifications • Training • Specific health and safety concerns	Max 5 years or as needed	Author Area Manager

Table 1: POD preparation and approval process.

3.1 POD Responsibility and Approval Process

In order for a POD to take effect at PERFORM, it has to have the minimum sign off from the following individuals:
• Author

![Concordia University logo]

PERFORM Centre

- Reviewer
- Area Manager

The author is responsible for gathering all the relevant information for a particular instrument (or group of similar instruments), and preparing a clear, concise but complete POD. The POD should be understandable by a lay person who is untrained with this particular equipment. *Note: This does not mean the instrument's manual needs to be re-written*, but it should be referenced and made available to the potential user during their training.

Authors, with the help of their area manager, should also identify appropriate reviewers for the POD they are preparing.

The reviewer should be selected as subject matter expert.

The area manager is responsible for ensuring that the POD is in line with PERFORM's overall quality objectives, that it's compatible with the activities conducted in their area of responsibility and that the POD follows the general guidelines provided in this SOP.

3.2 Workflow for preparing a POD

3.2.1 Custodian

Once a POD is written and reviewed, it is passed on to the custodian for numbering. The custodian maintains a record for all PODs written at PERFORM. For new PODs, when the initial review is completed and the POD is finalized, the POD will be assigned a new POD number by the custodian.

3.2.2 POD numbering

POD numbering will comply with the following format of 5 sub-units:

PC-POD-GA-001-v01

- Where the first sub-unit (PC) identifies the PERFORM Centre ownership.
- The second sub-unit (POD) identifies type of document as being a PERFORM Operating Document
- The third sub-unit (GA) refers to the abbreviated department name for the area in which the POD will be in effect.
- The fourth sub-unit (001) refers to the chronological order of the POD starting with 001 and advancing chronologically with each new POD issued.
- The last sub-unit (v01) is the version control number.

PERFORM Centre

- Each sub-unit is separated by a dash line.

The abbreviated names for each department are as follows:

GA: General Administration	**AT**: Athletic Therapy
MF: Multi-Function Areas	**CF**: Conditioning Floor
CP: Cardio-Pulmonary	**IM**: Imaging Suite
FA: Functional Assessment	**CA**: Clinical Analysis Suite
SL: Sleep Laboratories	**NS**: Nutrition Suite

The fourth subunit will be allocated by the custodian.

3.2.3 Archiving and Disseminating PODs

The signed original of a new or revised POD will be given to the custodian who will file it in a safe place. The POD will then be made available to users online as a controlled PDF document. This version will not include the authorization page. Once each user has read and understood the new and revised POD, that user shall provide an electronic consent by clicking on the appropriate boxes.

Area managers and/or supervisors need to ensure that PODs are being followed within their area and that appropriate training is administered to users.

All PODs will be reviewed at least once every <u>five years</u>.

If a POD is no longer valid, it will be taken offline and archived. The POD number will not be used again.

3.3 Writing format for new or revised PODs

All PODs will be written according to the following guidelines:

- Use Concordia standard font Gill Sans MT size 12 font
- Where applicable, all PODs will be written in the imperative or conditional present. This means that sentences will be constructed as commands (imperative) or will be declarative conditional phrases using "will", or "shall"
- Letter sizes for titles, subtitles and text will comply with the official PERFORM Centre template
- All titles, subtitles, and text will be written in black. The only exception will be the PERFORM Centre header, and the footer, on the original authorized POD

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3.4 Sections for PODs

1. Header

 Contained in the header are:

   - On the left side: The current PERFORM Centre/Concordia University wordmark
   - On the right side: The POD reference number

2. Footer

 Contained in the footer are:
   - On the left side: the POD reference number (same as in the header)
   - The following statement in the center: "Printed copies are not controlled"
   - On the right side: page number with both current and total page numbering

3. First page

The first page must include the following information
   - Document type (ie: POD)
   - POD Title
   - POD number
   - Revision History: This should be presented as a table containing the latest version number, reasons for revision with a brief description of the changes made, and the date that the POD was signed off and put into effect.

4. Main body of the POD

This is left to the author's best judgment with the only guideline being that PODs should be prepared so that they can be understood by a lay person. Topics covered can include but are not limited to:

   - Specific health and safety considerations and needs for the equipment that the POD refers to
   - Training requirements
   - Local practice regarding a certain equipment as a shared facility

Note: Templates PODs are made available in word format on the BookR.