**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 SEEC Navigator Playbook is completed when you have:**

1. **Ensured that your EnMS includes the documented information suggested by the guidance of the SEEC 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 SEEC 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 | Click here to enter text. |

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. | Click here to enter text. |

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 | Click here to enter text. |
| [ ]  | We have assigned the roles and responsibilities of document owners to qualified personnel | Click here to enter text. |
| [ ]  | 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 | Click here to enter text. |
| [ ]  | We have assigned the roles and responsibilities of record owners to qualified personnel | Click here to enter text. |
| [ ]  | 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 | Click here to enter text. |
| [ ]  | We have determined whether we have an existing records policy, and ensured that our EnMS records control is consistent with our policy | Click here to enter text. |

**Top Management Approval**

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

**Comments**

Click here to enter text.

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