UPF Construction Special Instructions

Work Package No.: _____

Task No.: _____

Section 1

Component ID No.:	**Work Package Number:**
Start Up / System ID: (if applicable, if not NA / Int / Date)	
Discipline: ☐ Civil ☐ Mechanical ☐ Electrical ☐ Piping ☐ Maintenance ☐ Support	**Description/Scope:**

Quality Level: ☐ Q ☐ RS ☐ CC ☐	**Facility:** ☐ UPF Main ☐ Other:	Charge Number:
Additional Permitting Required: ☐ Yes ☐ No	**Field Engineer:** _____	**Date:** _____
M & T E: ☐ Yes ☐ No *If yes is checked, record M&TE information on page three.*		

Section 2

Review (As Required)

	Print/Type Name	Signature	Date
QCE	_____	_____	_____
Civil LdFE	_____	_____	_____
Electrical LdFE	_____	_____	_____
Mechanical LdFE	_____	_____	_____
Piping LdFE	_____	_____	_____
Survey LdFE	_____	_____	_____
Welding LdFE	_____	_____	_____
Subcontractor	_____	_____	_____
Engineering	_____	_____	_____
Other	_____	_____	_____

Approval:

	Print/Type Name	Signature	Date
QCL	_____	_____	_____
PFE	_____	_____	_____

Description/Scope (*continued*)**:**

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Work Package No.: _____

Task No.: _____

Component ID No.:	Work Package Number:

Section 3

Design Document No.:	Rev. No.:	Reference Document No.:	Rev. No.:

Work / Inspection
General Notes:

UPF Construction Special Instructions

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Component ID No.:	Work Package Number:

Section 4

Item No.	Work / Inspection	SUP	Date	IT	FE	Date	IT	QCE	Date	IT	Other	Date
000	**Prerequisites:** • Prior to performing any of the work below, ensure that the required reviews and approvals have been obtained											

Measuring and Test Equipment (M&TE)

Serial Number	Calibration Date	Calibration Due Date	Value

UPF Construction Special Instructions

Component ID No.:	Work Package Number:

Section 4 (continued)

Comments:

Section 5

Activity Complete

	Print/Type Name	Signature	Date		Print/Type Name	Signature	Date
Field Engineer	_____	_____	_____	Quality Control Engineer	_____	_____	_____

Section 6

Record Review

	Print/Type Name	Signature	Date		Print/Type Name	Signature	Date
Project Field Engineer	_____	_____	_____	Quality Control Lead	_____	_____	_____

UPF Construction Special Instructions

Process Instructions

Construction Special Instructions are created when the installation of equipment requires systematic sequencing or other design specifications that are not adequately addressed in the design documentation or existing discipline-specific procedures. The need for Construction Special Instructions is determined by complexity, quality level, and/or vendor's recommendations when not addressed by existing procedures. Construction Special Instructions are not intended to give detailed instructions for performing routine activities. Construction Special Instructions shall[i] be developed to a level of detail commensurate with the complexity of the activity and the need to ensure consistent and acceptable results. In most instances, Construction Special Instructions are related to specialized mechanical installations, but they may also be used for other installations such as Architectural, Civil, Electrical, Controls & Instrumentation, or Piping.

Examples of when Construction Special Instructions may be required are:

- When directing the installation of components using vendor-supplied assembly or installation instructions. For instance, if a vendor manual is 500 pages long and only five pages are applicable to the work being performed, the Special Instruction includes those five pages of instructions and specifies which steps are to be worked, and which steps require inspection sign-off.
- When installing a specialized valve in which the internals are to be removed prior to welding in place.
- When installing a motor assembly that requires environmental protection prior to the roof (or floor slab above) being installed. (Instructions are to include how to provide adequate protection.)
- Partial assembly/disassembly/installation of a component.

The Field Engineer shall develop Construction Special Instructions as stated below:

1. Review previously generated Special Instructions that may be applicable for the scope of work.
2. Using the Construction Special Instructions form CFN 1018, prepare the construction special instructions with input from the Front Line Supervisor, worker(s) (as required), and/or Quality Representative, by planning, work sequencing, reviewing, and coordinating items such as the following:
    - Determine the reviewers for the applicable scope.
    - Identify the Superintendent as a reviewer when the scope includes craft activities.

UPF Construction Special Instructions

Process Instructions (continued)

- Identify the required support organizations for approval in section 2 of the Special Instructions form based on the support required for the scope of work.
- When the scope includes craft activities, identify appropriate, approved reference documents within the applicable work package.
- In the General Notes section, identify if work steps are required to be performed sequentially.
- Identify and designate the inspection criteria, including those needed by others as deemed appropriate.
    - Hold Point (H): Mandatory verification point, construction activity may not progress without a release.
    - Inspection (I): Visual examination or measurement to verify the conformance of an item.
    - Monitor (M): To observe or examine work operations or processes.
    - Review (R): To examine documentation for establishing acceptability.
    - Surveillance (S): In-process monitoring of activities for quality assurance compliance.
    - Test (T): An activity performed to determine or verify the capability of a component, structure, or system to meet specified requirements.
    - Witness (W, technique): To observe or visually examine a specific work or test operation to determine compliance with established criteria.
    - Witness Point (W): An inspection point established with the expectation that it may be waived at the discretion of the responsible authority when contacted.

Process Instructions (continued)

- Review factors that may be pertinent to the work activity, and document them as prerequisites to the work operation. Prerequisites are grouped in a section of the Construction Special Instructions form, and may include, but are not limited to the following:
  - General statement: “Prior to performing the work below, ensure that the required reviews and approvals have been obtained.”
  - Special equipment requirements (e.g., rigging, calibrated measuring and test equipment).
  - Special storage, preservation, and maintenance requirements for equipment during staging, installation, and/or construction activities.
- Assign inspection points. Indicate not applicable (e.g., “N/A”) if the work step does not require an inspection point by the Supervisor, Field Engineer, Field Quality Control, or Other.
- Notes can be added within any work sequence. Notes are to be entered in bold print and may include Warning, Caution, Special Vendor Note, etc.
- Initiate changes to Special Instruction in accordance with the Work Package Change Request, CFN-1020 form.

The Supervisor shall:

- Maintain accountability for each Special Instruction through fabrication and installation, including rework of items identified as unacceptable by the Field Engineer or others until special instruction work completion and turnover to the Field Engineer. When identified, the Supervisor signs-off on completed work steps, and contacts the Field Engineer or others as defined in the Special Instruction.

UPF Construction Special Instructions

Work Package No.: _____

Task No.: _____

Form Instructions

Section 1

- **Component ID No.** – Enter component ID number.
- **Work Package No.** – Record the work package number the construction special instructions are supporting.
- **Start Up / System Number.** – Enter Start Up or System Number (if available).
- **Discipline –** Select the proper discipline for the instructions.
- **Description/Scope –** Document the primary scope (e.g., Install component X in building Y).
- **Quality Level** – Select the appropriate Quality Level for the item(s) being installed.
- **Additional Permiting Required –** Document any additional permitting requirements required for the instructions.
- **Facility** – Select the facility the construction special instructions support.
- **Charge Number** – Document the proper charge number(s) for the instructions.
- **Field Engineer** – Enter Field Engineer authoring the construction special instructions.
- **Measuring & Test Equipment (M&TE)** – Check box indicating if M&TE Equipment is to be used. If "Yes" box is checked, provide description of M&TE equipment in Section 4.

Section 2

- **Reviewers** – Responsible parties supporting the installation print, sign, and date indicating concurrence.
- **Approval** – Project Field Engineer and/or Quality Representative prints, signs, and dates indicating concurrence.

Section 3

- **Design / Reference Document No.** – Enter numbers and revisions of documents recording output from the design process that define the physical (e.g., size, location, or arrangement) and functional (e.g., operating and functional performance) characteristics for SSCs.

UPF Construction Special Instructions

Form Instructions (continued)

Section 4

- **Work Inspection (Work Steps)** – Enter work process steps, instructions, including required hold points. Obtain necessary inspections and initials/dates for hold points.
- **Measuring & Test Equipment (M&TE)** – Enter Tooling and/or Equipment used for installation and/or testing of components; include calibration date, calibration due date, and calibration value for each item.
- **Comments** – Enter general comments pertinent to the required process.

Section 5

- **Activity Complete** – Field Engineer (and Quality Representative if applicable) print, sign, and date indicating the process defined by the construction special instructions is complete and meets the intent of the documentation.

Section 6

- **Record Review** – Review the construction special instructions to ensure the record is adequate for closure documentation. Print, sign, and date indicating the record has been reviewed and is complete.