

SMS-Template Instructions

INSTRUCTIONS IN THE USE OF THE SMS-001 MANUAL TEMPLATE

This model is intended for use as a template in developing the Manual for the ISO 45001:2018 Occupational Health and Safety management system (OHSMS).

The documentation package for the OH&S management system will contain:

- One Manual that will introduce and set the stage for the documentation that is required to meet the requirements for the ISO standard,
- A group of (18) procedures and (8) work instructions that are needed to meet the requirements for the OHSMS,
- A group of forms, attachments, registers, and flow diagrams needed for the procedures and instructions.

Note that the quantities of documents shown above are estimates and the final count will depend on the nature of your business.

The documentation will need to be developed and implemented. The first step is for a responsible person such as the OH&S team leader to become familiar with the manual model / template. You will note that the template is made up of a group of sections that make up the OH&S management system and each folder contains the relevant documents.

The three folders are:

- 1-OHS Manual-SMS-001,
- 2-OHS Procedures-Instructions,
- 3-OHS Forms-Attachments.

Included in the 1-OHS Manual folder is this 'Template-Instructions'. Also included are a matrix that reflects the 'Documentation Flow-Down' and the 'Docs-List'. Both will evolve as you develop your OHSMS.

Development of the OH&S Section of the Manual:

Once the OH&S team leader is familiar with the above documentation format, he or she initiates the development of your documentation.

The task of the OH&S team leader is to review the SMS-001 Manual document in Folder 1 and customize it as much as possible to reflect the unique nature of the management system for your company. To assist with this process, the areas that are typically unique and require special attention are highlighted in the text for the template.

Treat the [text in blue](#) as "revisions" or information that is specific to your company.

When the SMS-001 Manual is reworked to reflect your information, the document is reviewed by the OH&S team to familiarize them with the format and to obtain the inputs that will finalize the Manual sections and make them ready for approval by the responsible manager (typically, the top-ranking person in the organization).

This exercise or process that takes a manual section from review to final approval sets the stage for the next development tasks.

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With the OH&S team leader being familiar with the above documentation format, she / he initiates the development of your documentation for the OH&S portion of the system by considering the procedures and instructions that are contained in the Folder 2-OHS Procedures-Instructions.

The task for the OH&S team continues and becomes to systematically take one at a time the documents contained in Folder 2 and customize them to reflect your OHSMS. To assist with this process, the areas that are typically unique and require special attention are shown in "Blue Font" in the text for the documents.

Your OH&S section of the documentation package will gradually evolve from the template information into your very unique and specific and comprehensive management system.

Development of the Forms and Attachments for the procedures:

For the 3-Forms-Attachments folder that contains the forms and attachments, registers, and flow diagrams needed for the Manual and the procedures and instructions included in the previous Folder 2, the task of incorporating them will become relatively straight forward since they are general in nature and do not require a great deal of customization.

General

The above documentation development tasks for the ISO 45001:2018 Occupational Health and Safety Management System will take a considerable amount of time and will be facilitated through proactive direction from the OH&S team leader, the active participation from the OH&S Team, the assignment of responsibility for the procedures and instructions and the follow up through the regularly (weekly) team meetings.

For this follow up activity, the OH&S team leader, as the project manager makes use of project management techniques such as timing chart or action plan to ensure that responsibility is assigned, and promised dates met.

Good luck with your OHSMS project.