

SCHOOL OF HEALTH

Standard Operating Procedure

Guidelines for preparing PERFORM Operating Documents

PC-SOP-GA-006-v02

Revision History

Version	Reason for Revision	Date
02	To reflect that the PC building is now managed by the School of Health.	Jul/25/2025

1. Overview

1.1 Purpose

The PC Building is a shared facility, managed by the School of Health (SOH) that houses many different types of equipment. The intent is to have a simple documentation system that ensures proper usage and care of all equipment housed in the building.

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
- Procedure for numbering PODs
- Guidelines for writing PODs
- Description of maintenance procedures for PODs

1.3 Responsibility

- Staff that are involved in writing or revising a POD need to be trained on this SOP.
- The Associate Dean, Research and Infrastructure ensures that this SOP is adhered to regarding PODs.

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2. Definition of Terms and Abbreviations

BookR	Term referring to the booking system for the SoH.
PERFORM operating document (POD)	Operating documents that are specific to an instrument or technique.
Project Lead	Principle Investigator (PI; faculty) responsible for all aspects of a given project being carried out within the PC building
Users	Person who is using space or equipment in the PC building that has received adequate technical and safety training.

3. POD Preparation and workflow

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

Table 1 provides an overview of the POD preparation and workflow.


Document Type	Content	Review period	Sign off
POD  Instrument / Procedure Specific	<ul style="list-style-type: none"> • Proper usage • Maintenance and operational qualifications • Training • Specific health and safety concerns 	Max 5 years or as needed	Author Reviewer Associate Dean, Research & Infrastructure

Table 1: POD preparation and workflow.

3.1 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 building location.
- The second sub-unit (POD) identifies type of document as being a Platform Operating Document

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- The third sub-unit (GA) refers to the abbreviated Platform or 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 fourth sub-unit will be allocated by the Lead, Research Operations/relevant staff person.
- The last sub-unit (v01) is the version control number.
- Each sub-unit is separated by a dash line.

The abbreviated names for each Platform or relevant area are as follows:

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

3.2 Writing format for new or revised PODs

All new PODs should be created using the School of Health POD template.

- 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”.

3.3 Sections for PODs**1. Header**

Contained in the header are:

- On the left side: Concordia University School of Health logo
- 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 (do not include the sign off page)

SCHOOL OF HEALTH**3. First page**

The first page includes 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 unique to each instrument or collection of instruments, and should be prepared so that they can be understood by a lay person. Topics covered can include but are not limited to:

- Training requirements.
- Specific guidelines for the safe use of equipment or procedures.
- Policy for adhering to schedules and being respectful of other users.
- Proper disposal of consumables and/or cleaning areas after use.
- Emergency response and contact information.

3.4 *POD Responsibility and Approval Process*

In order for a POD to take effect, it must be signed by the following individuals:

- Author
- Reviewer
- Associate Dean, Research and Infrastructure

The Author is responsible for gathering all the relevant information for the safe use of a particular instrument (or group of similar instruments), and preparing a clear, concise and complete POD. The POD should be understandable by a lay person. *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. When relevant, authors should consult with their Manager for the POD they are preparing.

The Reviewer of the POD can be the Manager and/or a relevant subject matter expert.

The Associate Dean, Research & Infrastructure is responsible for ensuring that the POD follows the general guidelines provided in this SOP and that it provides sufficient information to ensure the safe use of infrastructure.

SCHOOL OF HEALTH**3.5 *Disseminating and Archiving PODs***

Once a POD is written and/or reviewed, it is passed on to the Lead, Research Operations for numbering and/or dissemination. The Lead, Research Operations maintains a record for all PODs written. The POD will be made available to users as a PDF document. This version will not include the authorization page.

Staff 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 five years.

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

Note: POD Templates are made available on the BookR at:

<https://schoolofhealth.concordia.ca/BookR/reference.asp>