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CIC Projects	Third Party CIC Guidelines	January 6, 2025	3.01



Capital Infrastructure Coordination Guidelines

Document Approval Information

Document	Effective Date	Approved By
Work Permit Approval and Coordination Process Guidelines	March 1, 2024	Stephen Coleman
Revisions	Jan 6, 2025	Stephen Coleman

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Document Details 3.01

Issuing Department	Third Party Capital Infrastructure Coordination Group(TP-CIC)
Document Owner	Pre-Construction Services / Third Party Capital Infrastructure Coordination Group
Approved By	Stephen Coleman
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Updated By	Jaime Ramirez- Tony Italiano
Intended Audience	Internal and External Stakeholders
Original Issue Date	January 21, 2013
Effective Date	January 06, 2025
Expiry Date	December 31, 2030
Document Status	Final
Review Cycle	Five Year
File Name	Third Party CIC Approval Process Guidelines
Jurisdiction	Metrolinx Owned Railway Corridors

Document Approval History

Version #	Date	Approved By	Description
1.0	21 January 2013	Grant Bailie	

Document Revision History

Version #	Date	Revised By	Description
1.0	21 January, 2013	Jeff Bateman	Final
2.0	01 April, 2013	Jeff Bateman	Revised to reflect new corridor purchase
3.0	01 February, 2024	Stephen Coleman	Revised to reflect new team alignment and processes.
3.01	06 January, 2025	Stephen Coleman	Revised to reflect revisions and updates.

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1. Acronyms

Acronym	Meaning
AREMA	American Railway Engineering and Maintenance-of-Way Association
CARF	Corridor Access Request Form
CROR	Canadian Railway Operating Rules
CIC	Capital Infrastructure Coordination
CSA	Canadian Standards Association
CPG	Capital Projects Group
CWZ	Continuous Work Zone
GO	GO Transit
GTTS	GO Transit Track Standards
H&S	Health & Safety
LOE	Level of Effort
NAPT	Network Access Planning Tool
OHSA	Occupational Health and Safety Act - Ontario
PM	Project Manager
RCAC	Rail Corridor Access and Control
RSA	Railway Safety Act
ROW	Right Of Way
SME	Subject Mater Expert
SMS	Safety Management System
TA	Technical Advisor
TC	Transport Canada
USRC	Union Station Rail Corridor

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2. Applicable Terms

The following list provides definitions to terms used within this document.

Term	Definition
AREMA	Means the American Railway Engineering and Maintenance-of-Way Association, and its published standards and best practices for railway engineering.
Kick-off Meeting	Initial meeting to explain Metrolinx CIC Third Party process
Level of Effort	Consultant’s estimate to the scope of work review.
MX Engineering Standards	Means the Metrolinx Engineering published standards and best practices for railway engineering.
Procedure	A written set of instructions that describe the approved step-by-step sequence of activities or course of actions(s) followed to perform a task.
Process	A group of interrelated or interacting activities that convert input into output.
ROW	Refers to the Metrolinx-owned and operated subdivisions of the railway infrastructure, rail/maintenance/layover yards, and all property between property fences, or if no fences, everywhere within 30 feet of the outermost rails.
Safety	Protection from, or not being exposed to, the risk of harm or injury.
Safety Management System	A formal framework for integrating safety into day-to-day operations following a continuous improvement cycle; inclusive of defined roles and responsibilities, established safety goals and setting of performance targets, documented processes, and procedures, completing risk assessments, and analyzing safety concerns, implementing corrective action to mitigate detected risks, and evaluating the overall effectiveness of the system.

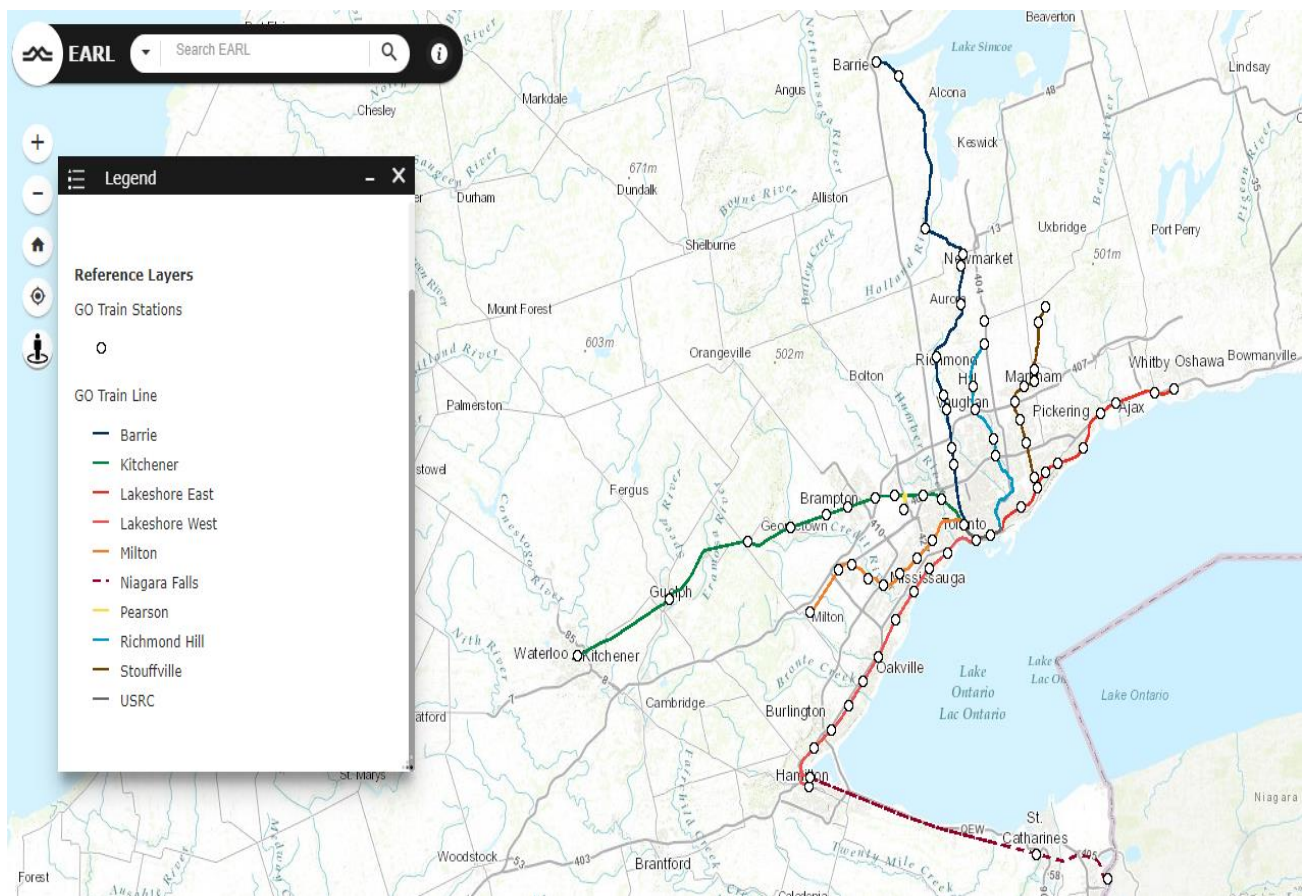
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3. Introduction

Metrolinx Capital Infrastructure Coordination (CIC) group plays a key role in protecting Metrolinx interests, assets and heavy rail operations while facilitating requests from third party applicants to construct within or near the heavy rail corridor.

To facilitate this mandate, CIC in tandem with their Technical Advisor (TA), shall follow the third-party review process as outlined in this guideline. The work permit and guidelines apply to all heavy rail corridor where Metrolinx operates such as outlined below.

Figure 1.1 – Metrolinx / GO Heavy Rail Network



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4. Purpose

The purpose of this document is to provide an overview of the TP CIC team and their technical advisor’s (TA) role in the review of third-party applications for access and/or construction within or in proximity of the heavy rail corridor.

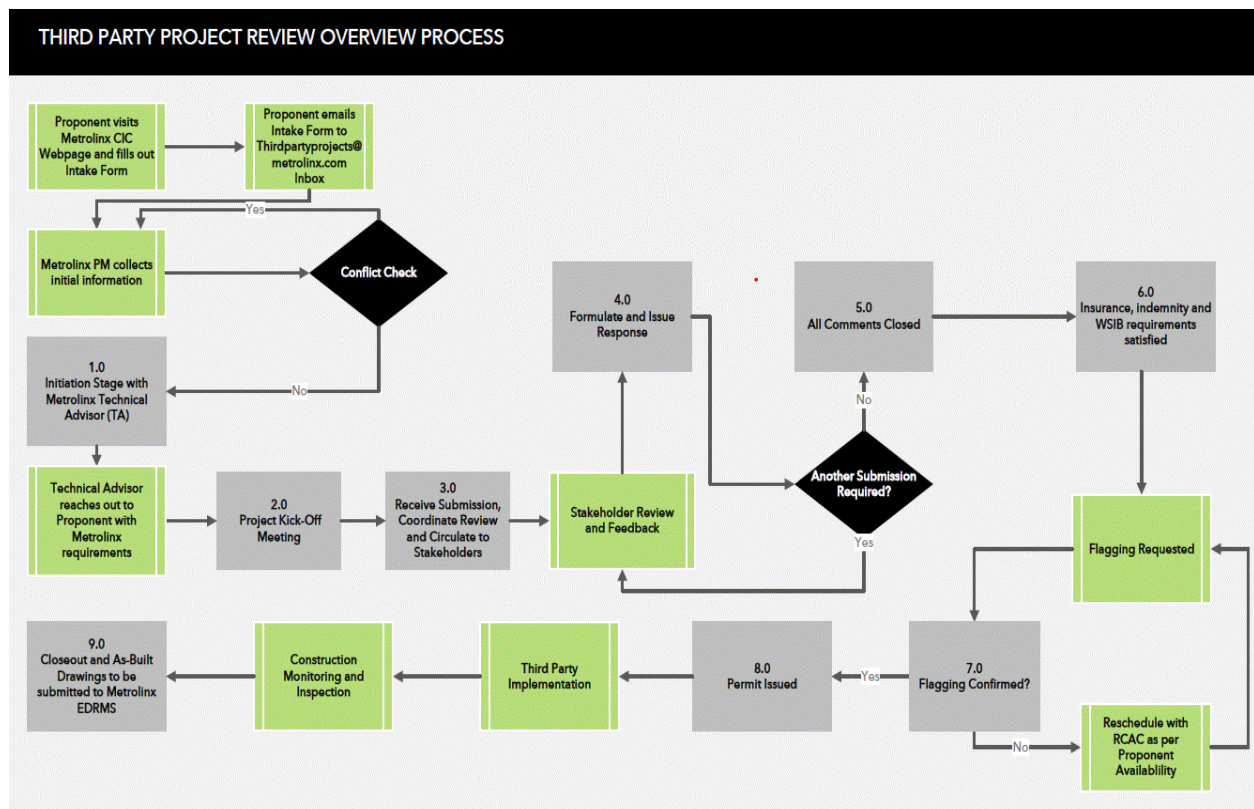
The overview will include the permitting process, which consists of the initiation of a request as well as a technical and conflict review of the scope amongst stakeholders. The intent of the review is to ensure asset protection as well as avoid any operational and capital project impacts.

Once all requirements are met and agreements are executed, a brief overview will be conducted to ensure the necessary flagging protection is in place for the work. This overview will cover CROR rules, PTS training, planning, coordination, and issuance of work permits.

This guideline provides a wholistic overview of the TP CIC’s function and the role it plays in facilitating third party applications and protecting Metrolinx assets, train operations and projects.

In Figure 2.1, you will see a high-level representation of the process:

Figure 2.1 – Process Overview



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5. Third Party Approval Processes

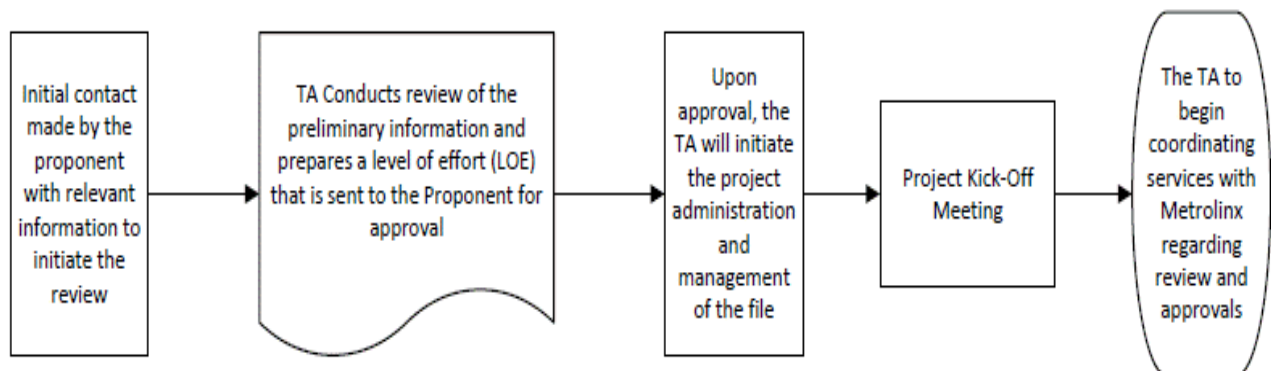
Below is an overview of the three phases of the work permit approval process. In tandem with the processes, the TA obtains scheduling information which is shared with internal Metrolinx stakeholders to obtain a No-conflict clearance with other Metrolinx projects and/or maintenance. The process is as follows:

- **Initiation Process** – Introduction to the proposal and initial on-boarding (*Represented by 1.0 in program management process map*) via webpage; see Phase 1 below.
- **Work Permit Approval Process** –Typically comprises of two parts:
 - 1) Design (where applicable) and
 - 2) Work plan technical review and approval (*Represented by 2.0 – 6.0 in program management process map*).
- **Corridor Access Coordination Process** - Coordination, scheduling and planning of the actual work, and issuance of the work permit. (*Represented by 6.0 – 7.0 in program management process map*).

Phase 1 - Initiation Process: as shown in Figure 5.1.1, in the initiation phase, the proponent will reach out to CIC using our website (link found below) and will complete and submit the intake form. Metrolinx CIC will then review the submission to understand the nature of the request and gather the who, what, where, when, and how of the project, and conduct an introduction meeting. Once the initial touchpoint has concluded, Metrolinx’s TA, (acting as advisor) will prepare a level of effort (LOE estimate) for the costs related to the review, the work permit issuance, and the access coordination. The costs and any subsequent charges are the full responsibility of the proponent and are to be paid to the TA directly.

Link: <https://www.metrolinx.com/en/about-us/doing-business-with-metrolinx/development-opportunities/construction-beside-go-corridors>

Figure 5.1.1 – Initiation Process Map



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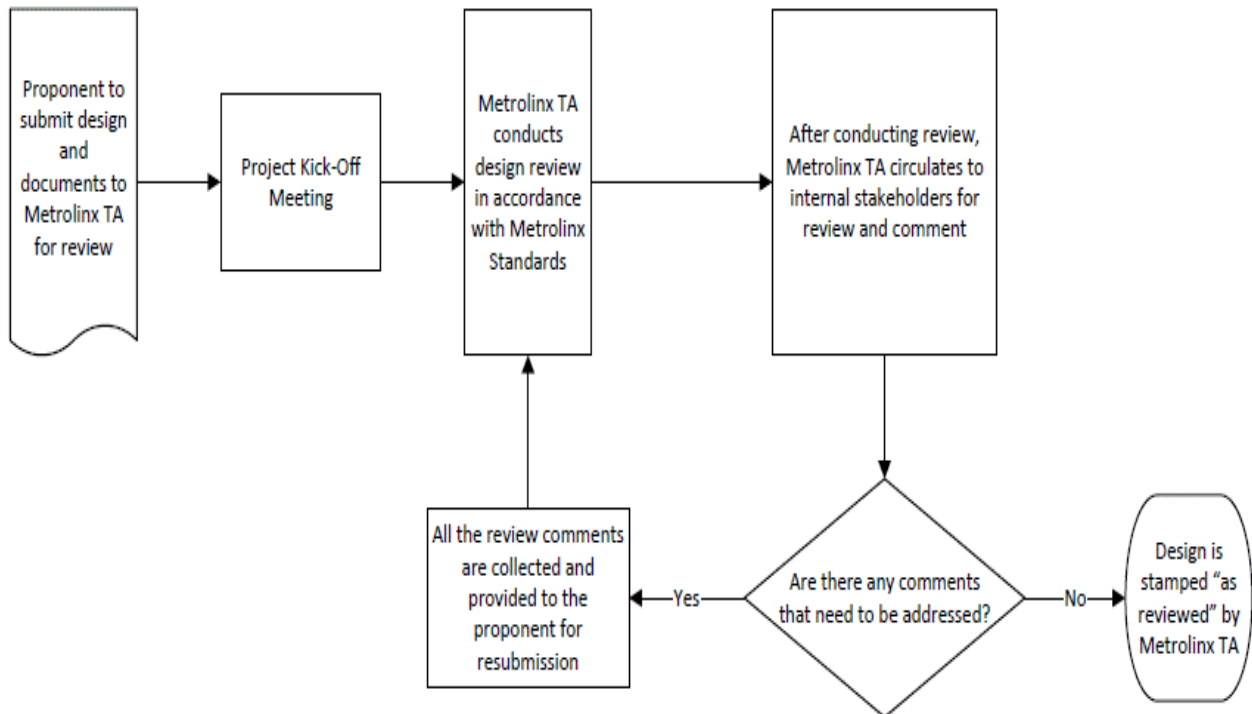
Phase 2 - Work Permit Approval Process:

- **Design Review (if applicable):** As shown in Figure 5.2.1 below, once the TA is onboarded, and the proponent has applied for a work permit, if a design review is applicable, the proponent would submit to the TA for review. An initial kick-off meeting will then be scheduled to explain the Metrolinx CIC Third Party process moving forward.

In the review, the TA will validate that all Metrolinx standards and policies have been adhered to, as well as coordinating the review with all relevant internal Metrolinx stakeholders. This includes any deviation requests from standards as well as agreements required between Metrolinx and the proponent. TA comments will then be provided to the proponent to address, until all comments are satisfied, and the design is approved.

For further information about guidelines and standards, please visit the Metrolinx Engineering Standards website: [Engineering Standards Page \(gosite.ca\)](http://gosite.ca)

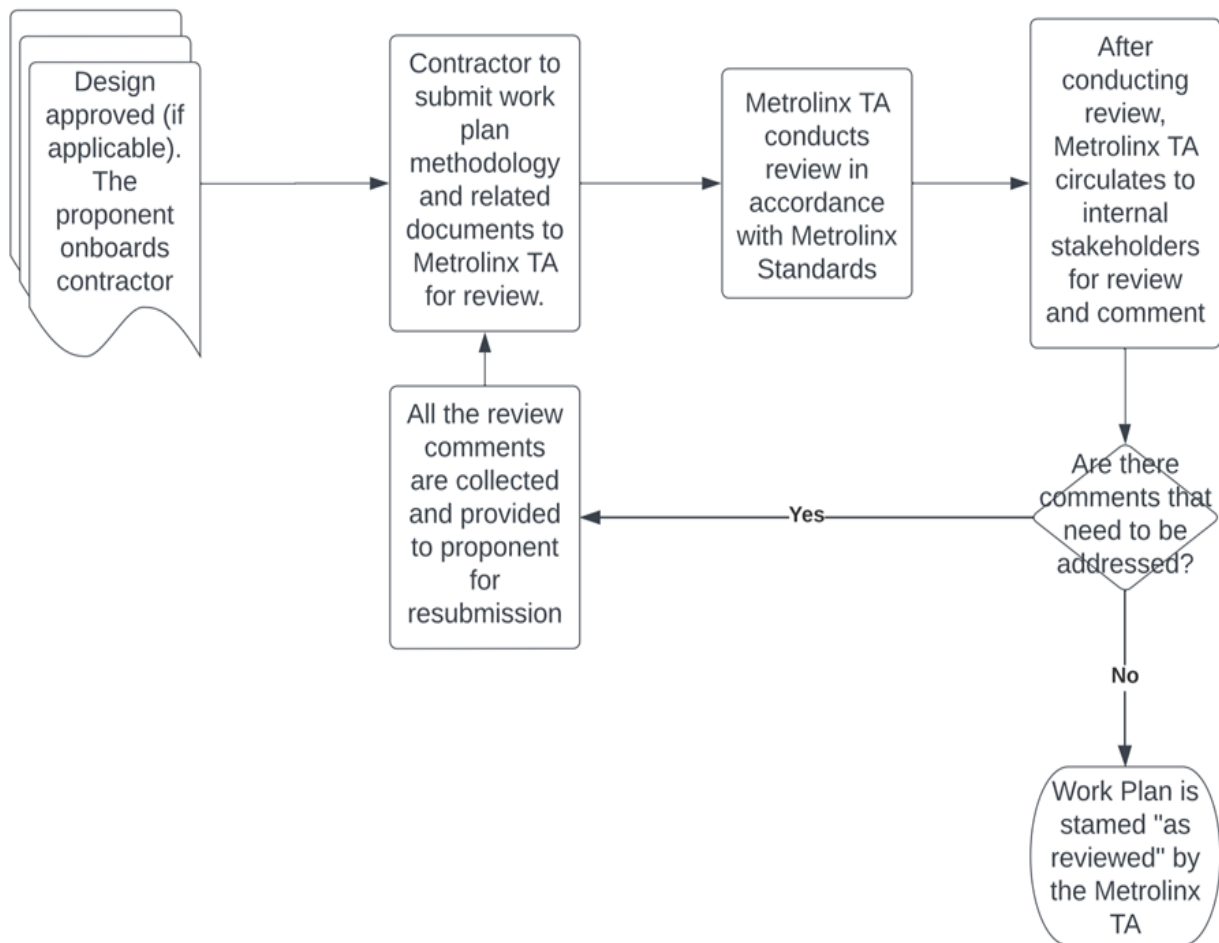
Figure 5.2.1 – Design Approval Process



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- **Work Plan Methodology Review:** In Figure 5.2.2, once (or in tandem) after the design is approved and the contractor conducting the work is on-boarded, the contractor will submit their work plan methodology for review. The work plan methodology is the action plan of how the work is going to be conducted. The TA will review the submission along with all relevant stakeholders and will provide comments to be addressed, like the process in the design phase. Once all comments are satisfied, the work permit will be ready for issuance.

Figure 5.2.2 – Work Plan Methodology Approval Process



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Phase 3 - Corridor Access Coordination: In Figure 5.3.1, once the work plan is approved, the proponent will submit the flagging request with the associated fees.

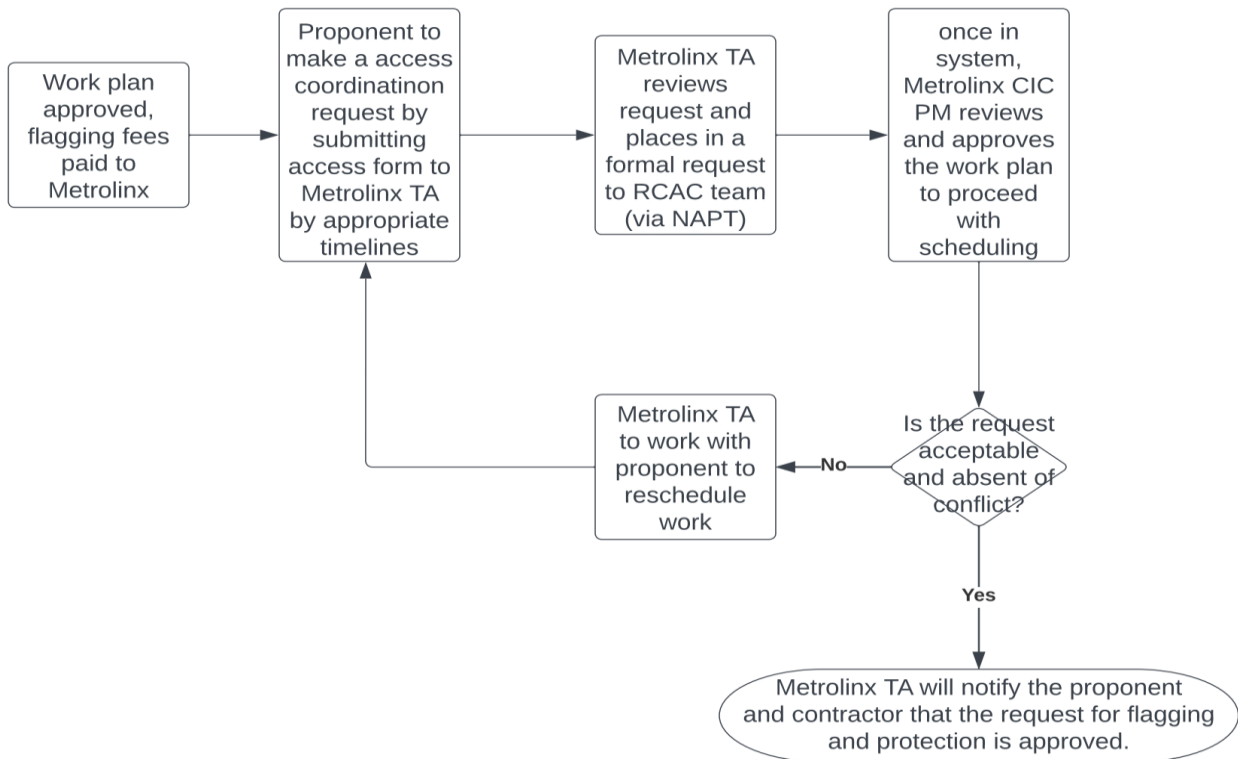
The submission will be reviewed for completeness by the TA and will be entered into the NAPT tool for approval by CIC, RCAC (Rail Corridor Access and Control – Mainline track, outside USRC), and/or USRC (Union Station Rail Corridor) access team, following the NAPT T-8 Process.

The NAPT approval process will look at several distinct factors, such as:

- CROR Compliance
- Available flagging resources
- Railway operations
- Rail corridor maintenance
- Capital projects

The CIC group will work with the proponent if conflicts are identified with the flagging/protection request.

Figure 5.3.1 – Typical Coordination Process Flow



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Flagging Protection Cancellations: Cancellations for all subdivisions will be accepted up until T-1 week in advance of the planned work events. Cancellations are to be submitted to the TA in advance of the above timelines. If there is a cancellation after such date for any reason, the flagging fees will not be refunded.

Please be advised that once a flagging request has been made, the proponent is financially committed to the request per RCAC cancellation policy

6. Mandatory Personal Track Safety

Metrolinx strongly encourages taking advantage of this training. This training is mandatory and is provided free of charge by Metrolinx if planned in advance

Due to the increased number of construction activities happening on or adjacent to Metrolinx railway corridors, a greater number of personnel are now exposed to the inherent hazards and risks associated with the railway environment. All individuals must complete the Personal Track Safety (PTS) training before working on or near Metrolinx railway corridors.

Personal Track Safety (PTS) certification is mandatory and must be completed before the project work begins.

The training must be completed by:

- Anyone working within the Metrolinx Right of Way (ROW);
- Anyone working under a form of track protection on a Metrolinx site;
- Anyone working on a piece of Metrolinx owned rail infrastructure (e.g., bridges, tunnels, etc.).

Link for PTS website: [Metrolinx - Personal Track Safety Program](#)

Incidents: For incidents related to fatalities please call 911. For incidents impacting the track and infrastructure, the contractor is to contact the **Customer Journey Control 416 681 5309**.

Reporting: in the event of an incident the contractor and proponent conducting the work must submit to Metrolinx a initial incident report, no less than 24 hours after the incident. Subsequently the contract and proponent must then provide a comprehensive final report no later than 72 hours post incident.

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7. Role of the Capital Infrastructure Coordination (CIC)

The CIC oversees the review and approvals for all Third-Party Project construction work permit applications. CIC key role is to ensure that all requests meet General Railway Compliance to issue proponents a work permit. This is achieved by following the below high-level overview of roles in conjunction with the technical advisor:

- Being the main access point for all Third-Party Project proponents as well as the main point of contact in Metrolinx.
- Project manage and direct the review of the necessary approvals such as design, workplan methodology and traffic review as required.
- Performing a stakeholder analysis to ensure all relevant internal stakeholders are aware of the request and have had an opportunity to provide feedback.
- Coordinate all necessary technical approval from internal SME's as required by the scope of the design and/or work methodology.
- Assist with requesting any deviation to the standards as required with the approval of the relevant SME's.
- Working with Realty and Legal to obtain all necessary legal agreements to protect Metrolinx as well as facilitate the request.
- Mitigate any concerns and/or complaints of the proponent and work towards an amicable resolution.
- Work with RCAC and the proponent to schedule the necessary flagging and protection of the work.

8. Role of the Technical Advisor (TA)

The Metrolinx TA's (Technical Advisor) role acting as the vendor of record is to ensure the protection and integrity of Metrolinx property, as well as existing and planned infrastructure. The TA achieves this goal by conducting engineering peer reviews of the design (where applicable) and work plan methodologies against Metrolinx and all applicable standards and internal SMEs to ensure that Metrolinx assets, operations, as well as ongoing and future projects are not impacted.

In conjunction with the peer review and permit issuance, the TA will also collaborate with the proponent to coordinate their work, ensuring there are no "constructor issues" within the vicinity of the project location, as well as coordinate flagging/protection requests to RCAC for the duration of the construction. Other responsibilities that are included but not limited to, are the necessity for site inspections, settlement monitoring reviews, project, and site meetings, to lead the discussion in clearing any conflicts, as well as ensuring all necessary agreements are in place.

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9. Internal Stakeholder Coordination

CIC coordinates with internal GO Transit/Metrolinx stakeholders for design and construction review and approvals, as well as coordinating the execution of any required agreements or real estate related issues (i.e. easements, sale of property) as required. Some, but not limited to the following internal stakeholders, may be consulted as part of the Third Party approval process:

Realty Services – provides direction on all property related issues and primary business lead for utility crossing agreements, easements and other land transactions as required (e.g. sale of property).

Legal Services – facilitates the execution of all legal matters including new and amended development agreements, crossing agreements, temporary use agreements and land transactions.

Interface Management Group – works with the CIC group to highlight any potential scheduling conflicts with the project delivery teams in order to avoid having a “constructor issue”.

Community Engagement – provides direction with any community related issues to protect the reputation of Metrolinx.

Engineering and Asset Management – technical teams such as Bridges and Structures and TCOE are frequent stakeholders in the review process. The groups also assist in ensuring a “No-conflict” with their planned maintenance programs.

Rail Corridor Access and Control – when a work permit is approved and protection and flagging is required, the request is made to RCAC to review and provide flagging and timelines for the approved type of protection to conduct work near the rails.

On-Corr Design Team – Proponents design (if applicable) is circulated to the On-Corr team to ensure there are no conflicts with designs for Metrolinx future infrastructure works.

Municipal Sponsor Team – (MSO) owns Governance (Issue escalation/resolution with municipal and agency partners) and supports the managing of partners for difficult and contentious issues.

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10. Important Information for Applicants

All design submissions are required to be in accordance with the relevant Metrolinx engineering and all applicable standards. Below is some highlighted information for reference to applicants.

The following information is required on all application drawings:

1. Caption stating “Construction, maintenance and operation of the line shall be in accordance with the latest Transport Canada General Orders E-11 and E-12 and the latest Canadian Standards Association C22.3 No. 1-15 and / or C22.3 No. 7-15, AREMA and MX Electrification Requirements as applicable.
2. Professional engineer’s stamp and signature is required.

The following information is required on all design-related oil disturbance and excavations:

1. Theoretical Railway Loading Influence Zone (slope 1.5H:1.0V starting 3.66 metres (12 feet) centreline of the nearest track on profile view), or the Bridge Loading Influence Zone on a profile / cross-section view of the drawing, as applicable.
2. Approved shoring protection will be required for any excavation within the Theoretical Railway Loading Influence Zone and / or the Bridge Loading Influence Zone.

Considerations for specific applications:

Overhead Utility (Power/Communication) Crossing

- When joint facilities are used, drawings must show information pertaining to both users. Applicant to ensure that another user is aware and has approved proposed joint facility.
- Location and all information must be shown pertaining to poles and adjacent structures or towers, anchors, guys, crossarms, insulators and power and communication cables.
- Railways do not ordinarily / typically permit poles, guys, etc. to be placed on the Railway Right-of-Way or less than 9 metres (30 feet) from the track centreline.
- Minimum clearances under maximum sag above top of rails and Railway Signals and Communications plant.
- Add 0.3 metres (1 foot) to clearance listed in CSA C22.3 No. 1-15 to allow for future track lifts;
- Horizontal and vertical separation between wires and cables.
- For other requirements please see CSA C22.3 No. 1-15.

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Underground Utility (Power/Communication) Crossing

- Type and details of cable and mechanical protection.
- Supply cables must be protected for the full width of the Railway’s right-of-way.
- If a pipe or duct is used under the tracks, it must extend the full width of the Railway’s Right-of-Way.
- If cables are mechanically protected with pipe or duct, it must extend the full width of the Railway’s Right-of-Way and the space between the carrier and the casing shall be sealed at the pipe ends to prevent the entry of water and foreign objects.
- Profile showing depth of burial from base of rail (minimum 5-1/2 feet (1.68 metres) or below frost line) and ditch bottoms to top of utility (below frost line).
- Intention to install warning markers at each edge of Railway Right-of-Way.
- Note stating method of installation (i.e., boring / auguring).
- Location of nearest excavation from nearest rail to be identified on drawing.
- Horizontal and vertical separation between wires all utilities.
- Pits are not typically permitted to be constructed on the Railway Right-of-Way or less than 9.0 m (30 feet) from the track centerline.
- If practical, track bores should be as far as possible from any Track Switch, typically at a minimum distance of 45.72 metres (150 feet) from the nearest Track Switch.
- If practical, handholes should be located as far as possible from the nearest track, a minimum of 9.0 metres (30 feet) from the nearest track.
- For other requirements please see CSA C22.3 No. 7-15.

Gas / Oil Pipeline Crossing

- Caption stating “Installation and Maintenance to be in accordance with Transport Canada Standards Respecting Pipeline Crossings Under Railways, TC E-10, AREMA and latest edition of the applicable CSA Standards.
- Intention to install warning markers at each edge of Railway Right-of-Way.
- Note stating method of installation (i.e., boring / auguring).
- Location of the proposed jacking and receiving pits in relation to the nearest rail to be identified on drawing.

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- Pits are not typically permitted to be constructed on the Railway Right-of-Way or less than 9.0 metres (30 feet) from the track centerline.
- If practical, track bores should be as far as possible from any Track Switch, typically at a minimum distance of 45.72 metres (150 feet) from the nearest Track Switch.
- If practical, manholes should be located as far as possible from the nearest track, a minimum of 9.14 metres (30 feet) from the nearest track.
- Pipelines carrying flammable or hazardous gas or liquids under railways shall not be placed within a culvert, under railway bridges nor closer than 13.7 metres (45 feet) to any portion of any railway bridge, building or other important structure on a railway right-of-way.
- Pipelines carrying flammable substance shall, where practicable, cross any railway where tracks are running on an embankment.
- Pipelines and casing pipe shall be suitably insulated from underground conduits carrying electric wires on Railway Rights-of-Way. Pipeline must be able to electronically located.

Water / Sewer Pipeline Crossing

- Direction of flow, location of shut off valves closest to the Railway Right-of-Way.
- Pipelines carrying steam, water, sewer, and other non-flammable or non-hazardous substances under railways shall be encased in a larger pipe or conduit called the casing pipe.
- Type, wall thickness and pressures (operating and maximum test) of carrier and casing pipes- ensure wall thickness of carrier and casing pipes meet TC E-10 requirements and other applicable standards.
- Type of cathodic protection (if used).
- Caption stating “Installation and Maintenance to be in accordance with Transport Canada Standards Respecting Pipeline Crossings Under Railways, TC E-10 and applicable Railway Standards”.
- If practical, track bores should be as far as possible from any Track Switch, typically at a minimum distance of 45.72 metres (150 feet) from the nearest Track Switch.
- If practical, manholes should be located as far as possible from the nearest track, a minimum of 9.14 metres (30 feet) from the nearest track.
- Pipelines carrying steam, water (including oil-filled, steam and water), sewer and other non-flammable or non-hazardous substances under railways, shall not be placed within culverts nor under railway bridges where there is likelihood of restricting the area required for the purposes for which the culverts or bridges were built, or of endangering the foundations.

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- Pipelines and casing pipes shall be suitably insulated from underground conduits carrying electric wires on Railway Rights-of-Way. Pipelines must be able to be electronically located.
- For other requirements please see Transport Canada TC E-10 and AREMA.

For further information about guidelines and standards, please visit the Metrolinx Engineering standards website: [Engineering Standards page \(gosite.ca\)](http://gosite.ca/EngineeringStandards)

****Disclaimer** The information provided is for reference only and is subject to change. The below may also be altered, added to or removed at any point by the Metrolinx technical advisor in order to meet Metrolinx applicable standards. For any questions or concerns, please reach out to the Metrolinx technical advisor and Project Manager assisting with the project file.**

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Appendix A




THIRD PARTY PROJECT INTAKE FORM

REQUIRED INFORMATION:	
Project / Asset Owner Company Name:	
Business Address:	
Primary Contact Name:	
Primary Contact Business Phone #:	
Primary Contact Email Address:	
Proposed Project Scope and Location: (Include details of all Ground or Horizontal Surface disruption on the railway corridor, and List of equipment.)	
Identify location of the proposed works on a Google Map including distance from the nearest rail.	
OTHER INFORMATION (If available):	
Names of Contractor(s) and Subcontractors to the Applicant:	
Primary Field Contact:	
Primary Field Contact Mobile Phone No:	
Estimated Construction Start Date:	
Estimated Construction Finish Date:	
Estimated Number of Days (8hr Shifts) of Railway Flagging Protection:	
Estimated Number of Railway Locate Requests:	

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Appendix B



WORK PERMIT

OAK-XX-0XX

Issue Date: October XX, 20XX Expiry Date: October XX, 20XX
 Extension# 0XX Extension Expiry Date: December- XX, 20XX

On-corridor Adjacent Development


Project Description:

Location	70 Old Mill Road, Oakville ON
Mileage & Corridor	13.70 Oakville Subdivision - Lakeshore West
Asset Owner	Municipality / Utilities
General Contractor	XYZ Construction
Competent Supervisor (Name and Number)	First and Last Name (416-XXX-XXXX)
24/7 Emergency Contact (Name and Number)	First and Last Name (416-XXX-XXXX)

Permit issuing Authority: _____ Signature: _____

Violation of any Work Permit terms and conditions will result in the immediate suspension of this Work Permit. All costs associated with the reinstatement of the Work Permit and associated flagging costs will be the sole responsibility of the Project Owner and/or General Contractor.

For emergencies related to fatality or serious injury, please call 911 followed by a call to Metrolinx Customer Journey Control (416-681-5309) All incidents involving the medical emergencies, impacting the track infrastructure, property damage, environmental spills and/or impact to potential Metrolinx rail operations, please contact the Metrolinx Customer Journey Control (NOC) at 416-681-5309 followed by a call to Metrolinx Project Manager. An initial incident report must be submitted within 24 hours and a detailed report submitted within 72 hours to the Metrolinx Project Manager.



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Appendix D



Contract Number, Work Plan Number, Revision No.

Print Document	WORK PLAN METHODOLOGY TEMPLATE CPG-PGM-FRM-277	Save File
All Sections of the Work Plan Methodology Template (WPM) is to be filled by the Contractor except for Section 2. Project Delivery Team and/or Consultant to verify the contents of the form.		

SECTION 1 - COVER PAGE			
SECTION 1.1 - WORK OVERVIEW			
Work Plan Name		Project Name	
Work Plan Number		Project Number	
Work Plan Revision No.		Contract Number	
Contractor		Subdivision	<input type="text"/>
WPM Author		Mileage Limits (Start and End)	
Metrolinx PDT Contact		Corridor	
Consultant / Technical Advisor		Competent Supervisor	
Major or Minor Work	<input type="text"/>	Shifts (Day / Night / Continuous)	<input type="text"/>
Work Start	Date <input type="text"/>	Work End	Date <input type="text"/>
	Time (24hr)		Time (24hr)
Total Work Duration (Hours)		Total Number of Work Days / Nights	
Track Protection Requested	<input type="text"/>	Track Work Block Requested	<input type="text"/>
Comments on Work Duration			
<small>Dates are displayed in Day / Month / Year format and times are displayed in Military Time format (range 0000 to 2359). Disclaimer: Calculated total work duration and total number of work days/nights are estimates and are subject to Metrolinx's operational restrictions.</small>			

SECTION 1.2 - SUBMISSION STAGE GATE						
Stage No.	Stage Description	Work plan Submission Deadline	Work plan Submission Date	Submission Deadline Met / Missed	Work Plan Revision No.	Status (Reviewed, Review with Comments, Revise and Resubmit, Scope Change)
1	WPM Submittal (40 Days in advance of Track Block)				0	<input type="text"/>
2	WPM Review Finalized (21 Days prior to Track Block)					<input type="text"/>
3	WPM Final Approval (7 Days prior to Track Block, decision subject to change)					<input type="text"/>
4	Pre-block Meeting (4 Days in Advance of the Track Block)					<input type="text"/>
5	Support Staff Conference (24 Hrs. in Advance of the Track Block)					<input type="text"/>
<small>Pre-Block Meeting and Support Staff Conference to conform to specifications outlined in Track Closures, Railway Track Construction, Temporary Track Protection and other related documents. Dates are displayed in Day / Month / Year format</small>						

SECTION 1.3 - CORRIDOR ACCESS	
Who is the Constructor for this work?	<input type="text"/>
Has Corridor Access been granted for this work?	<input type="text"/>
Are there other works to be coordinated with in the work area?	<input type="text"/>

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Appendix E

(Left intentionally blank for future use)

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(Left intentionally blank for future use)