

**Cabrini Dream Mentor Program  
Document Control Procedure  
(CDMP)**

**Cabrini Schools**

**Status: Original  
Version #: 001  
DCN: CDMP-I-001-10-04-001  
Date: 08/12/2008**



***Cabrini Cares***

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**CDMP Confidential**

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Cabrini Dream Mentor Program Director

<b>Initiative/Offer Name:</b>	<b>Coreon Document Control Procedure</b>
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<b>CDMP DISTRIBUTION</b>
<b>As Determined by CDMP Director</b>

## CDMP – Roadmap To Your Dreams

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### Document Synopsis

Initiative/Offer Name: CMP Document Control Procedure Executive Owner: Gregory M. Campbell Director - CDMP
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Status:	Original
Version #:	001
Date:	08/12/2008
Abstract:	This document establishes the Management, Review, and approval procedure for Cabrini Dream Mentor Program controlled documents.
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### Document History:

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## 1 Purpose and Scope

This document establishes the management, review, and approval procedure for Cabrini Dream Mentor Program (CDMP) internal controlled process/work instructions, and the procedure for controlling external documents. (e.g., Outside of Cabrini Schools)

The scope of this procedure ensures the CDMP Director will establish and maintain documented procedure(s) to control CDMP related work documents and data (e.g., training, web site documents, database data and database reports). This procedure encompasses all controlled documents developed and distributed by Cabrini Dream Mentor Program to customers (e.g., students, parents, administrators and teachers).

## 2 Process / Procedure / Work Instructions

### 2.1 Inputs

The input to this process is the document to be controlled (See 2.2 Work Instructions).

### 2.2 Work Instructions

#### 2.2.1 Cabrini Dream Mentor Program (CDMP) Control Document Types

Type 1 Documents	CDMP Overall Pan Development, Responsibilities and Owners of the Cabrini Dream Mentor Program.
Type 2 Documents	Procedures/Standards – describe activities at the director level.
Type 3 Documents	Work/Job Instructions - provides details for how work is accomplished and is usually written by the Director or those appointed by the Director.
Type 4 Records	Consists of all forms, logs, and reports from controlled documents (Type 1 –3 documents) that becomes the quality record.
(*) Quality Records	Quality Records provide a record of the operation of the process/document being controlled. It identifies the records to be controlled from the individual documents that have been written, Examples of Quality records include meeting minutes, review results, agreements between web site developer (Reyes Data Services Inc., contracts, domain owner payments, vendor/supplier payment authorization and document review and approval evidence prior to be entered to the CDMP Web Site, (e.g., Web Update Table).

Document types that need to be controlled include, but are not limited to the following:

- Contracts
- Design Documents (Requirements)

- Handbooks
- Manuals
- Plans
- Procedures
- Requirement Specifications
- Standards
- Statements of Work
- Work Instructions

Note: A document tells you what to do. These include work instructions, operating instructions or process specifications. Documents that record what you have done are records. A record tells you what you did (e.g., web update log, training record). A document comes before the job; whereas, a record comes after.

### 2.2.2 Controlled Document Definition

A controlled document is any document developed and used, distributed, or revised by a Cabrini Dream mentor Program Director, which affects the quality of the final products or services we provide our customers (e.g., students, parents, administrators and teachers).

It is also a method for making sure that documents and procedures are readily available to all customers when they need them.

Considering this definition along with the list of controlled documents in Section 2.2.1.1 the document owner should be able to determine whether or not his/her document needs to be controlled. If it is still unclear as to whether or not document control is needed the document owner should consider the following question:

*Q. If you did not have the document in question, would not having it put the quality of our final product/service at risk?*

If at this point it is still unclear to the document owner as to whether or not document control is needed the document the CDMP Director will make the final decision.

### 2.2.3 Electronic & Paper Documents

Electronic documents are documents whose controlled copies are made available to CDMPs customers via the CDMP Website. The documents are transferred via Local Area Networks, Wide Area Networks, E-Mail, or some other means. Electronic controlled documents will be protected against unauthorized updates or revisions.

Paper documents are the “hard copy” documents whose controlled copies are made available to CDMP customers on paper. The Cabrini Dream Mentor Program Director will determine the method to distribute the documents.

No electronic or paper document can be distributed as “controlled” unless it has undergone the proper review and approval methods as specified in Section 3. This does not apply to documents in a “Draft” status that is distributed to start work.

### 2.3 Outputs

The controlled, revised, or obsolete documents are outputs of this process. The quality records from this process are identified below:

Quality Record	Description	Stored By Whom	Stored Where	Retention	Filing Method
Document Control Acceptance Checklist	Contains document information needed for acceptance	C D M P Director	CDMP Director's Files and secure Internet Sky Drive	Until revised or Updated	Either electronic or paper
Review/Approval Web Design & Development	Evidence of review/approval	C D M P Director	CDMP Director's Files and secure Internet Sky Drive	Until revised or Updated	Either electronic or paper

### **3 Controlling a Document**

This section describes the requirements for controlling a new or revised document.

#### **3.1 Document Control Acceptance Form (DCAF)**

For a document to be controlled it must meet the criteria outlined in the DCAF. The DCAF is a form that can be accessed via the Cabrini Dream Mentor Program web site ([www.dreammentorprogram.com](http://www.dreammentorprogram.com)). There is also a checklist in the References Section (Section 6.3) of this document that lists the types of information that the DCAF will require. Use this as a reference when creating a document that you will eventually place under control.

#### **3.2 Document Review/Approval**

All controlled documents must be reviewed and approved prior to use. A document owner may also be a document reviewer. It is the responsibility of the document owner to provide the reviewers with access to any information that they may require to properly review the document. The document owner will decide the appropriate method for document review/approval (e.g. approval meeting, E-Mail review, etc.).

##### **3.2.1 Determine the Document Reviewers**

It is the responsibility of the document owner to determine who the document reviewers are. The document owner should consider the impacts and outputs that the process outlines in the document when determining reviewers.

##### **3.2.2 Determine the Document Approvers**

The document owner shall determine who the appropriate approvers for the document are. The document owner can also be one of the approvers as long as there is more than one approver for the document.

##### **3.2.3 Review/Approval Records**

The document owner is responsible for maintaining any E-Mail comments, written comments, Meeting Logs, etc. that can serve as a record of document review and

approval. The reference section of this document contains an example of a form (Cabrini Dream Mentor Program Review Template) used to review/approve this document.

### **3.3 External Documents**

#### **3.3.1 External Document Defined**

The definition of an external document is any document created outside of the Cabrini Dream Mentor Program that affects the quality of service or the final product of the process/procedure being written.

#### **3.3.2 External Document Control**

Since CDMP does not produce this information, these documents do not have to be controlled in the same manner as internally created ones. The CDMP Director has the following responsibilities:

- Obtain appropriate document from the source, distributing and storing it accordingly, by electronically or filing in CDMP Director's worker's site.
- Determine if the document is already controlled. The document owner/user shall view the CDMP Sky Drive site to access the External Document Control Table (<http://cid-090c5d67b1fe2b43.skydrive.live.com/home.aspx?sa=3237092>) to determine if the document is already controlled. This table will list every external document that has been identified as controlled by Corporate Quality. If the document does not exist it is the responsibility of the document owner to supply the CDCC with the external document information. This information is captured as part of the Document Control Acceptance Checklist as mentioned in Section 3.1.

### **3.4 Control Document CDMP Web Site Database**

The CDMP Director will maintain a web site database (Sky Drive) of every controlled document of the CDMP Program. Access to these documents is for the CDMP Director and President of Reyes Data Services Inc.

#### **3.4.1 Adding a Controlled Document to the CDMP Web Site**

Document owners who need to add their document to the CDMP web site database will complete the steps outlined in the Document Control Acceptance Form. Upon completion

the form will be e-mailed to the CDMP Director for review. If the criteria for controlled documents have been met the CDMP Director will do the following:

- Assign a Document Control Number (DCN) and add it to the document
- Add the document to the CDMP web site
- Make the document accessible on the web site
- Inform document owner via E-Mail as to the document's location on the web site
- Return the Document Control Acceptance Checklist to the document owner complete with the DCN and the CDMP Seal.

### **3.4.2 Updating the CDMP Web Site (Revised Document)**

The CDMP will update the Control Document Sky Drive Web Site with the pertinent information of a revised document. As with new documents, a revised document will also adhere to the policies mentioned here (e.g. document review/approval, Document Control Acceptance Checklist). Refer to Section 3 control specifics.

### **3.4.3 Obsolete Documents**

When a document is discontinued or no longer relevant it must be removed from the CDMP web site. In cases such as these it is the document owner's responsibility to do the following:

- Notify the CDMP via e-mail that the document is obsolete and needs to be removed from the Control Document Database.
- Ensure that personnel/departments that utilize the document are made aware that it is obsolete.
- Remove or ensure the removal of obsolete documents from work areas (recycle or shred).

### **3.4.4 Accessing Controlled Document**

Access to control documents will be made available through the Sky Drive and CDMP Web Site Internet. Documents will be stored in the Documents section under the group area that produced it. To set apart documents on the web sites that are controlled from the ones that are not, the controlled documents will be labeled as such.

The controlled document list on the internet will constantly be updated to ensure that users are accessing the latest version of a document. If there is ever any doubt on whether or not a paper (hard) copy of a document is the latest version refer to the internet web sites.

### **3.5 Roles and Responsibilities**

This section describes the roles and responsibilities of the individuals/groups involved in document control.

#### **3.5.1 Document Owner**

All control documents will have a document owner who is responsible to:

- Complete all the sections of document control as outlined in the Document Control Acceptance Form.
- Determine who are the appropriate document reviewers and approvers.
- Provide document reviewers access to any required information for document review.
- Maintain any records that are the outputs of the Cabrini Dream mentor Program (CDMP) Document Control Procedure.
- Identify and process any external documents as specified in Section 3.3.
- Ensure that revised documents are re-controlled and adhere to this procedure
- Ensure that obsolete documents are handled as outlined in Section 3.4.3.
- Provide the CDMP Director with the document to be controlled along with a completed Document Control Acceptance Form

#### **3.5.2 Document Reviewer**

The document reviewer will review the document and attend any document review meetings or send comments to the document owner in a timely fashion.

### **3.5.3 Document Approver**

The document approver will either approve the document or supply the document owner with specific reasons on why the document was not approved.

### **3.5.4 Cabrini Dream Mentor Program (CDMP) Document Control Director**

The CDMP Director will be responsible to:

- Maintain the Control Document Database (CDMP)
- Maintain the External Document Control Table
- Provide access to controlled documents via the internet
- Return to document owners a signed copy of the Document Control Acceptance Form for their records

## 4 Appendix: Acronyms and Definitions

<b>Acronyms</b>	<b>Definitions</b>
CDMP	Cabrini Dream Mentor Program
CDCP	Cabrini Document Control Procedure
CDD	Control Document Database
DCAF	Document Control Approval Form
DCN	Document Control Number

## 5 Glossary

This section defines the terms utilized in this document.

<u>Term</u>	<u>Definition</u>
Controlled Document	Any document developed and used, distributed, or revised by a CDMP representative, which affects the quality of the final product/service.
Control Document Database	An electronic repository that contains all the pertinent information for controlled documents
Document Control Director	The person within a process responsible for the tasks in Section 3.5.4
Document Control Number	A unique alpha-numeric number that identifies a controlled document
Document Owner	The person with a process responsible for the tasks In Section 3.5.1
Effective Date	The date when a controlled document should be Used to do work
External Document	Any document created outside of Cabrini Dream Mentor Program that affects the quality of service or the final product.
Internal Document	Any document created within Cabrini Dream mentor Program that subscribes to this policy
Methods & Procedures	Documents defining specific details on how to perform work tasks in processes or organizations
Obsolete Document	Any previously controlled document that has been removed from control and is no longer used to do work.
Work Instructions	Documents defining specific details on how to perform work tasks in processes or organizations

## 6 References

### 6.1 CDMP Contact Information

Gregory M. Campbell  
 Allen Park, MI  
 (313) 928-6610 x 1020  
[campbellcms@yahoo.com](mailto:campbellcms@yahoo.com)

Julio Reyes (President Reyes Data Services)  
 Little River, SC  
 (843) 564-0092  
[julioreyes@jcrdataservices.com](mailto:julioreyes@jcrdataservices.com)

### 6.2 Cabrini Dream Mentor Director Contact Information

Gregory M. Campbell  
 Allen Park, MI  
 (313) 928-6610 x 1020  
[campbellcms@yahoo.com](mailto:campbellcms@yahoo.com)

### 6.3 Example of Info Needed for the DCAF

#### Document Info

<b>Doc Name:</b>	
<b>Effective Date:</b>	
<b>Type:</b>	Process, Scholarship, Academic, etc.
<b>Customer Name:</b>	Students, Parents, Administration, Teachers, Community
<b>Access Type:</b>	Internal, External or Customer
<b>Version Number:</b>	001, 002, 003, etc.
<b>Service Offering:</b>	College Data & Information
<b>Internal Organization:</b>	Cabrini Middle School, Cabrini High School

#### External Document(s) Info

<b>Doc Name:</b>	
<b>Version Number:</b>	001, 002, 003, etc.
<b>Section or Page Number:</b>	
<b>URL:</b>	<a href="http://www.dreammentorprogram.com">www.dreammentorprogram.com</a>
<b>Where Stored:</b>	Internet Web Site and Sky Drives (GMC & JCR)
<b>External Doc Number:</b>	

## 6.4 Example of Review / Approval Form

This section contains an example of the Cabrini Dream Mentor Program (CDMP) Document Review Form. This form can be accessed from the internet at: <http://cid-090c5d67b1fe2b43.skydrive.live.com/home.aspx?sa=410749058>

### EXAMPLE

## CDMP Document Review Form

**Document Title:** Coreon Document Control Procedure  
**Author:** Gregory M. Campbell  
**Author contact information:** [campbellcms@yahoo.com](mailto:campbellcms@yahoo.com) (313) 928 – 6610 x 1020

**Document Review Meeting Date/Time:** TBD  
**Document Review Medium (Phone/Internet):** TBD

**Scribe:** Gregory M. Campbell  
**Moderator:** Gregory M. Campbell

#### Attendees:

Document Stakeholders/Reviewers:	Function:	Email Address:	Phone #:	Document/Page Reference:
Greg Campbell	Director	<a href="mailto:campbellcms@yahoo.com">campbellcms@yahoo.com</a>	(313) 928-6610	CDMP Document Control Procedure
Julio Reyes	Developer	<a href="mailto:julioreyes@jcrdataservices.com">julioreyes@jcrdataservices.com</a>	(843) 564-0092	CDMP Document Control Procedure

#### Document Overview:

*The CDCP establishes the management, review and approval procedure for Cabrini internal controlled process/work instructions and the procedure for controlling external documents (e.g., Internet).*

**Issues/Discussion Log:**

(As the Author is reviewing the sections of the document. The reviewers are asked at the end of every section, if there are any issues, action items or comments. The page number is referenced, and a resolution is attempted, if time permits (moderator's call). If no resolution can be reached a follow-up meeting is organized and an organizer is assigned.)

Issue Num.	Issue/Action Item / Comment	Page Reference	Reviewer Name	Due Date	Resolution	Follow-up Meeting	Organizer
001	What docs controlled	Page 3	Julio Reyes	8/12/09	Types of control docs will be added	Rev. at next meeting	CDMP Director

**Document disposition:**

*(Stakeholders/Reviewers recommend disposition of the document: The choices are:)*

- *Baseline (approve) as is*
- *Baseline (approve) with discussed modifications*
- *Issues raisers to review revised document (sections) and provide a recommendation to approve or reject*
- *Another review of the revised document is needed*

**Follow-up Actions:**

(At meeting end, follow-up action is needed. The Author will distribute the issues list and document resolutions (if applicable) to the review team. Depending on the document disposition, the Author may publish the document. When the baselined document is ready for publishing, the Author will also include the issues log. If a re-review is necessary the Author will re-distribute the document and the Issue log to the reviewer/stakeholder once the modifications are made.

