



Management of Change (MOC) Course: Change Classification, Risk Review, PSSR and Close-Out



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Introduction:

Management of Change MOC course on change classification, risk review, PSSR and close-out is a 5-day course for plant engineers, MOC coordinators and process safety staff, ending with an MOC Procedure and Register Improvement Plan for a case organisation. Refineries, petrochemical plants and utilities lose control of risk when modifications are treated as replacement in kind, temporary changes outlive their expiry, organisational changes skip screening and change records stay open after start-up. Nominees already raise or review change requests and work through case studies on change packages, redlines and register extracts. CoreConcept Training Center delivers this management of change course.

Course Objectives:

- Screen proposed plant modifications against MOC triggers and the replacement-in-kind test using design specification records
- Classify each request as technical, temporary, emergency or organisational change and route it through the correct approval path
- Select a hazard review depth proportionate to the change and document its technical basis and safety and health impact
- Update P&IDs, process safety information, operating procedures and training records before the changed equipment is put into service
- Decide when a modified plant needs a pre-startup safety review and confirm its readiness criteria are met
- Close out change records with as-built verification, audit sampling and backlog metrics, and build an MOC Procedure and Register Improvement Plan

Target Audience:

- Plant and process engineers who prepare change requests, technical basis notes and drawing redlines
 - MOC coordinators who run the change register, route approvals and chase overdue actions
 - Process safety staff who select hazard review depth and check risk review quality
 - Operations shift leads who authorise temporary and emergency changes on running units
 - Maintenance and inspection planners who judge replacement in kind for spares and repairs
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Course Outline:

Day 1: MOC Foundations, Change Triggers and Register Baseline

- MOC Purpose Within the Risk Based Process Safety Managing-Risk Pillar
- Change Triggers Across Chemicals, Technology, Equipment and Facilities
- Replacement-in-Kind Test Against Design Specification Records
- Incident Lessons From Unreviewed Plant Modifications and Bypasses
- MOC Register Baseline Review and Backlog Ageing Profile

Day 2: Change Classification Models and MOC Procedure Architecture

- Technical Change Screening Questionnaire and Classification Decision Tree
- Temporary Change Expiry Dates, Extensions and Reversal Checks
- Emergency Change Verbal Authorisation and Retrospective Review Rules
- Organisational Change Screening for Staffing and Role Reductions
- MOC Workflow Stages, Approver Matrix and Authority Levels

Day 3: Risk Review Depth, Technical Basis and Document Updates

- Hazard Review Depth Selection From Checklist to Full Study
- Technical Basis Note and Safety and Health Impact Statement
- Marked-Up P&ID Redlines and Process Safety Information Updates
- Operating Procedure Revision and Affected Staff Training Records
- Contractor and Maintenance Crew Briefing Before Change Start-Up

Day 4: PSSR for Modified Plant, Close-Out Audits and Problem Cases

- PSSR Scope Decision for Modified Plant Versus Minor Changes
- PSSR Checklist Confirming Construction Matches Design Specification
- MOC Close-Out Criteria and As-Built Drawing Verification
- Cumulative Change Effects and Overdue Temporary Change Escalation
- MOC Performance Metrics, Cycle Time and Audit Sampling

Day 5: Case Study MOC Procedure and Register Improvement Plan

- Refinery Case Change Request Classification and Screening Exercise
 - Petrochemical Case Risk Review and P&ID Redline Check
 - Utility Plant Case PSSR and Close-Out Audit Findings
 - Case Register Backlog Prioritisation and Metric Target Setting
 - MOC Procedure and Register Improvement Plan Completion
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Skills You Will Gain:

- Change Trigger Screening
- Replacement-in-Kind Judgement
- Change Classification
- Hazard Review Scoping
- Drawing and Document Redlining
- PSSR Readiness Verification
- MOC Close-Out Auditing
- Change Register Analytics

Why Attend This Course:

- Deliver an MOC Procedure and Register Improvement Plan for a case organisation to the operations manager and process safety lead for approval
- Judge whether a proposed modification is replacement in kind or needs a full change request, review and PSSR
- Avoid incidents, audit findings and start-up delays caused by unscreened modifications, expired temporary changes and open change records
- Coach shift leads, engineers and planners with the screening questionnaire, approver matrix and close-out checklist templates

Conclusion:

Back at work, the participant presents the MOC Procedure and Register Improvement Plan to the operations manager, the process safety lead and the engineering authority. They use it to agree the screening questionnaire, change categories, approver matrix and the rules for review depth, PSSR and close-out, and to set targets for clearing the register backlog. After the first quarter of changes handled under the revised procedure, the unit should review open temporary changes, overdue close-outs, drawing update lag and audit sample findings against the plan.

Frequently Asked Questions FAQ:

What should participants know before a management of change MOC course on classification, risk review and PSSR?

Participants should already work on an operating process plant and have raised, reviewed or approved at least a few change requests. Familiarity with P&IDs and operating procedures is expected. Anonymised change requests or a register extract from their own site help during the case work.

How does a management of change MOC course differ from a general process safety management course?

A general process safety course covers every element of the system and gives change control a single session. This course spends five days on the change process itself: triggers, classification, review depth, document updates, pre-startup review for modified plant and close-out.

Why do temporary changes cause so many problems in management of change MOC systems?

Temporary changes are approved quickly with an expiry date, then often stay in place long after it. Without tracked expiry, extension approval and reversal checks, a temporary bypass or hose connection silently becomes permanent plant that no one has reviewed.

What do participants take back from a management of change MOC course on PSSR and close-out?

Participants take back an MOC Procedure and Register Improvement Plan for a case organisation, with a screening questionnaire, classification decision tree, approver matrix, PSSR scope rules and close-out checklist they can adapt to their own plant.
