METROLINX

Metrolinx Network Access Planning Standard

MX-RCAC-STD-001

Revision 01
July 2025

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MX-RCAC-STD-001
Publication Date: August 2023
Revision Date: July 2025

Metrolinx,

An Agency of the Government of Ontario

Preface

This is the second edition of the Metrolinx Network Access Planning Standard (NAPS), MX-RCAC-STD-001. This version includes extending the long-term planning process from a T-35 process to a T-50 process, adjusting the T-8 process to better meet requesters' needs with a reduced reliance on meetings, and clarifying Disruptive Access descriptions.

This standard is to be used by Metrolinx, Third Parties, and all Contractors that require access to, or are adjacent to, the Metrolinx-owned or operated Rail Corridor to perform their work.

This document was developed by the Rail Corridor Access Control (RCAC) Office, Service and Access Planning Division, Metrolinx.

Suggestions for revision or improvements, including a description of the proposed change(s) along with information on the background of the application and any other useful rationale or justification, can be sent to the Metrolinx Rail Corridor Access Control Office, Attention: Vice President, Service and Access Planning. The Vice President, Service and Access Planning, ultimately authorizes the changes. Proposals for revisions or improvements are to include your name, company affiliation (if applicable), e-mail address, and phone number.

July 2025

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1 Introduction

1.1 Purpose

1.1.1 The Metrolinx Network Access Planning Standard (NAPS) articulates the access planning processes for requesting, deconflicting, and finalizing all Rail Corridor Access and Track Protection requests to support the safe execution of Works within the Metrolinx-owned and operated Rail Corridors.

1.1.2 Metrolinx may supplement, amend or replace the Network Access Planning Standard, including establishing additional rules and procedures applicable to the Metrolinx Network. Each newly published Network Access Planning Standard shall replace the previous version.

1.2 Principles of NAPS

1.2.1 The core principles of NAPS are as follows:

a) **To enable safe Rail Corridor Access and Track Protection to the Metrolinx rail network.** Safe access to the Rail Corridor will be managed through central knowledge of all works within or adjacent to the Rail Corridor, ensuring that all planned works have adequate time to be integrated into an Access Plan and conflicts between Work Groups and Work Sites are identified and managed.

b) **To increase productivity during Track Closures and other planned Work Events**. Increased productivity is achieved through undertaking collective access agreements (sharing) and reducing the impact on Train Movements and Work Events. The coordination of activities promotes all Work Sites to work more efficiently.

c) **To facilitate the best for the industry and for customer decisions**. Justification and advanced knowledge of the impact on planned Train Movements by a requested work event assures that the level of impact on Train Movements permitted allows for an effective and efficient work event. Planning work events that affect existing operating plans in advance enables train service schedules to be adjusted in a timely manner.

d) **To standardize the process for planning Rail Corridor Access**. Improving consistency in planning for different types of categories of Rail Corridor Access promotes sufficient review, deconfliction, approval, and productive execution of Work Events. This further reduces productivity losses that result from uncertain processes or inconsistent communication.

2 Abbreviations, Definitions, and Roles and Responsibilities

2.1 Abbreviations

2.1.1 The abbreviations used in this Standard shall have the meaning prescribed in Table 2.

Table 1 Abbreviations

Abbreviation	Definition
CROR	Canadian Rail Operating Rules
CMO	Construction Management Office
CWZ	Continuous Work Zone
GDP	Ground Disturbance Permit
EAS	Engineering Access Statement
EASS	Engineering Access Statement Standard
GDP	Ground Disturbance Permit
MX GEI	General Engineering Instructions
NAPS	Network Access Planning Standard
NAPT	Network Access Planning Tool
NOC	Network Operations Control
OHSA	Occupational Health and Safety Act
ORP	Operations Readiness Panel
PDT	Project Delivery Team
POC	Point of Contact
RCAC	Rail Corridor Access and Control
RCAP	Rail Corridor Access Plan
RCAR	Rail Corridor Access Request
RTC (Operations)	Rail Traffic Controller
SPOC	Single Point of Contact
TSO	Temporary Slow Order
UPX	Union Pearson Express
USRC	Union Station Rail Corridor
WAN	Weekly Access Notice

2.2 Definitions

2.2.1 Capitalized terms used in this standard shall have the meanings prescribed in Table 1.

Table 2 - Definitions

Term	Definition
Access Pack	The information is issued to all stakeholders weekly, which dictates the means and methods of those Rail Corridor Accesses, which have been confirmed by Metrolinx
Blanket Request	Requests that are found not to be reflective of actual works being carried out in the field on the specific date and time, with a large variety of generic work scopes.
Business Justification	A business case is presented to RCAC to assess the validity of a new work event or a modification to an existing work event that is requested outside of the prescribed timelines. Template in **Appendix C.**
Construction	Is defined in the OHSA as being: The "erection, alteration, repair, dismantling, demolition, structural maintenance, painting, land clearing, earth moving, grading, excavating, trenching, digging, boring, drilling, blasting, or concreting, the installation of any machinery or equipment, and any work or undertaking in connection with a project, but does not include any work or undertaking underground in a mine". The terms "Construction" and "Project" need to be read together. Where an activity within the definition of "Construction" is being performed on an object within a "Project", the matter is a construction project.
Constructor	Is defined in the OHSA as a person who undertakes a project for an owner and includes an owner who undertakes all or part of a project by himself or by more than one employer. The constructor is generally the person who has overall control of a project.
Contractor	Is an individual, person or entity, engaged under contract by Metrolinx, or a third party, to provide Construction or Maintenance services within Metrolinx property. A Contractor can include a general contractor or a project company.

Disruptive Possession	Rail Corridor Access to perform works that could not be performed during the white periods. Works that require cancelled or modified operational train service and/or cancelled Train Movements, including but not restricted to GO revenue services and Rail Operations, including other Rail Operators utilizing the Metrolinx rail network.
Disruptive Access Calendar	A part of the Engineering Access Statement that outlines the time when Disruptive Access is available.
Emergency Access Request	A Rail Corridor Access Request in respect of an Emergency Rail Situation.
Emergency Rail Situation	Any situation that, in the opinion of Metrolinx or another Rail Operator, causes an immediate and serious threat or danger to the public, Metrolinx, another Rail Operator, or a Contractor, or causes an immediate and serious threat to Railway Operations.
Engineering Access Statement (EAS)	A document issued annually by Metrolinx detailing the Disruptive Access Calendar, Rules of the Route, and available white periods.
Engineering Access Statement Standard (EASS)	The document governing the process to create and distribute the Engineering Access Statement.
Foreman	An employee in charge of the Protection of track and track units.
General Engineering Instructions (MX GEI)	Instructions and procedures that provide information and guidance that must be adhered to when working within the Metrolinx-owned Rail Corridor.
Government of Ontario (GO)	The Government of Ontario is the authoritative provincial administration that governs the Canadian province of Ontario. It establishes and enforces laws, implements policies, oversees public services, and manages a variety of agencies, boards, and commissions essential for its operations.
Ground Disturbance Permit	A permit is required to perform all ground disturbance work within the Metrolinx ROW.
Metrolinx	Is an agency of the Government of Ontario and includes GO Transit, Presto, and UP Express.
Network Access Planning Tool	An application which requesting parties utilize to submit their request(s) for corridor access
Non-Disruptive Access	Works occurring within the Rail Corridor or adjacent to live tracks that do not require forms of Positive Track Protection and do not impact planned revenue service, Train Movements, and/or 3rd Party Carriers.

Operational Restrictions and Impairments	Any impact on Metrolinx infrastructure that modifies, disrupts, or cancels the current operating practices, procedures, or processes. This includes but is not limited to Permanent Slow Orders, Temporary Slow Orders, track diversions, lost functionality of plant, platform restrictions, door restrictions and tracks no longer in service.
Positive Protection	Track(s) are protected in accordance with Canadian Rail Operating Rules (CROR) - Protection of Track Work (Rules 41, 42, 841, 842) or Track Occupancy Permit (TOP Rules 849 to 864 inclusive).
Priority Situation	A situation where a railway asset has failed, partially failed, or is highly likely to fail that has the potential to cause a threat to life and/or a threat to Railway Operations.
Priority Access Request	A request to resolve a Priority Situation.
Project	Any private or public construction project, including: • the construction of a building, bridge, structure, industrial establishment, mining plant, shaft, tunnel, caisson, trench, excavation, highway, railway, street, runway, parking lot, cofferdam, conduit, sewer, watermain, service connection, telegraph, telephone or electrical cable, pipeline, duct or well, or any combination thereof • the moving of a building or structure; or • any work or undertaking, or any lands or appurtenances used in connection with construction.
Project Delivery Team (PDT)	The PDT assists in planning the development effort and helps construct commitments to complete the project within established scope, schedule, and budget constraints. The Project Delivery Team may include the subject matter experts responsible for implementing the project solutions. The PDT can consist of contractors, Metrolinx employees or a combination of either.
Rail Corridor	Refers to the Metrolinx-owned or leased land including but not limited to: Lakeshore West, Milton, Kitchener, Barrie, Richmond Hill, Stouffville, Lakeshore East, USRC, and on subdivisions of railway infrastructure, rail/maintenance/layover yards, and all property between property fences, or if no fences, everywhere within 30 feet from the outermost rails.
Rail Corridor Access	Access to a Rail Corridor.
Rail Corridor Access Plan (RCAP)	The plan prepared by the PDT and/or contractor in connection with the Rail Corridor Access required for the Works/Project.

Rail Operator	Metrolinx, Canadian National Railway (CN), Canadian Pacific Railway (CP), VIA Rail Canada, and/or any 3rd party operator.
Railway Operations	The operation of one or more active railways by Metrolinx or other Rail Operators, including the passage of freight, equipment, and passenger trains, both in revenue service and non-revenue service.
Regulatory Maintenance (L1)	Inspections are required by Transport Canada on any part of the Rail Infrastructure.
Routing	A set of train operating instructions designed to maximize the White Period in a specific area.
Rail Traffic Controller (RTC)	A person in charge of the supervision and direction of Train Movements, the provision of protection for Track Work, and Track Units on a specified territory.
Safe Work Pack	Information used by stakeholders that provides the safety arrangements for all Works to be undertaken on site.
T-	'T' denotes the date associated with the execution of the Works on the Rail Corridor. The number relates to the number of weeks unless stated otherwise.
Teams	Project Delivery, Maintenance Delivery and/or Third-Party Project.
Temporary Slow Order	A temporary speed restriction on a track(s) that is set below the track zone speed as indicated in the current timetable.
Third-Party Projects	Work Events facilitated by any person or entity other than Metrolinx or under contract to Metrolinx that require access to a Rail Corridor.
Third-Party Territory	Rail Corridor(s) owned by Canadian National Railway, Canadian Pacific Railway or any other person/entity other than Metrolinx.
Track Closure	Track(s) are not available for planned Train Movements, and the track(s) are under a form of Positive Protection or Operating Bulletin.
Track Availability	The time from which Positive Protection on a track can be requested to the time the Positive Protection must be cancelled, within which a Work Event can occur.
Train Movements	The operation of trains by Metrolinx or other Rail Operators, including but not limited to: the passage of freight, equipment, and passenger trains both in revenue and non-revenue service.
Track Protection Forecast	An assessment of Track Protection, provided by the Project Delivery Teams, outlining the required Track Protection resources for a given period of time.

Track Protection	The type of protection that will be implemented with each Rail Corridor Access, methodologies of Protection types and requirements are outlined within the General Engineering Instructions (MXGEI).
Track Units	A vehicle or machine capable of on-track operation and utilized for track inspection, track work and other railway activities when on the track.
Union Station Rail Corridor (USRC)	The Rail Corridor is located approximately between Strachan Avenue and the Don River.
White Period Access	Rail Corridor Access that does not impact planned revenue service or require modified train schedules, reduced Train Movements, and/or cancelled Train Movements as outlined within the Rules of the Route.
Work	Any activities that take place for the purpose of design, construction, maintenance, installation, testing and commissioning of the scope of a project within the Rail Corridor.
Work Events	Any Rail Corridor Access that requires time and space to perform any Works within a Rail Corridor.
Work Plan	A detailed methodology and description of a contractor's proposed work activities which addresses relevant OHS concerns to promote safe work practices, coordinate overlapping Works and utilize to arrange for the appropriate track protection.
Work Sites	A dedicated location for performing a specific task within the Rail Corridor related to a Work Event, task(s), and may require additional flagging resources in accordance with the Metrolinx GEI.
Work Train	A work train is a non-revenue train used in railway construction and maintenance. It supports activities such as ballast distribution, track renewal, material transportation, and on-track machinery movement.
Working Days	Mondays through Fridays, excluding legal holidays.
Working Limits	Means the limits that the work will be occurring within, not including travelling equipment moves.
Y- number	Year minus weeks.
Yellow Plant	Engineering machinery able to travel under their own power at track speed (or similar), such as tampers and ballast regulators.

2.3 Roles & Responsibilities

2.3.1 The table below provides a summary of the key stakeholders involved in the Rail Corridor Access planning process and their key roles and responsibilities associated with Rail Corridor Access planning.

Table 1 – Roles & Responsibilities of Key Stakeholders

Item	Role	Access planning responsibilities
1	**Metrolinx**	• To represent key stakeholders and make the best industry decisions for railway operations and customers. • To review the annual Engineering Access Statement, confirming it meets the requirements of the identified industry stakeholders.
2	**Rail Corridor Access and Control**	• To manage and integrate all Rail Corridor Access requests across the operating network. • To manage and control the information contained in the Network Access Planning Tool or RCAR. • To plan onsite track protection. • To facilitate the GO/NO-GO decision as to whether a Work Event is to be delivered within a specific Rail Corridor Access.
3	**GO Service Design**	• To develop train schedules and the annual Engineering Access Statement, including associated superseding updates to the EAS. • To provide subject matter expertise as it relates to operational impacts at all stages of Rail Corridor Access planning.
4	**NOC Infrastructure Control**	• To work with RCAC to determine specific Work limits and train routing instructions prior to Works commencing on the Rail Corridor. • To provide subject matter expertise as it relates to operational impacts at all stages of Rail Corridor Access planning.

5	**Project Delivery Team**	• To provide the Contractor with the relevant access to Rail Corridor Access planning information as part of the pre-construction phase to support the Contractor in the development of its Rail Corridor Access Plan. • To validate the Rail Corridor Access Plans/Request submitted by the Contractor to ensure they align with the requirements of the Project. • To prioritize and deconflict works originating from their own division prior to submission. • To adhere to the planning timeframes and requirements set out in this NAPS and EASS. • To submit Rail Corridor Access requests, including all required information and attachments, within the Network Access Planning Tool or RCAR. • To have the workplan reviewed by all relevant stakeholders and all permits obtained.
6	**The Contractor/ Constructor**	• To adhere to the planning timeframes and requirements set out in this NAPS and EASS. • To develop the Rail Corridor Access Plan for their Project, receive endorsement from the PDT, and approval from RCAC. • To support RCAC in meetings intended to develop and deconflict conflicting Rail Corridor Access requests. • To submit Rail Corridor Access requests, including all required information and attachments, within the Network Access Planning Tool or RCAR.

3 Categories of Rail Corridor Access

3.1 Categories of Rail Corridor Access

3.1.1 Rail Corridor Access is categorized into three main types of access based on the level of disruption they cause to planned Train Movements. These are:

a) Non-Disruptive;

b) White Period; and

c) Disruptive Possession

3.2 Non-Disruptive

3.2.1 Non-Disruptive Access is primarily for the purposes of Works occurring within the Rail Corridor that do not require forms of Positive Track Protection. Non-Disruptive Access activities do not impact planned revenue service, Train Movements, and/or 3rd Party carriers. Non-Disruptive Access activities support operational resiliency by clearing immediately, working behind an approved CWZ, or are located at a distance away from the corridor that they are compliant with prescribed forms of protection(s) outlined within the most current MX General Engineering Instructions (GEI).

3.3 White Period

3.3.1 White Period Access occurs outside of scheduled GO, UPX, and Third Party Passenger Railways train movements where tracks can be occupied without impacting planned revenue or non–revenue train movements.

3.3.2 For each Rail Corridor, the Engineering Access Statement details the specific days, times, and tracks where White Period Accesses are available to be requested at each location within the Rail Corridor.

3.3.3 White Period Access for purposes of Regulatory Maintenance (L1) is entitled to request/book Access in priority to White Period Access requested by other groups. Such access must be booked annually and reflected in the EAS.

3.4 Disruptive Possessions

3.4.1 Disruptive Possession Accesses are subject to the processes and timelines as defined in the Engineering Access Statement Standard (EASS) and Engineering Access Statement (EAS), which outlines the dates and types of Disruptive Possession Access that can be booked in the subject year. See **Appendix D** for a link to the EAS.

3.4.2 Disruptive Possession requests require Rail Corridor Access to perform works that could not be performed during white periods or under non-disruptive forms of access. These Works require cancelled or modified GO train service and/or cancelled Train Movements, including but not restricted to GO revenue service, Rail Operations, and Third Party Rail Operators utilizing the Metrolinx rail network.

3.4.3 Subcategories of Disruptive Possessions include:

1. **Special Routings**: Rail Corridor Access that requires a modification to the Rules of the Route and may require modifications to train movements without impacting service levels.
2. **Hourly Service:** Removal of one or more tracks from service while allowing all scheduled freight movements, VIA Rail train movements, UPX train movements, Niagara Falls Rail Services, and reduced off-peak GO revenue services. Hourly Service is only available where regular service is greater than hourly frequencies.
3. **Cancelled Service**: Temporary removal of one or more tracks from service, which may require the cancellation of some GO revenue services while still allowing all scheduled freight, VIA Rail, and UP Express train movement to proceed as scheduled.
4. **Full Closure**: Closure of all tracks and cancellation of all train GO movements on all MX-owned zones associated with a specific subdivision. VIA Rail train movements, UP Express Train Movements, and freight train movements may be cancelled or modified to allow movements with minimal impacts to Work vents. This type of closure may also be referred to as a Major Track Closure.
5. **Partial**: Closure of all tracks and cancellation of all train GO revenue services within only specific zone(s) in MX-owned subdivisions or, in the USRC, based on track availability as determined in coordination with the Service Modifications team. VIA Rail train movements, UP Express Train Movements, and freight train movements may be cancelled or modified with minimal impacts to planned Work vents.
6. **Special Disruption**: An impact to planned Railway Operations and does not fit into one of the above subcategories, however, a Business Justification must be submitted to and approved by Metrolinx. Such access could include, but is not limited to, platform closures, portal platform closures, modified schedules, long-term track closures, and track diversions.

4 Planning Timeframes and Responsibilities

4.1 Overview of the Planning Process

4.1.1 Planning for Rail Corridor Access occurs over five main planning horizons:

1. **Rail Corridor Access Plans** – an overview of the access required over the life cycle of a project submitted at the initiation of a project, when the contractor is onboarded, and annually through to the completion of the project in accordance with the access available as outlined in the EAS, for the purpose of network level service and access planning.
2. **Track Protection Forecast and Requirements** – a forecast for Track Protection that is provided by the Project Delivery Teams outlining the required Track Protection resources for a given period of time to allow for Metrolinx to work with their Track Protection contractors to ensure that staffing resources will meet future requirements.
3. **Disruptive Access Planning**
   a) **T-50 Disruptive Rail Corridor Access Request** – a formal submission by the Project Delivery Team at T-50, through the NAPT or RCAR, for Disruptive Access to be reviewed by RCAC.
   b) **Disruptive Access Planning Meetings (DAPM**) – meetings that will occur on a rolling basis at or around T-46, T-34, and T-22 weeks, to review planned protection, adjacent works, scope, project details, impacts to infrastructure, and impacts to operations. RCAC will deconflict adjacent Works and finalize the Rail Corridor Access arrangements. Copies of all projects and requests will be published and available for interested parties to review.
   c) **Disruptive Readiness Review** – a series of requirements between T-16 and T-4 where Teams demonstrate readiness to Metrolinx and receive a GO-NO-GO decision to proceed with the planned Works.
4. **T-8 Week Access Implementation Process** – the rolling T-8 planning process where projects are deconflicted, prioritized, and proceed through the T-8 planning coordination, T-3 flagging coordination, and T-1 GO-NO/GO meetings required to access the Rail Corridor within White Periods, Non-Disruptive Access, and Disruptive Access.
5. **Deviations and Unplanned Access:** Under exceptional circumstances, there may be a need for unplanned urgent Rail Corridor Access outside of the planning timeframes. Deviations and/or Unplanned Access fall into two categories: Emergency Rail Situations and Priority Situations.

4.2 Rail Corridor Access Plans

4.2.1 Rail Corridor Access Plans (RCAP) provide an overview of planned access over the life cycle of a Project or Works.

4.2.2 RCAP are submitted during the pre-binding agreement stage, updated at the post-binding agreement stage, and resubmitted annually, five weeks following the publication of the EAS, for each calendar year throughout the project life cycle based on actual productivity, modifications to scope, and key milestone achievements. See Appendix A for timelines.

4.2.3 The Engineering Access Statement (EAS) and Engineering Access Statement Standard (EASS) are provided to the Project Delivery Team. The Project Delivery Team are responsible for ensuring that the Rail Corridor Access Plans adhere to the Rail Corridor Access opportunities outlined in the EAS.

4.2.4 The Rail Corridor Access Plan and each subsequent update thereto shall identify each of the Project's requested Rail Corridor Accesses, including:

a) the type and scope of work to be carried out for each Rail Corridor Access;

b) the duration (s) of the Rail Corridor Access;

c) the location(s) of Rail Corridor Access and egress points, gates, barriers, and planked crossings applicable to the Work;

d) the Category and Subcategory of Access that will be required for each Rail Corridor Access;

e) the track(s) that are being requested;

f) the estimated flagging resources required for each Rail Corridor Access;

g) the Operational Restrictions and Impairments associated with each access request, or following a Disruptive Access event; and

h) the proposed start date, end date, start time, and end time for each Rail Corridor Access that is planned for the remainder of the Project.

4.2.5 Where a Project's Rail Corridor Access Plan identifies the need for Rail Corridor Access above and beyond the opportunities outlined in the Engineering Access Statement (EAS), including any Operational Restrictions and Impairments, the PDT must seek approval from Metrolinx through the EASS Business Justification process. PDT's must ensure that all key industry stakeholders are aware of the Rail Corridor Access requests outside of the published opportunities and approve of the request.

a) The Business Justifications will provide details on:

i. The proposed modification/addition to the draft EAS

ii. The reason why the Rail Corridor Access in the draft EAS is insufficient to meet the needs of the Project;

iii. The schedule advancement that will be achieved;

iv. The schedule and financial impact if the request is denied;

v. The operational impact (e.g. PSO/TSO/Test Train);

vi. The changes to infrastructure proposed to take place; and

vii. A task schedule proving the requirement for Disruptive Access.

b) Teams must have their Business Justification(s) signed off by their respective Vice President. CPG Project Delivery teams will further be responsible for presenting their Business Justification(s) to the CPG Rail Access Planning Team for coordination and approval. All teams will be responsible for presenting their Business Justification(s) through the EASS process for acceptance.

c) Where Business Justification(s) have been approved, Teams will be responsible for submitting their updated Rail Corridor Access Plans, including any approved modifications or additions of Disruptive Access.

4.2.6 Regulatory Maintenance will be required to submit a Rail Corridor Access Plan with a 1-year outlook, on an annual basis.

4.2.7 Inclusion of Access plans in either a draft or formal Rail Corridor Access Plan does not guarantee the Contractor such Access.

4.3 Track Protection Forecast and Requirements

4.3.1 Track Protection Forecast applies only to Works planning to source track protection through Metrolinx

4.3.2 Track Protection must follow the requirements outlined in the CROR and the MX GEI.

4.3.3 Within Metrolinx Territory, the Project Delivery Team shall submit a Track Protection Forecast, in respect of each location where the work will be undertaken. The Track Protection Forecast shall be submitted on a quarterly basis in accordance with the following:

a) on or before, July 31 for the Track Protection Forecast period between January 1 and March 31 of the following year;

b) on or before, October 31 for the Track Protection Forecast period between April 1 and June 30 of the following year;

c) on or before, January 31 for the Track Protection Forecast period between July 1 and September 30 of the current year; and

d) on or before, April 30 for the Track Protection Forecast period between October 1 and December 31 of the current year.

4.3.4 In Third Party Territory, the Track Protection Forecast will be submitted by the Project Delivery Team outlining the Track Protection requirements for each location where the Work will be undertaken. The Track Protection Forecast shall be submitted on an annual basis by December 1 of each year, covering the period between April 1 and March 31. In the event that the Project Delivery Team wishes to make any modifications to a Track Protection Forecast or an update thereto, the Project Delivery Team shall submit such forecast modification no later than 130 Working Days prior to the corresponding Work Event.

4.3.5 Due to the timelines required for flagging forecasting, teams are permitted to submit flagging forecasts per the above deadlines in anticipation of upcoming projects.

4.3.6 Project Delivery Teams are also permitted to submit flagging forecasts no later than five (5) Working Days after the binding agreement is signed by the Contractor for consideration for the use of available flagging resources that may have been underutilized by other projects. However, only flagging resources forecasted per the timelines in 4.3.3 and 4.3.4 will be guaranteed by Metrolinx and the Flagging Provider.

4.4 Disruptive Access Planning

4.4.1 Formal Application Request for Disruptive Access:

1. Disruptive Access must align with the available Rail Corridor Access set out in the Engineering Access Statement (EAS). Works requiring Disruptive Access shall follow the process outlined in the Engineering Access Statement Standard (EASS) to ensure that the access required will be accommodated in the EAS. Priority will be given to projects that are identified as requiring Disruptive Access through the EASS process.
2. After the EAS has been published, the calendar of opportunity for requesting disruptive access will be opened in the NAPT until T-50 weeks.
3. At T-50 Weeks, Contractors or Teams requiring Disruptive Access are required to submit their Rail Corridor Access application request via the Network Access Planning Tool or an RCAR, where permitted.
4. This application shall include, but is not limited to, the following:
    a) Project name;
    b) Point of Contact (POC);
    c) Date and Time;
    d) Subdivision;
    e) Working limits (Mileage);
    f) Access Point(s);
    g) Track(s) to be protected;
    h) Hour-by-hour breakdown of the Work, including any activities required to return the track and signals infrastructure back into service;
    i) Equipment and Machinery (including Work Trains, Yellow Plant, on-track, and off-track machinery, and the associated movements required); and
    j) Operational Impacts and Restrictions (including Track Slow Orders, test train requirements, and infrastructure changes).
5. Additional information may be required and coordinated at the Disruptive Access Planning meetings.

6. Following the expiry of the booking periods, any Disruptive Access published within the EAS which has not been requested by a Project Delivery Team will revert to the regular train schedule.
7. Contractors or Teams that do not require Disruptive Access but would like to piggyback on a Disruptive Access are permitted to submit their access application request at T-8 weeks per Section 4.5. However, requests submitted after the T-50 week deadline will not be guaranteed priority and may be declined if in conflict with a request submitted per the T-50 week deadline. Additionally, these requests will not have been part of the operational coordination and therefore may be impacted by Railway Operations.

4.4.2 Disruptive Access Planning Meetings

1. At T-46, T-34, and T-22 weeks to the Disruptive Possession the RCAC team will host Disruptive Access Planning Meetings for each Rail Corridor, to review Disruptive Access requests that have been formally submitted via the Network Access Planning Tool (NAPT) or if permitted by a Rail Corridor Access Request (RCAR). The purpose of the meetings are to confirm the requirements for Disruptive Access, confirm all Work Events to be completed within the Disruptive Access, determine Working Limits, stage gates, access locations, equipment storage, equipment movements, flagging coordination, and to resolve any conflicts and/or issues identified by the RCAC team.
2. Attendance at the Disruptive Access Planning Meetings by representatives for the Works with the ability to make decisions is mandatory. Projects that are not represented at this meeting will have their Disruptive Access requests cancelled.
3. At the Disruptive Access Planning Meeting, Contractors and/or PDTs will be expected to present information to justify their Disruptive Access requests. This information should be consistent with the information submitted in the NAPT or by RCAR.
4. The Rail Corridor Access and Control teams will:
   a) Confirm the requirement for a Disruptive Access Work Event;
   b) Discuss Rail Corridor Access requirements against planned Work Events;
   c) Identify conflicting requests and/or requirements and help determine priorities; and
   d) Take and circulate meeting minutes with key agreements and decisions.
5. Over the course of the Disruptive Access planning process, requesters and the RCAC team will work together to develop a comprehensive Disruptive Access plan which will include the following, if applicable:
   a) Work event ID;
   b) Project name & number;
   c) MX contact;
   d) Contractor;
   e) Working limits;

f) Protection limits;
g) Type of protection and protection requirements (e.g. R842/TOP);
h) Activity list;
i) List of machinery;
j) List of Work Trains and Yellow Plant;
k) Onsite working instructions;
l) Access point(s);
m) Access path and, if required, travelling TOP requirements;
n) Routing instruction details;
o) Conflicting work sites (distance requirements of participating work sites);
p) Number of flagging resources;
q) External flagging requirements (CN/CP);
r) Impact to signaling system and a list of all signals impacted;
s) CROR Rule 103g requirements;
t) TSO/PSO requirements and stakeholder approval;
u) In-Service certification arrangements;
v) Test train requirements;
w) Hour-by-hour schedule; and
x) Return to service plan and requirements (e.g. In-service testing and commissioning requirements).

6. At or before T-20 weeks, the Rail Corridor Access and Control team will issue a schedule of Works planned for the Disruptive Access and which are subsequently required to proceed through the Disruptive Readiness and T-8 planning processes.

4.4.3 Disruptive Access Readiness Review

1. Disruptive Access will be required to go through a readiness review process leading up to the execution of Works. This process is designed to ensure that Project Teams and Contractors have completed, or are in the process of completing, all necessary safety requirements, Rail Corridor Access requirements, and pre-Works requirements, leading up to a Disruptive Access.
2. Attendance at the required meetings by a knowledgeable representative from the PDT who has the authority to speak on behalf of the project is mandatory. Project Delivery Teams that do not provide such representation will have their Disruptive Access request cancelled.

3. An exemption to the Disruptive Access Readiness Review process will be provided to all projects that are required to participate in the Operations Readiness Panel (ORP) process provided that all of the requirements described in 4.4.2.5.a have been approved through the ORP process.

4. **T-16 Weeks: Readiness Review - Stage 1**

   a) At T-16 Weeks prior to a Disruptive Access, the Rail Corridor Access and Control Team will issue the formal reminder of the Readiness Review – Stage 2 requirements. At this time, Teams that are completing Work during a Disruptive Access event are required to have a clear understanding of the Readiness Review process and are permitted to submit any documentation for pre-review by the RCAC team ahead of the GO/NO-GO decision.

5. **T- 12 Weeks: Readiness Review – Stage 2**

   a) At T-12 weeks, the Rail Corridor Access and Control Team will host the Readiness Review – Stage 2 meeting, where Teams are required to provide:

      i. Review of Disruptive Access Plan as detailed in section 4.4.2.5

      ii. Final Workplan and hour-by-hour schedule for the breakdown of the Work;

      iii. Confirmed and approved Track Protection plan (type of Track Protection, implementation plan, flagging schedule/handover between shifts);

      iv. Gate access and travel plan for equipment, materials, and personnel;

      v. Return to service plan and requirements (e.g. In-service testing and commissioning requirements);

      vi. Confirmed and approved track infrastructure changes and impairments (e.g. if a TSO is required after the Work Event, Test train requirements, if the Work will leave new infrastructure in place, etc.);

      vii. List of required equipment, planned date of delivery to site, and staging location;

      viii. List of required materials and planned date of delivery to site, and staging location;

      ix. List of required resources/personnel;

      x. Pre-Works milestone schedule (a schedule of all Non-Disruptive and White Period Access Work that needs to be completed leading up to the Disruptive Access Work Event and timelines for when it will be completed).

      xi. Contingency Plans for Rail Corridor Access overruns, including identification of at what point in the hour-by-hour Work breakdown schedule, if progress has not been made to an identified point, a contingency plan will be enacted that prioritizes returning tracks to service.

b) The Rail Corridor Access and Control Team will provide the final GO/NO-GO decision, to be sent out in writing, within 2 business days of the Readiness Review – Stage 2 meeting, based on the completeness and acceptance of all requirements as outlined in section 4.4.3.5a)

6. **T- 4 Weeks: Readiness Review – Stage 3**

a) At T-4 weeks, Teams will submit, in writing, confirmation that all items agreed to in section 4.4.3.5a) remain unchanged and are ready to proceed to the Disruptive Possession. Teams that do not confirm in writing of their readiness to proceed, will have their Access cancelled.

4.5 T-8 Week Access Planning Process1.1

4.5.1 At T-8 weeks prior to the week where Rail Corridor Access will occur, the rolling planning process commences. This process includes the continuation of Disruptive Access planning in coordination with White Period and Non-Disruptive Access requests right through to the execution of all planned Rail Corridor Access.

4.5.2 T-8 Weeks: Request Submission

1. Access planning requests must align with the requirements outlined in the Metrolinx GEI, Engineering Access Statement, Haulage Trains Standard, and Hierarchy of Control. Access planning requests must demonstrate which level of the Hierarchy of Control has been designated for the requested Works through a risk assessment and provide an approved Business Justification for all Red Zone Working.
2. Formal Access Requests are to be submitted via the Network Access Planning Tool by Monday at 1200 or the prior Friday at 1200 in lieu of Monday Holiday and shall include the following:

a) Project name;

b) Date and time;

c) Detailed scope of work that will be performed for the specific requesting week;

d) Point of Contact (POC);

e) Canadian Rail Operating Rules (CROR) – Certified Metrolinx Personnel, or person deemed equivalent by RCAC, responsible for overseeing work;

f) Subdivision;

g) Flagging Territory;

h) Mileage or signal limits (working limits);

i) Tracks to be protected;

j) Proposed Protection Type;

k) Approved Red Zone Exemption form (if required);

l) Number of separated work groups;

m) Maximum number of workers;

n) List of equipment and machinery;

o) Hr x Hr Schedule for all equipment and machinery;

p) Work Plan Methodologies & Ground Disturbance Permits, including valid start and end dates;

q) Meeting location;

r) Access Point; and

s) NAPT Map markers highlighting work limits, location of machinery, continuous work zones, and meeting locations.

3. An hour-by-hour schedule is required for all equipment and machinery detailing the specific times when machinery and equipment will be moving within the Metrolinx Right-of-Way and the designated path for entering and exiting the work zone, including accessing the ROW through an approved access point.
4. Each access request must be limited to one type of protection. When planned works require multiple types of protection (E.g. R42 required 0900 to 1500, Foreman Oversight required outside of R842 limits from 0630 to 0900 and 1500 to 1630) this must be submitted as separate, individual requests.
5. The available track time for White Period Access is detailed within the Engineering Access Statement, and requested blocks must adhere to those times provided.
6. Project teams and contractors are responsible for submitting NAPT requests prescriptive with the work planned for each access event. Requests that are found not to be reflective of actual work will have their access requests denied. These requests are typically known as "blanket requests".

4.5.3 T-7 to T-4 Weeks: Planning & Scheduling

1. Planning & Deconfliction
   a) After reviewing the submitted Rail Corridor Access requests and the associated documentation, RCAC will:
      i. Confirm that all of the requirements for access have been met;
      ii. Coordinate all requested Work Events;
      iii. Identify conflicting requests; and
      iv. Facilitate planning meetings.
   b) Prior to the T-6 week and T-4 week planning meetings, the RCAC Team will provide a summary of the requests and conflicts for projects and contractors to review.

c) At the T-6 week and T-4 week planning meetings, RCAC will highlight the conflicting requests where coordination of activities is required. Where coordination is not possible, RCAC will review the locations and affected requests where prioritization of Works is required. For Works deemed a lower priority, RCAC will coordinate with the affected stakeholders to develop alternative options. If required, the requester will resubmit their updated Rail Corridor Access request. If an alternative solution cannot be coordinated, the lowest priority request will be cancelled.

d) Where required, the RCAC team may schedule additional planning meetings to ensure that all aspects of access have been coordinated by T-4 weeks.

e) Disruptive Access requesters will also provide an update on progress against their Pre-Works milestone schedule agreed to at T-16 weeks. Failure to meet milestones will result in the cancellation of the Disruptive Access.

2. Finalize Schedule

a) At the end of T-4 Weeks, on completion of the planning meetings, RCAC will update the Weekly Access Notice with the agreements made during the planning phase.

b) At T-4 weeks, all Work Events are considered finalized, which is formalized by the publication of the Weekly Access Notice.

3. Finalize Documentation

a) All documentation, including Work Plans, Ground Disturbance Permits, and Safe Work Packs, must be developed by the PDT and reviewed through the Operating Practices, Safety, Asset Management and Maintenance, and CMO processes. All documentation is to be signed off by Week 3, prior to the flagging coordination meeting.

b) The Contractors/access requesters will then make the final amendments to their Work Plan(s), Ground Disturbance Permit(s), and all other required permits based on the agreements made during the planning, if required. The Contractors/access requesters will update the Network Access Planning Tool or send the documents via email to confirm that the Work Plan has been finalized.

4.5.4 T-3 Weeks: Flagging Coordination

1. Only Work Events compliant with 4.5.3.3a) will proceed to the T-3 week Flagging Coordination meeting.
2. With the Rail Corridor Access requests finalized and priority Rail Corridor Access established, the RCAC Teams (or the Contractor, if self-flagging) will develop a flagging resource plan to efficiently apply Track Protection requirements.
3. Access requesters will be required to attend a T-3 Week Flagging Review Meeting to discuss Track Protection requirements and justify requested flagging. Failure to attend the T3 meeting will result in the cancellation of the work event.
4. At this stage, utilization data will be used to identify works that repeatedly request access to the corridor but do not utilize their Access. These works will have their work sites were modified or cancelled at the T-3 Week Flagging Review Meeting.

4.5.5 T-1 Weeks: GO-NO-GO Review and Issue the Final Access Pack.

1. At T-1 week, RCAC will hold a GO/NO-GO Meeting to provide a final review of the access plan, including all Work Events, coordination, protection, and arrangements agreed to throughout the T-8 planning process. This meeting will confirm that the pack accurately reflects the Work Event details as agreed to at the planning meetings and ensure all parties are aware of the full scope of Work, the approved access, and their responsibility in the execution of the plan in order to maximise safe delivery. Teams will also validate that equipment, personnel, and materials are confirmed and ready for the execution of the Works.
2. Any teams that fail to confirm the readiness of any item will have their Work Event cancelled and will have to re-submit their Work Event request per the timelines outlined in this standard, based on the type of Rail Corridor Access being requested.
3. The meeting will be chaired by RCAC. Attendance is mandatory for both the access requester as well as a representative for the Contractor. If a requester does not attend or RCAC identifies significant changes to the plan/package, RCAC will cancel the Works.
4. Following the T-1 GO/NO-GO meeting, a final Access Pack will be issued with all approved Rail Corridor Accesses.

4.5.6 T-0 Weeks: Execution of Works and the Management of Onsite Incidents

1. Contractors are to execute the planned Work Events according to the Weekly Access Pack (also known as the Weekly Work Events) and as per each Project's Work Plan methodology.
2. Management of Onsite Incidents Impacting the Access Event (Potential for Overrun):
   a) White Period and Non-Disruptive Access.
      i. In the event of a delay or change to a Work Event due to an incident onsite that impacts the Work Event and/or Track Protection arrangements the flagging personnel will escalate to the NOC Operations Controller & NOC Infrastructure Management who will coordinate any changes to the Work Event and Track Protection arrangements with RTC per the NOC Escalation process.
   b) Disruptive Access Arrangements.
      i. The Project Delivery Teams are to monitor and report progress of Disruptive Access Works against the hour-by-hour plan to RCAC, NOC Operations Controller & NOC Infrastructure Managers, providing reports on key milestone(s) to confirm progress against the plan. These updates are to be distributed at 4-hour intervals.
      ii. In the event of overrun or impact to service: if the Works are falling behind when compared against the hour-by-hour schedule, the competent supervisor, designated by the Contractor, is to provide support to try to recover the schedule from the slippage. At an agreed point in time in the hour-by-hour plan, the Project Delivery Team is to make the decision as to whether the Contingency Plan is to be enacted.

3. Modifications to Scheduled Protection Types.
    a) A Track Protection Worker (TPW) is not permitted to change the scheduled type of protection for their assigned duties while working within Metrolinx-owned corridors.
    b) In the event it is found that applying the planned protection will create a safety risk, TPWs are permitted to either cancel the work or use the most appropriate protection to address the safety risk. Once the safety risk is addressed, the TPW is required to notify their supervisor and RCAC's Flagging team as soon as possible.
    c) If a workgroup does not report on-site and has a Track Occupancy Permit (TOP), Safety Watch, or Rule 841 as a scheduled protection type, the TPW will cancel the Work Event and not enact the planned protection. Protection for work scheduled with Rule 842 will remain in place, regardless of a workgroup's presence.

4.6 Deviations and Unplanned Access

4.6.1 Deviations and unplanned requests will only be approved if deemed to be critical to the work event process or operations.

4.6.2 Access requests for deviations and unplanned work fall into two categories as defined below:
    a) An Emergency Access Request; and
    b) A Priority Rail Corridor Access Request.

4.6.3 The GO Transit Track Standards (GTTS) and Appendix B outline the process for Emergency and Priority access requests and the associated time required for Rail Corridor Access to be granted. Deviations and unplanned requests that do not fall into one of the categories identified in Appendix B will be evaluated based on Figure 1.

4.6.4 Emergency Access Requests

1. In the event of an Emergency Rail Situation, if the individual who has identified the emergency is CROR qualified, they are to follow CROR Rule 125: Emergency Communication Procedures. All other individuals are to call the RTC Manager Emergency Line on: 416-681-9700. They are to:
    a) Start the call with: "This is an Emergency Call"
    b) Provide your name, role, company, and location
    c) Provide details of what the emergency is and what assistance is required
2. The NOC will assist with organizing the required Access & Protection

4.6.5 Priority Access Requests

1. For priority access requests, the requester is to contact the RCACManagers@metrolinx.com as soon as reasonably practicable. The minimum information required to be provided is as follows:
   a) Business Justification;
   b) Preferred Date;
   c) Time;
   d) Single Point of Contact (SPOC) for the additional Work;
   e) Project; and
   f) Scope of additional Work.
2. RCAC planning will determine the earliest available Rail Corridor Access opportunity that reduces the likelihood of impact to customers, operations, and other surrounding Works.
3. The requester is to produce and submit an approved Work Plan no less than 24 hours prior to commencing Works. This is to ensure Works have been correctly risk assessed and safe to deliver.

Figure 1 – Criteria Guide for Deviations and Unplanned Requests

CRITERIA GUIDE		
ACCEPT	**DECLINE**	**EVALUATE**
• Emergent/Safety Critical • Damaged Infrastructure • Critical Switch Repairs – Service impacting defects • Geometry Testing defect repair(s) • Reported inspections that are overdue • Weather Patrols • Snow Clearing/Filling salt bins • Removing debris from the track • Damaged flag stands • Change in clear time • Emergent TSO signal placement/ removal	• Change in limits, times, protection, equipment, scope • Even if there are no conflicts/impacts to Operations/after-service/ accommodating all other works. • Maintenance works that are not reported to be overdue	• Equipment travel (TOP or extended limits) • TOP for adjacent track protection as determined by the flagman • Routing adjustment • R42 Flag placement and removal (should be planned if required)

Appendix A – Summary of Access Planning Timescales & Deadlines

A.1 Access Planning Timescales

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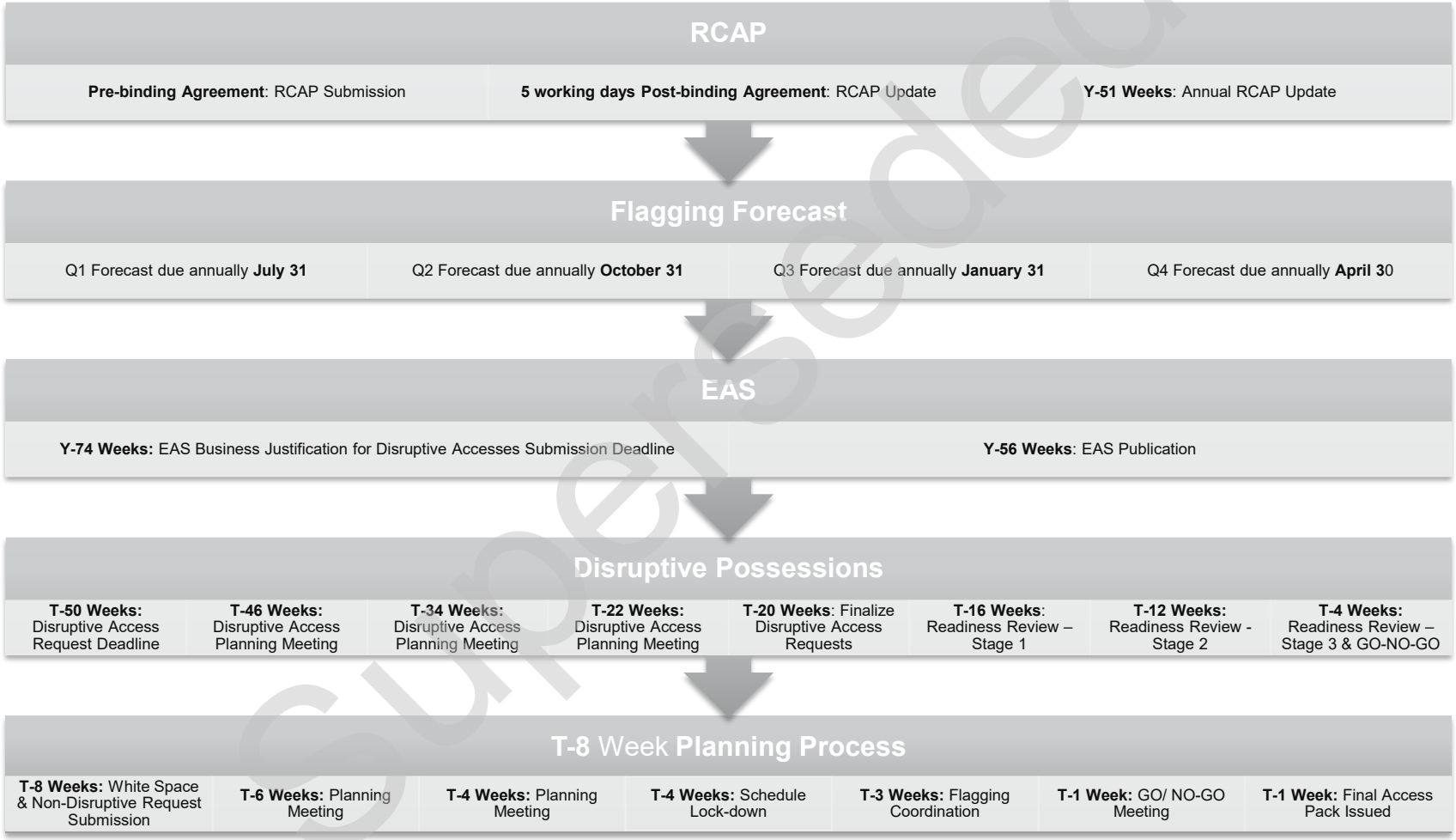

Appendix B – Category 1-4 Priority Access Categories & Planning Timescales

Category #1 0-24 hrs	Category #2 24-72 hrs	Category #3 3-7 days	Category #4 1-8 weeks
Infrastructure failures or asset impairment resulting in immediate revenue impact, example:	*Near-urgent defects found during regulatory patrols*	*Unforeseen infrastructure impairments warranting the application of class-reducing slow orders*	*Priority defects found during regulatory patrols*
In-service rail failures • **Rail Break** • **Defective weld** • **Pull apart** • **Signal failures** • **Correspondence loss** • **Etc.**	Follow-up repairs to urgent conditions	Drastic changes in temperatures that warrant escalated repairs, as defined by Track standards	Changes in the deterioration rate of asset performance requiring replacement/rehabilitation
Track buckles / sun kinks	Multiple classes reduce defect repairs	Near-urgent defects found during regulatory patrols	Priority detailed inspections identified during regulatory inspections
Damaged or vandalised assets	Support of defect repairs found during regulatory track geometry testing	Urgent structure repairs, including scaling of loose concrete, railing or walkway repairs, steel repairs, and bridge deck maintenance	Priority structure repairs, including railing/walkway repairs, scaling of loose concrete / concrete repairs, steel repairs, bridge deck maintenance, culvert coupler installation, scour / erosion protection, bridge jacking

Severe weather responses, patrols, remediations, etc.	Support of defect repairs found during regulatory ultrasonic rail testing	Urgent, detailed inspection was identified during regulatory inspections	
Rough track reports	Safety-critical infrastructure or adjoining asset repairs		
Bridge strike, bridge fire	Urgent structure repairs, including scaling of loose concrete, railing or walkway repairs, steel repairs, and bridge deck maintenance		
Urgent defects found during regulatory patrols	Urgent, detailed inspection was identified during regulatory inspections		
Third party influences affecting asset stability, Rail Corridor Access and performance. • **Internal Teams, CN, local municipalities, Hydro, Emergency services, etc.**	Critical vegetation management that has the potential to impact Train Movements.		
Improperly displayed, missing, damaged and, or incorrect protection flag(s)	Emergent equipment moves to support urgent repairs or to return equipment to where originally intended following urgent repairs.		

Appendix C – Access Planning Templates and Complementary Standards

C.1.1. The table below provides a summary of all the Rail Corridor Access planning templates. Templates are updated from time to time, and it is the Contractor's responsibility to ensure that it is using the most up-to-date version of each template.

Item	Name	Link
1	Contractor's Rail Corridor Access Plan	Link
2	Business Justification Template Business Justification Job Aid	Link
3	Track Protection Forecast Template	Link
4	Engineering Access Statement Standard	Link

Appendix D – Network Access Planning Tool (NAPT) Standard Operational Procedures and User Guide

Item	Template Name	Link
1	Network Access Planning Tool can be accessed here:	https://mx-access.com/
2	Network Access Planning Tool Resources (Training Guide and Standard Operating Procedures)	Link