

# Advanced Photon Source

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## PSC Plan of the Week / Plan of the Day Process

### Section where used:

### Changes made in this revision:

- Updated Emergent work process
- Updated Injector Complex Area Coordinator
- Updated Plan of the Week meeting agenda
- Section 2.1
  - Step 3 - Clarified who is doing the work.
  - Step 9 - Clarified it is the APS-U Director and PSC DALD who approve the POW before it is posted.
  - Step 11- Revised to describe current practice.
- Section 3
  - Updated Maintenance Shutdown Planning Coordinator and Technical Facilities and Systems Specialist roles.

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## PSC Plan of the Week / Plan of the Day Process

### 1. INTRODUCTION

The control of the performance of work activities is recognized as part of the overall integrated work management and conduct of operations processes. These processes are used to plan and coordinate work activities performed in the PSC Directorate and where PSC personnel are performing work.

The Plan of the Week (POW) and Plan of the Day (POD) process aids in the planning and scheduling of operations, project, and user non-experimental activities. This process is intended to assist the groups within the PSC Directorate with integrating scheduling and planning with the integrated safety management (ISM) process. The POW process is a management tool that serves as a mechanism for assigning resources and scheduling work. Requirements for the approval and release of work are defined by the work planning and control process.

#### 1.1. Purpose

The POW process will be used to schedule and coordinate work activities within PSC facilities during the “dark period”, when beam from the APS will not be provided to beamlines for research. Note the length of time that plan of the week process is in place may be extended or shortened by the Deputy ALD for Operations as needed. The process takes into consideration the [APS 1180311](#), Conduct of Operations Manual for the APS Main Control Room, [APS 2213451](#) Conduct of Operations Manual, APS User Experimental Facilities Operations Group, as well as [APS 2188852](#), APS Maintenance Shutdown Planning while utilizing [APS 1432773](#), APS Work Planning and Control (WPC) work control document, approval, and authorization requirements. The plan of the week is the process that provides a formal mechanism for scheduling and coordinating all PSC supported facility maintenance, construction, operational activities, other work activities, and site/facility visits that have the potential to interact with or affect APS operations.

This procedure applies to all work activities taking place in, or directly impacting, PSC-supported facilities (i.e., APS storage ring and mezzanine, the APS mechanical mezzanine, the APS experiment hall floor, and the APS injector complex). This includes work activities performed by groups other than PSC Directorate in PSC facilities as well as work activities conducted by support service contractors. This procedure does not include work performed in auxiliary support facilities (e.g., Building 981, Building 382 etc.) when those work activities do not directly impact the work within the PSC-supported facilities unless specifically requested by PSC Management.

## 1.2. Scope

This procedure applies to the following Argonne activities and entities.

**Organizations:** Photon Sciences Directorate and subcontractors or others working directly for PSC or within or affecting PSC activities

**Buildings and Locations:** PSC-supported facilities (i.e., APS storage ring and mezzanine, the APS mechanical mezzanine, the APS experiment hall floor, and the APS injector complex) and any other buildings and facilities occupied by PSC or buildings and facilities where work activities will be performed by PSC personnel when specifically requested by PSC Management.

**Other applicability factors:** None

**Exclusions from the above criteria:**

- This procedure does not apply to experimental activities which follow the APS Experiment Safety Reviews, [APS 1187022](#), process.
- Emergency response initiated by the Incident Commander.
- Abnormal events requiring immediate actions to establish a safe configuration to protect the health and wellbeing of workers, the public, and the environment.
- The following activities if conducted outside of established work areas and not directly supporting the work evolution:
  - photography, videography in office and meeting areas, and handling of boxed records and media products.
- Janitorial services in offices and non-construction area common spaces (e.g., lunchroom) performed by other than PSC staff.
- Office work, office equipment maintenance by Lab contractor

## 1.3. Applicability and Scope

All work activities conducted in PSC facilities must be approved, authorized, and scheduled in accordance with the POD/POW process described in this procedure where applicable and the included references.

Work activities defined in this procedure **may** include, but are not limited to:

- Contractor Services as defined in [APS\\_1432773](#), APS Work Planning and Control (WPC)
- Facility Technical Tasks Contractor Services as defined in [APS\\_1432773](#), APS Work Planning and Control (WPC), this includes Collaborative Access Team (CAT) non-experimental work activities.
- Construction
- Removal and Installation of equipment
- Proposed operations and project activities required to be completed before the shutdown ends.
- Scheduled audits, assessments, and high-level tours
- Infrastructure Services work activities including subcontractor activities.
- Preventive maintenance and corrective maintenance
- Surveillances, testing, and inspections
- Emergent work, defined as work that the scope and hazards vary from previously approved work that requires additional work control document(s), JSA(s), approval and authorization or previously unplanned work that needs to immediately commence.

Organizations requesting to conduct work activities covered by this procedure must input their work into the PSC POW process as described in Section 2.1. POW meetings will include the following: Storage Ring and Mezzanine Removal and Installation Coordinator, Beamline Coordinator, Injector Complex Coordinator with management representatives from the following: AES, ASD, XSD, APSU, PSC-Safety, EFOG and Infrastructure Services-Site Operations. Other organizations may attend the meeting if they have work on the POW or for safety, oversight, or information purposes. It is strongly encouraged to have attendance at the POD and POW meetings to facilitate an integrated dialogue to adequately schedule and coordinate work activities.

## 1.4. References

[APS\\_1180311](#), Conduct of Operations Manual for the APS Main Control Room  
[APS\\_2188852](#), APS Maintenance Shutdown Planning

[APS\\_1432773](#), APS Work Planning and Control (WPC)  
[APS\\_1187022](#), APS Experiment Safety Reviews  
[APS\\_1410423](#), Contractor and Construction Services  
[APS\\_2213451](#), Conduct of Operations Manual, APS User Experimental Facilities  
Operations Group

## 2. PROCESS

### 2.1. Plan of the Week

1. Work groups use one of the following to enter or update a work request **by 2:00 pm on Tuesday for work the following week:**
  - a. A work request via the [APS work request system](#) OR
  - b. Coordinating with APS-U Project Management to include work on the [APS-U POW](#)
2. Work is reviewed and approved by the appropriate area coordinator.
  - a. Area Coordinators are the following:
    - i. Storage Ring/Mezzanine Removal and Installation Coordinator: **Mark Erdmann**
    - ii. Beamline Coordinator: **Robert Winarski**
    - iii. Injector complex coordinator: **Greg Fystro**
3. POW is generated from the above inputs by the Technical Facilities and System Specialist by 8:00 am on Wednesdays.
  - a. The plan of the week will display work for the next two weeks and status of the work.
  - b. POW fields:
    - i. Work description, Project Area or Operational Group, Location, Sector, Procedure/WCD/JSA, Responsible Division, Responsible Manager, Responsible Individual, Pre-job brief required, Requestor, dates to be performed, RSS component, WCD approved, Workers/Work Authorized, Added to MAT, Hazard level, reference number, comments
    - ii. [Example plan of the week](#).
4. Maintenance shutdown planning coordinator (or designee) reviews with Operations groups and non APSU CAT requests (as defined in the APS Maintenance Shutdown Planning) and ESH coordinators for deconfliction of work, areas, access, WCDs in place, etc. and approval by area coordinator on Wednesdays at the PSC shutdown planning meeting.
5. APSU work scope will be reviewed similar to step 3 above with the APSU team.
6. PSC Operations and APSU will provide their input to the POW to the Technical Facilities and System Specialist by noon on Wednesdays.
7. Technical Facilities and System Specialist provides a combined POW to team described in section 1.3 above for review by 10:00 am on Thursdays.

8. POW meeting held on typically on Thursdays at 2:30, to review plan of the week and work for next two weeks. The meeting is co-chaired by the PSC DALD for Operations and the APS-U Project Director.
  - a. Recommended agenda
    - i. Lessons Learned and noteworthy practices from post-job briefs, ORPS, walkthroughs, debriefings, etc.
    - ii. Review of date/period covered, and confirmation of WCDs for planned work.
    - iii. Area Coordinator updates:
      1. Unresolved conflicts.
      2. Denied work requests.
      3. Changes to construction or inaccessible areas.
    - iv. Injector status: status of LINAC, PAR, BOOSTER and major work.
    - v. Management expectations for toolbox talks, field presence, etc.
    - vi. Review of construction and inaccessible areas and bullets for communications.
  - b. Expectations for management presence in the field, at toolbox talks, pre-job briefs, safety walks, and plan of the day meetings will be discussed and coordinated.
    - i. Documentation of these efforts will be via [SMART Card](#).
9. The PSC DALD for Operations and the APS-U Project Director approve the final POW before its posted to the [APS Plan of the Week Box folder](#) and distributed to APS via the POW email.
10. PSC CPA sends weekly POW on Fridays to PSC.
11. Changes to the timing of work, such as rescheduled, extended in duration, moved earlier or dates adjusted follows the emergent work procedure in section 2.12. If the work is delayed beyond the current work the change in work will go through the standard POW process described in Section 2.
12. All emergent work activities that are not scheduled on the POW and do not conflict with other work activities must have approval by the area coordinator. In order to maintain appropriate situational awareness of emergent work governed by this procedure, work scope and area approvals for emergent work conducted by or impacting PSC personnel will be managed through the APS work request system.
  - a. Complete the following steps for emergent work.
    - i. Add the emergent work to the [APS work request system](#), select emergent work when entering the work request.
    - ii. Inform the appropriate area coordinator(s).
  - b. At the end of each week, the Technical Facilities and System Specialist will create a summary of emergent work from the previous week.
13. For work that conflicts with other activities outside of the area coordinator's scope, the area coordinators will work together with the APSU PM and the AES DD to resolve conflicting work that impacts other areas. Example, AES-MOM planned to work in Zone F from 4/3 to 4/11 and APS-U planned work in Zone F on 4/12, but APS-U is ahead of schedule, the Storage Ring/Mezzanine Coordinator would inform the APSU PM and AES

DD, those two would work together to resolve. Example of internal resolution, if APS-U planned work in Zone F from 4/3-4/5 for vacuum work and APS-U wanted to complete diagnostic work instead of vacuum work in Zone F, this would be handled internal to APS-U.

- a. If the APSU PM and AES DD are unable to resolve the issue, they will proceed as described below:
  - i. The APSU PM and AES DD will inform the Deputy ALD for Operations (or designee) and the APSU Project Director (or designee) of any changes to the POW that impacts work outside of the work group requiring deconfliction to determine resolution.
- b. Once resolved the APSU PM and AES DD will inform the area coordinators, who will have the POW updated as described above.

## 2.2. Plan of the Day

1. Plan of the day meetings will be held daily during normal business days and led by the area coordinator or designee. The area coordinators may combine meetings with other area meetings when prudent.
2. Plan of the day meetings will include representatives for the work in the areas including contractor and non-contractor work.
3. All emergent work activities that are not scheduled on the POW and do not conflict with other work activities must have approval by the area coordinator. In order to maintain appropriate situational awareness of emergent work governed by this procedure, work scope and area approvals for emergent work conducted by or impacting PSC personnel will be managed through the APS work request system.
  - a. Complete the following steps for emergent work.
    - i. Add the emergent work to the [APS work request system](#), select emergent work when entering the work request.
    - ii. Inform the appropriate area coordinator(s).
  - b. At the end of each week, the PSC Maintenance Shutdown Planning Coordinator or the Technical Facilities and System Specialist will create a summary of emergent work from the previous week.
4. For work that conflicts with other activities outside of the area coordinator's scope, the area coordinators will work together with the APSU PM and the AES DD to resolve conflicting work that impacts other areas. Example, AES-MOM planned to work in Zone F from 4/3 to 4/11 and APS-U planned work in Zone F on 4/12, but APS-U is ahead of schedule, the Storage Ring/Mezzanine Coordinator would inform the APSU PM and AES DD, those two would work together to resolve. Example of internal resolution, if APS-U planned work in Zone F from 4/3-4/5 for vacuum work and APS-U wanted to complete diagnostic work instead of vacuum work in Zone F, this would be handled internal to APS-U.
  - a. If the APSU PM and AES DD are unable to resolve the issue, they will proceed as described below:



- i. The APSU PM and AES DD will inform the Deputy ALD for Operations (or designee) and the APSU Project Director (or designee) of any changes to the POW that impacts work outside of the work group requiring deconfliction to determine resolution.
5. Once resolved the APSU PM and AES DD will inform the area coordinators, who will have the POW updated as described above.
6. Utilizing the approved plan of the week, discuss previous and next day work, recommended agenda items:
  - a. Recent safety and compliance issues and lessons learned.
  - b. Status of current day's planned work.
  - c. Conflicts affecting scheduled work activities.
  - d. Evaluation of operational and facility impacts (e.g., planned outage, scheduled drills, etc.).
  - e. Evaluation of facility status affecting activities/operations (access-controlled areas, equipment moves, equipment status, planned outages, etc.).
  - f. Work activities scheduled but not completed including causes for the failure to complete such activities.
  - g. Work activities scheduled for the next day.
  - h. Any emergent work that needs to be approved by area coordinator.
  - i. Any work requiring verbal work-release by the area coordinator in addition to the POW work release process.
  - j. Tours planned.

## 2.3. Toolbox Talk

1. Toolbox talk is a tool that is typically used the same day as starting work to refresh the work team on the day's work, provide safety tips and reminders and changes to the work environment from the previous workday. There will be a Global Toolbox talk followed by local pre-job briefs.
  - a. Toolbox talks will be held daily and will include all workers.
  - b. Toolbox talk agenda is below with mandatory fields in bold.
    - i. Recent safety and compliance issues and lessons learned.**
    - ii. Review of current day's planned work, readiness to conduct work, hazards, work scope, and impact of any co-located work.**
    - iii. Conflicts affecting scheduled work activities.**
    - iv. Evaluation of operational and facility impacts (e.g., planned outage, scheduled drills, etc.).
    - v. Evaluation of facility status affecting activities/operations (access to areas, equipment moves, equipment status, planned outages, changes to facility since previous workday, etc.).
    - vi. Any emergent work that needs to be approved by area manager.

## 3. ROLES AND RESPONSIBILITIES

- **Area Coordinators:**
  - Approve work activities for their respective area.
  - Deconflict work activities within their respective area.
  - Inform the APSU PM and/or the AES DD of work activities that impact/conflict with other area work activities.
- **Maintenance shutdown planning coordinator:**
  - Gathers input from PSC operations groups and coordinates with the Technical Facilities and System Specialist to build a PSC Plan of the Week.
  - Updates with POW for approved emergent work.
  - Provides POW to CPA for distribution.
- **Technical Facilities and System Specialist:**
  - Obtains APSU work from the APS upgrade work request via [APS-U POW](#) and coordinates with the Maintenance Shutdown Planning Coordinator to build a PSC Plan of the Week.
  - Updates with POW for approved emergent work.
  - Provides POW to CPA for distribution.
- **Responsible Manager:**
  - Manager overall responsible for the work
  - Supervisor for the responsible individual
- **Requestor:** Individual requesting work to be performed. Maybe be different from Responsible Individual.
- **Responsible Individual (Person in Charge):**
  - In charge of the work, regardless of job title.
  - Responsible for managing the entire process of work execution.
  - May manage multiple work activities.
  - Document work status (in progress, complete, etc.)

## 4. SUMMARY OF PROCESS

All work activities conducted in PSC facilities except for auxiliary support facilities, must be approved, authorized, and scheduled in accordance with the POD/POW process described in this procedure.

For activities being performed outside PSC-operated facilities in auxiliary support facilities (e.g., Building 981, Building 382, etc.), it will be the discretion of the respective responsible line manager to ensure that the level of rigor for planning, performing, and documenting the work is commensurate with the complexity of the operations being performed in those respective facilities.

## 5. FEEDBACK AND IMPROVEMENT

If you are using this procedure and have comments or suggested improvements for it, please go to the [APS Policies and Procedures Comment Form](#) \* to submit your input to a Procedure Administrator. If you are reviewing this procedure in workflow, your input must be entered in the comment box when you approve or reject the procedure.

Instructions for execution-time modifications to a policy/procedure can be found in the following document: Field Modification of APS Policy/Procedure ([APS 1408152](#)).

\* <https://www.aps.anl.gov/Document-Central/APS-Policies-and-Procedures-Comment-Form>

## 6. DOCUMENTS/RECORDS CREATED BY THIS PROCEDURE

The documents/records listed below will be created in the execution of this procedure and must be retained as indicated.

<b>Description of Document/Record (include ID number, if applicable)</b>	<b>Custodian</b>	<b>Storage Location and Medium</b>	<b>Retention Requirement</b>
Plan of the Week (POW) file (weekly file)	L. Boon/ J. Toeller	Box, electronic	5 years after the task, activity, or action is completed (DOE ADM 18.36)
Meeting minutes	K. Jaje	Box, electronic	5 years after the task, activity, or action is completed (DOE ADM 18.36)

