



# Property Risk Consulting Guidelines

XL Risk Consulting

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PRC.1.0.2.3

## REQUEST FOR CHANGE FORMS

### INTRODUCTION

PRC.1.0.2, which describes Management of Change (MOC), contains a requirement to set up a procedure for the generation and handling of the documentation. The documentation is a formal written request for permission to change a process, procedure, piece of equipment, personnel, etc. commonly called a Request for Change (RFC). The process flow for handling the RFC is described in PRC.1.0.2.2, Processing Requests for Change. This section covers the various formats for the forms themselves.

### POSITION

Design, as part of an MOC system, an RFC form appropriate to the facility.

### DISCUSSION

Three sample RFC forms of varying complexity are shown. Each of these forms requires a corresponding procedure. The sample forms are provided here to illustrate the variety of approaches that might be appropriate for a given facility.

<p>Change description and rationale:</p>	<p>Date:</p>
<p>If the change is temporary, list the pertinent dates. Dates valid:</p> <p>_____</p>	
<p>Originator</p>	
<p>This change has met the appropriate review requirements and has been approved. Safety, health and environmental concerns have been addressed, procedures have been revised, the appropriate training and/or communication activities have occurred, and all affected process safety information is being updated.</p>	
<p>_____</p>	
<p>RFC Authorizer</p>	

Figure 1. Simple MOC Form.

Unit or Area: \_\_\_\_\_ RFC No.: \_\_\_\_\_

Description and reason for change: \_\_\_\_\_ Date: \_\_\_\_\_

  

\_\_\_\_\_  
 Originator  
 Temporary Change      Removal Date: \_\_\_\_\_

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Environmental, health and safety reviews are complete and all concerns have been addressed,

  

\_\_\_\_\_  
 EH&S Review Team Leader

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Operating, maintenance and emergency procedures have been reviewed.

  

\_\_\_\_\_  
 Area Procedures Coordinator

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All affected personnel have been informed of the change. The appropriate training has taken place.

  

\_\_\_\_\_  
 Area Training Coordinator

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All affected process safety information is scheduled for revision.

  

\_\_\_\_\_  
 Unit Engineer

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PSSR Required      PSSR No.: \_\_\_\_\_

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This change has met the appropriate review requirements and has been approved.

  

\_\_\_\_\_  
 Area Manager

Figure 2. Typical MOC Form.

### REQUEST FOR CHANGE FORM

Standard Change \_\_\_\_\_ RFC No. \_\_\_\_\_  
 Emergency Change \_\_\_\_\_ Date Requested \_\_\_\_\_  
 Temporary Change \_\_\_\_\_ Date Required \_\_\_\_\_  
 Unit \_\_\_\_\_ System or Equipment \_\_\_\_\_  
 Description (include technical basis for change): \_\_\_\_\_  
 Originator \_\_\_\_\_

1. Temporary Changes (skip for permanent changes). "This information may be provided in a temporary procedure (attach copy)"

Why is this designated a temporary change?  
 Additional precautions required:  
 Contingency plan:  
 Date valid:  
 Person responsible for removing the change: \_\_\_\_\_

**II. Safety, Health, and Environmental Reviews**

	Req'd (Y/N)	Responsible Party	Target Date	Date Complete*	Initials
Process Safety (specify method)	Y				
Occupational Safety/Industrial Hygiene					
Environmental Review(s)					

\*Complete - Action items with immediate impact are resolved and plan is in place to address long range items.

**III. Procedures Revised**

	Req'd (Y/N)	Responsible Party	Target Date	Date Complete**	Initials
Startup/Shutdown/Emergency Shutdown					
Normal Operation					
Maintenance					
Emergency Response					
Other (e.g., administrative) _____					

\*\*Complete - Revised procedures issued; any obsolete procedures discarded.

Figure 3. Complex MOC Form Including Checklists.

IV. Training

	Req'd (Y/N)	Individuals or Groups to be trained	Responsible Party	Date Assigned	Date Complete	Initials
Operations						
Maintenance						
Contractor						
Other _____						

\*Complete - All specified personnel have received and understood training. Responsibility for any change to permanent training materials (e.g., learning blocks) is assigned and scheduled.

V. Process Safety Information Revised

	Req'd (Y/N)	Responsible Party	Date Assigned	Target Date	Initials
P&ID					
Process Flow Diagram					
Electrical System Documentation					
Relief System Documentation					
Spare Parts List					
MSDS					
Documented Operating Limits-tits					
Other _____					

Complete if there are any Yes responses:

Follow-up Responsibility \_\_\_\_\_

PSSR Responsibility \_\_\_\_\_

PSSR No. \_\_\_\_\_

VI. Authorization

This change has met the appropriate review requirements and has been approved.

\_\_\_\_\_  
Area Operations Manager

\_\_\_\_\_  
Area Engineering Manager

VII. Close-out Review

All of the indicated process safety information revisions (Section V) have been completed. This MOC action is complete.

Figure 3. (Con't.) Complex MOC Form Including Checklists.