

Notification Triggers and Email Contents: Management of Change (MOC)

Updated: 12.5.2024

©2024 VelocityEHS

Contents

Overview.....	2
Immediate Notifications.....	2
Submit for concept approval	2
Revision needed	3
Design approval required	4
Implementation approval required	5
Pre-startup review required	6
Approval for startup	7
Ready for closure	7
Rejected	8
Closed	8
Permanent review required	9
Permanent request rejected	9
Extension requested.....	10
Extension approved.....	10
Extension denied.....	11
Concept approval reassigned	11
Responsibility changed for design approval	12
Responsibility changed for implementation approval	13
Pre-startup review reassigned.....	13
Implementer reassigned	14
Reminder Notifications	14
Expiration reminder	14
No activity	15

Overview

This document lists the available VelocityEHS notification triggers for **Management of Change (MOC)**, along with the email content generated for each trigger. Administrators can use this document during notification setup to understand what a given notification will consist of.

Words surrounded by angular brackets (<>) are tags. Tags will be replaced with record-specific content when each notification is generated.

Immediate Notifications

Submit for concept approval

Sent when the status advances to Concept Approval.

Content conditions:

1. If Emergency, and no previous Concept Revision status
2. If previous Concept Revision status
3. If Temporary/Emergency

Subject: <Category> <Types> change request submitted at <Location>

The following <Category> <Types> change request requires concept approval by <Person Responsible for Concept Approval>.

(See condition 1: This change was approved and implemented on an emergency basis and now requires a full review.)

(See condition 2: <Last Reverted By> requested revisions for the following reason: <Revert Reason>. It is currently undergoing a new round of review and approval.)

During concept approval, the change must be reviewed and the following responsibilities identified: Designers, Approvers, Responsible for Pre-Startup Review, and Implementer.

<MOC Number Link>: <MOC Title Link>

Initiated By: <Initiator>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition 3: Expiration Date: <Expiration Date>)

Revision needed

Sent when the status becomes Concept Revision.

Content condition: If Temporary/Emergency

Subject: <Category> <Types> change request at <Location> requires concept revision

<Last Reverted By> requested revisions for the following reason: <Revert Reason>. This change request needs to be resubmitted by <Responsible for Concept Revision> after revisions are made.

[<MOC Number Link>](#): [<MOC Title Link>](#)

Initiated By: <Initiator>

<Role Responsible for Concept Approval>: <Person Responsible for Concept Approval>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition: Expiration Date: [<Expiration Date>](#))

Design approval required

Sent when the next member of the Design Group becomes Currently Responsible.

Content conditions:

1. If the status of the change request has not changed between the current approval round and the previous approval round for the same designer
2. If Emergency, and no previous Concept Revision status
3. If Permanent, and previous Temporary/Emergency category
4. If previous Concept Revision status
5. If Temporary/Emergency

Subject: <Category> <Types> change request at <Location> requires design approval

(See condition 1: A designer approved this <Category> <Types> change request with the following changes: <Approval Comment>.)

(See condition 2: This <Category> <Types> change request was approved and implemented on an emergency basis and now requires a full review.)

(See condition 3: The following <Category> <Types> change request was approved and implemented on a temporary basis and is now undergoing approval to be made permanent.)

(See condition 4: <Last Reverted By> requested revisions to this <Category> <Types> change request for the following reason: <Revert Reason>. It is currently undergoing a new round of review and approval.)

The design must be reviewed for approval, with changes if necessary, by the current designer, <Current Designer>. All other designers whose subsequent review and approval are required will be notified when they become responsible.

<MOC Number Link>: <MOC Title Link>

Initiated By: <Initiator>

<Role Responsible for Concept Approval>: <Person Responsible for Concept Approval>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition 5: Expiration Date: <Expiration Date>)

Implementation approval required

Sent when the status becomes Implementation Approval.

Content conditions:

1. If Emergency, and no previous Concept Revision status
2. If Permanent, and previous Temporary/Emergency category
3. If previous Concept Revision status
4. If Temporary/Emergency

Subject: <Category> <Types> change request at <Location> requires implementation approval

The following <Category> <Types> change request is ready for implementation approval, which is the responsibility of <Currently Responsible Approver(s)>.

(See condition 1: This change was approved and implemented on an emergency basis and now requires a full review.)

(See condition 2: This change was approved and implemented on a temporary basis and is now undergoing approval to be made permanent.)

(See condition 3: <Last Reverted By> requested revisions for the following reason: <Revert Reason>. It is currently undergoing a new round of review and approval.)

Approvers are required to review the change request and provide approval if appropriate.

<MOC Number Link>: <MOC Title Link>

Initiated By: <Initiator>

<Role Responsible for Concept Approval>: <Person Responsible for Concept Approval>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition 4: Expiration Date: <Expiration Date>)

Pre-startup review required

Sent when the status advances to Pre-Startup Review.

Content conditions:

1. If Emergency, and no previous Concept Revision or Temporary Implementation status
2. If Temporary/Emergency, and previous Temporary Implementation status
3. If Permanent, and previous Temporary/Emergency category
4. If previous Concept Revision status
5. If Temporary/Emergency

Subject: Pre-startup review required on <Category> <Types> change request at <Location>

The following <Category> <Types> change request requires pre-startup review, which is the responsibility of <Person Responsible for Pre-Startup Review>.

(See condition 1: This change was approved and implemented on an emergency basis and is now undergoing a detailed review and approval.)

(See condition 2: This change was approved and implemented on a temporary basis and is now being reverted.)

(See condition 3: This change was approved and implemented on a temporary basis and is now undergoing approval to be made permanent.)

(See condition 4: <Last Reverted By> requested revisions for the following reason: <Revert Reason>. It is currently undergoing a new round of review and approval.)

The change request must be reviewed and the PSSR checklist completed.

<MOC Number Link>: <MOC Title Link>

Initiated By: <Initiator>

<Role Responsible for Concept Approval>: <Person Responsible for Concept Approval>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition 5: Expiration Date: <Expiration Date>)

Approval for startup

Sent when the status advances to Approved for Startup.

Content conditions:

1. If not Emergency
2. If Temporary/Emergency

Subject: <Category> <Types> change request at <Location> is approved for startup

<Implementer> is the Implementer for this <Category> <Types> change request. There are no incomplete pre-startup action items, therefore the Implementer is required to accept implementation after verifying startup requirements are met.

(See condition 1: The implementer will then be required to complete the post-startup checklist.)

<MOC Number Link>: <MOC Title Link>

Initiated By: <Initiator>

<Role Responsible for Concept Approval>: <Person Responsible for Concept Approval>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition 2: Expiration Date: <Expiration Date>)

Ready for closure

Sent when the status advances to Pending Approval to Close.

Subject: <Category> <Types> change request at <Location> is ready for closure

There are no incomplete action items for the following <Category> <Types> change request. Final closure is required by <Person Responsible for Closure>.

<MOC Number Link>: <MOC Title Link>

Initiated By: <Initiator>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

Rejected

Sent when the status becomes Rejected.

Content conditions:

1. If no deleted action items in status Open
2. If any deleted action items in status Open

Subject: <Category> <Types> change request at <Location> was rejected

The following <Category> <Types> change request was rejected by <Rejected By> for the following reason: <Reason Provided>.

<MOC Number Link>: <MOC Title Link>

Initiated By: <Initiator>

Initiation Date: <Initiation Date>

<Filter>

(See condition 1: This change request has no outstanding action items.)

(See condition 2: The following outstanding action items associated with this change request have been deleted.)

<Action Item Number Link>: <Action Item Title Link>

<Action Item Number Link>: <Action Item Title Link>

Closed

Sent when the status advances to Closed.

Subject: <Category> <Types> change request at <Location> has been closed

The following <Category> <Types> change request has been closed.

<MOC Number Link>: <MOC Title Link>

Initiated By: <Initiator>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

Permanent review required

Sent when the status advances to Permanent Review.

Subject: <Category> <Types> change request at <Location> requires approval to be made permanent

<Requested By> has requested to make this change request permanent for the following reason: <Reason Provided>. If <Person Responsible for Permanent Review> approves, this change must go back through the implementation review, approval and acceptance process. Otherwise, the change will need to undergo approval on an extension or be reverted.

[<MOC Number Link>](#): [<MOC Title Link>](#)

Initiated By: <Initiator>

<Role Responsible for Concept Approval>: <Person Responsible for Concept Approval>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

Expiration Date: <Expiration Date>

Permanent request rejected

Sent when the change request becomes Temporary Implementation, and the previous status was Permanent Review.

Subject: Permanent request rejected on <Category> <Types> change request at <Location>

<Rejected By> has rejected the request to make this change permanent for the following reason: <Reason Provided>. This change must now be reverted to its original condition, which is the responsibility of <Implementer>.

[<MOC Number Link>](#): [<MOC Title Link>](#)

Initiated By: <Initiator>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

Expiration Date: <Expiration Date>

Extension requested

Sent when the status advances to Extension Approval.

Subject: Extension requested for <Category> <Types> change request at <Location>

<Requested By> has requested extension on the following <Category> <Types> change request from <Expiration Date> to <Revised Expiration Date> for the following reason: <Reason Provided>. <Person Responsible for Extension Approval> must review and grant or deny the request.

[<MOC Number Link>](#): [<MOC Title Link>](#)

Initiated By: <Initiator>

<Role Responsible for Concept Approval>: <Person Responsible for Concept Approval>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

Extension approved

Sent when the change request status goes from Extension Approval back to Temporary Implementation AND last extension request was approved.

Subject: Extension approved for <Category> <Types> change request at <Location>

<Approved By> has approved the request to extend the Expiration Date on the following <Category> <Types> change request to <Expiration Date>.

[<MOC Number Link>](#): [<MOC Title Link>](#)

Initiated By: <Initiator>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

Extension denied

Sent when the change request status goes from Extension Approval back to Temporary Implementation AND last extension request was denied.

Subject: Extension denied for <Category> <Types> change request at <Location>

<Rejected By> has denied the request for an extension to this <Category> <Types> change request for the following reason: <Reason Provided>. <Implementer> must take steps to either revert the change, or request approval to make the change permanent.

[<MOC Number Link>](#): [<MOC Title Link>](#)

Initiated By: <Initiator>

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

Expiration Date: <Expiration Date>

Concept approval reassigned

Sent if the MOC Coordinator role is reassigned when it is the role responsible for the current change request state. When recipient role assigned = MOC Coordinator, the distribution will include both the old responsible and the new responsible persons.

Content condition: If Temporary/Emergency

Subject: Reassignment of concept approval of <Category> <Types> change request at <Location>

Responsibility for concept approval on the following <Category> <Types> change request has been reassigned from <Old Responsible> to <New Responsible>.

[<MOC Number Link>](#): [<MOC Title Link>](#)

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition: [Expiration Date: <Expiration Date>](#))

Responsibility changed for design approval

Sent if the Design Group is modified when it is the role responsible for the current change request state. When recipient role assigned = Design Group, the distribution will include both the old responsible and the new responsible persons.

Content condition: If Temporary/Emergency

Subject: Change in responsibility for design approval of <Category> <Types> change request at <Location>

Design approval responsibility on the following <Category> <Types> change request has been modified.

Persons added to the Design Group: <Persons Added>

Persons removed from the Design Group: <Persons Removed>

[<MOC Number Link>](#): [<MOC Title Link>](#)

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition: [Expiration Date: <Expiration Date>](#))

Responsibility changed for implementation approval

Sent if the Approval Group is modified when it is the role responsible for the current change request state. When recipient role assigned = Approval Group, the distribution will include both the old responsible and the new responsible persons.

Content condition: If Temporary/Emergency

Subject: Change in responsibility for implementation approval of <Category> <Types> change request at <Location>

Implementation approval responsibility on the following <Category> <Types> change request has been modified.

Persons added to the Approval Group: <Persons Added>

Persons removed from the Approval Group: <Persons Removed>

[<MOC Number Link>](#): [<MOC Title Link>](#)

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition: [Expiration Date: <Expiration Date>](#))

Pre-startup review reassigned

Sent if the Responsible for Pre-Startup Review role is reassigned when it is the role responsible for the current change request state. When recipient role assigned = Responsible for Pre-Startup Review, the distribution will include both the old responsible and the new responsible persons.

Content condition: If Temporary/Emergency

Subject: Pre-startup review reassigned on <Category> <Types> change request at <Location>

Responsibility for pre-startup review on the following <Category> <Types> change request has been reassigned from <Old Responsible> to <New Responsible>.

[<MOC Number Link>](#): [<MOC Title Link>](#)

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition: [Expiration Date: <Expiration Date>](#))

Implementer reassigned

Sent if the Implementer role is reassigned when it is the role responsible for the current change request state. When recipient role assigned = Implementer, the distribution will include both the old responsible and the new responsible persons.

Content condition: If Temporary/Emergency

Subject: Implementer reassigned on <Category> <Types> change request at <Location>

The Implementer on the following <Category> <Types> change request has been reassigned from <Old Responsible> to <New Responsible>.

[<MOC Number Link>](#): [<MOC Title Link>](#)

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

(See condition: Expiration Date: [<Expiration Date>](#))

Reminder Notifications

Expiration reminder

Sent on temporary (emergency) change requests that are still open X days before the expiration date.

Subject: Expiration date approaching on <Category> <Types> change request at <Location>

The following <Category> <Types> change request expires on <Expiration Date>. <Implementer> must take steps to revert the temporary change by this date, request an extension, or request approval to make the change permanent.

[<MOC Number Link>](#): [<MOC Title Link>](#)

Initiation Date: <Initiation Date>

Target Completion Date: <Target Completion Date>

No activity

Sent on open change requests that are not updated in X days.

Content condition: If Temporary/Emergency

Subject: Inactivity notification for <Category> <Types> change request at <Location>

The following <Category> <Types> change request initiated by <Initiator> on <Initiation Date> has not been updated in <DaysNoActivity> days.

[<MOC Number Link>](#): [<MOC Title Link>](#)

Target Completion Date: <Target Completion Date>

(See condition: Expiration Date: [<Expiration Date>](#))