

Management of Change (MOC)

One form for ONE change to a process, plant, equipment, chemical, software, procedure or organisation that is not a like-for-like replacement, filled in before the change is made and kept until it is closed: why, the risk before and after, who approved it (and that an approver was independent of the requester), who was told and trained, the review before the change goes live, the checks after it and, for a temporary change, its time limit and the check that everything went back. Sections 1 to 7 are modelled on the considerations listed in 29 CFR 1910.119(l) and the pre-startup review in (i); the independence rule, the extension rule, the 30, 90 and 180 day checks and the return-to-original check are this form's own and are marked as such. It supplies no limit, risk scale or authority level: write the ones your own procedure sets. Nothing here is legal advice.

Record	How it differs from this form
Permit to work	A permit controls one job on the plant as it stands (hot work, entry, isolation) for a limited time. This form decides whether the plant, process, procedure or organisation may be changed. Both can be open together: write the permit number in section 1.
Safety device bypass record	Records ONE bypass, override or impairment of ONE safety-critical device, with its own authoriser and restoration check (qhsetech.com/templates/safety-device-bypass-record-template). It is not a management of change. A bypass that is long, repeated or has no end date is a change and belongs on this form; write the bypass record number in section 1.

1 Change description

MOC reference #	Requestor (name, role)	Date raised	Site, area or unit
Change type ☐ Temporary ☐ Permanent ☐ Emergency		If emergency: why it could not wait, and who authorised it (every consideration is still recorded)	
What is changing ☐ Equipment or plant ☐ Process, chemical or set point ☐ Software or control logic ☐ Operating or maintenance procedure ☐ Organisation (roles, staffing, contractors) ☐ Other			
Is this a replacement in kind? ☐ Yes: same design specification ☐ No		Who confirmed it, and against what (drawing, specification)	
Scope (what / why)			
Technical basis for the change (why it will work, and what it was checked against)			
Related permit(s) to work (numbers)		Related safety device bypass record (number)	

2 Temporary change: time limit and return to original

Planned end of the temporary change (date)	Time limit (days)	Maximum your own procedure allows (days; the form supplies none)	Planned end inside the maximum? ☐ Yes ☐ No	
Original condition to return to (drawing, specification, set point or procedure, with revision)			Who will check it was restored (name, role)	
Extension	New planned end	Reason the change cannot end on time	Re-approved by (not the requester)	Date

Form's own rule: an extension is a new decision, made and signed on this form before the old end date passes; a change that outlives its end date without it is overdue, and a temporary change to be kept for good is a new request for a permanent one. Mark this section N/A for a permanent change.

3 Risk evaluation

	Pre-change	Post-change (end state)	During the transition (half-changed)
Likelihood (1-5)			
Severity (1-5)			
Risk score			
Acceptable?			
Scale used (your own, for example the 5 x 5 risk assessment matrix)		Controls or limits that make the post-change score acceptable	
Other analysis done (HAZOP, JSA, what-if) and where it is filed			

4 Stakeholder review and approval

Function	Name (write 'deputy for' if the holder is away)	Approve / Reject	Signature	Date
Operations				
EHS				
Engineering				
Maintenance				
Operations Manager				

Independent of the requester? ☐ Yes, the rule below is met ☐ No, so the approval is not complete	Name of the independent approver	Conditions the approvers set
Authority level your procedure requires for this change (reference)	Approved to start on (date)	

Form's own rule (not taken from a law or a standard): the requester does not approve their own change; at least one approver is independent of it, meaning not in the requester's reporting line for this decision and not someone who designed it or will carry it out; nobody signs for another function (a deputy signs under their own name); approvals are written on this form, with a date, before the change starts, and any rejection stops it until it is resubmitted. Your own procedure may be stricter.

5 Training and communication

Audience (operators, maintenance, contractors, other shifts, emergency team)	Method	Owner	Completion date	Confirmed (initials)

Who was consulted before the change (including contractors and workers' representatives), and what they raised

6 Implementation plan

Documents this change makes out of date (tick, and give each a line in the plan)

☐ Process safety information or drawings (P&IDs)
 ☐ Operating procedures
 ☐ Maintenance procedures
 ☐ Inspection and test plans
☐ Electrical classification
 ☐ Emergency plan
 ☐ Training material
 ☐ Risk assessments
 ☐ Other

Phase	Activity	Owner	Start	Finish

7 Pre-startup review: before the change goes live

Check	Done (Y / N / N/A)	By (initials)	Date
Equipment, piping or software built or installed as the drawing or specification says, and checked on site			
Safety, operating, maintenance and emergency procedures are in place and adequate for the changed plant			
Everyone affected has been told and trained (section 5), including contractors and other shifts			
Drawings, procedures and other documents updated or marked up (section 6)			
Safety devices and alarms in service, or each bypass has its own open record (number in section 1)			
Temporary change: end date set and diarised, and the return to original is a line in the plan			
Conditions set by the approvers (section 4) are met			

Review done by (not the requester)	Cleared to start by (authorised person)	Date and time cleared
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The first four checks follow what paragraph (i) of the US process safety rule lists for a pre-startup safety review; the others are the form's own. Not every change needs a formal review: your own procedure says which do.

8 Verification at 30, 90 and 180 days

Milestone	Verifier	Date	Works as intended? (Y / N)	Findings
30 days				
90 days				
180 days				

The 30, 90 and 180 day checks are this form's own convention. For a temporary change that has been reversed, write N/A and the date it was reversed.

Action arising from a check, a finding or the closure review	Owner	Due	Done on	Checked by

9 Return to original check

Original condition restored? ☐ Yes ☐ No: the change stays open ☐ N/A: permanent change		Restored on (date)	Restored by (name)
Checked and tested after restoration (method and result) _____ _____ _____		Checked by (not the person who restored it) _____ _____ _____	
Mark-ups and temporary drawings removed or made permanent, and everyone told? ☐ Yes ☐ No		Actual end date, and days against the time limit _____	

10 Closure

Closure checks (tick) ☐ Every action in the plan is done ☐ Documents updated ☐ Training complete ☐ Verification done or marked N/A with the reason ☐ No condition is open ☐ No temporary change is still installed or past its end date			
Lessons learned _____ _____ _____			
Closed by (name, role)	Signature	Date closed	Closure checked by (not the requester)
Where this record is kept, and for how long (your own rule) _____			