Integrating the

OCCUPATIONAL HEALTH AND SAFETY

Management system

with the existing

QUALITY Management System

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QUALITY MANAGEMENT SYSTEM

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OCCUPATIONAL HEALTH AND SAFETY

MANAGEMENT SYSTEM

Note:

The first 3 pages of the generic manual provide an introduction and guidance in its use and are to be removed from the Manual file (copied to a separate document or deleted) after use.

Guidance in the use of this template

This model is intended for use as a template in developing your Manual for the integration of the ISO 45001:2018 Occupational health and safety management system in the existing ISO 9001:2015 Quality management system.

The integration / implementation approach applies for the management systems where requirements are described in the standards:

- ISO 9001:2015 Quality Management Systems – Requirements.
- ISO 45001:2018 Occupational Health and Safety Management Systems – Requirements with guidance for use.

The above Management Systems are compatible with each other and have common requirements that are described in clause 4 through clause 10 and detailed in:

- Clause 4 Context of the organization
- Clause 5 Leadership (and Leadership and worker participation)
- Clause 6 Planning
- Clause 7 Support
- Clause 8 Operation
- Clause 9 Performance evaluation
- Clause 10 Improvement

You have your ISO 9001 QMS system in place and now have the objective of integrating the ISO 45001 OH&S in one comprehensive management system. The good news is that since you are familiar with formal systems, this initiative will be relatively straightforward.

Essentially, and depending on the nature of your business, the documentation package for the management system will contain:

- One (1) combined Manual for the integrated Management System with minor upgrades to reflect the QMS and the OH&S requirements.
- A group of (7) new QMS-OH&S procedures, (4) new OHS-specific procedures, and (3) new OHS-specific work instructions will need to be developed and implemented.
- A group of (20) forms, (4) attachments, and (2) registers needed for the procedures and instructions,
- A group of (7) existing procedures with minor updates to reflect the QMS and the OH&S requirements.

INSERT YOUR COMPANY NAME HERE

QUALITY and OH&S MANUAL
SMS-007

In this template, instructions / suggestions are outlined **in brown text** to provide examples of typical upgrades. Manual and other documentation upgrade instructions are included following the last section E of the manual to cover the integrated QMS-OHS common requirements and the new ISO 45001:2018 health and safety requirements.

In addition, the **blue text** needs to be replaced with your information where for example, use your company name in the spot indicated as "***Your Company***".

Consider the text in **brown as ISO 45001 "additions**" to the documentation and treat the **text in blue as "revisions"** or information that is specific to your company.

*Text in **black italics** represents other general instructions for the particular section.*

The next page of this template will become the first page of your Manual for the Quality and Occupational Health and Safety Management System as an integrated management system (IMS).

For document control purposes, the Manual is identified as **SMS-007**.

QUALITY MANAGEMENT SYSTEM

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OCCUPATIONAL HEALTH AND SAFETY MANAGEMENT SYSTEM

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MANUAL

Type Your Company Name
Street Address
City, State Zip
Here

QUALITY and OH&S MANUAL
SMS-007

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Introduction

GUIDELINES FOR OPERATIONAL CONTROLS	Date Approved _____	DATA Form A-800-001

The company considers the different operations and activities contributing to its identified significant health and safety impacts when developing or modifying operational controls and procedures.

Such operations and activities may include:

- R & D design and engineering
- Purchasing / procurement / outsourcing
- Contracting
- Raw materials handling and storage
- Production and maintenance processes
- Laboratories
- Storage of products
- Transportation
- Marketing, advertising
- Customer service
- Acquisition, construction or modification of property and facilities

Activities can be divided into three categories:

- Planning activities to continually improve the OHSMS when managing new capital projects, process changes and resources management, property (acquisitions, divestitures, property management), and new products and packaging.
- Daily management activities to assure conformance to internal and external requirements, and to ensure their efficiency and effectiveness.
- Strategic management activities to anticipate and respond to changing health and safety requirements.

INSERT COMPANY NAME/LOGO HERE

ALERT REPORT - AR
Department:
Date: Time:
Nature of the Alert: (Including causes if known) _____ _____ _____
Description of Action Taken: (Including corrective action) _____ _____ By Whom: _____ Date: _____
Alert reported by: _____ Alert reported to: _____ Names of Witnesses: _____, _____, _____, _____
Above section completed by: _____ Date: _____
SEND THIS COMPLETED FORM TO THE IMS TEAM LEADER
Alert Sent to: _____ Name of IMS team leader Date: _____
TO BE FILLED OUT BY THE IMS TEAM LEADER Does the incident involve a regulatory noncompliance? YES [ ] NO [ ] Provide reason(s) for decision: _____ _____
If YES, a non-conformance report, F-740-004 is required to continue with the investigation process.
If NO, a corrective action is required with the Corrective Action request, F-1020-001.
To meet compliance obligations, is there a need to notify a Regulatory Authority? YES [ ] NO [ ] If yes, what is the authority? _____
When was the alert reported to? A) The Regulatory Authority: Date & Time: _____ B) Top Management: Date & Time: _____
This section completed by IMS team leader: _____Date: _____

1.0 Purpose/Scope

1.1 The purpose of this procedure is to establish the process for the planning of the actions to address the planning required for the OHSMS at Your Company.

1.2 The procedure applies to the processes required to be planned and implemented to meet the OHS management of risks objectives of the integrated management system (IMS).

2.0 Responsibilities and Authorities

2.1 The IMS team leader has the prime responsibility and approval authority for this procedure.

2.2 Additional responsibilities for the IMS team leader and the IMS team are detailed in relevant paragraphs of section 5.0 below.

3.0 References and Definitions

3.1 This document addresses clauses 6.1 and 6.2 of the ISO 45001:2018 standard covering hazard identification, risk assessment and controls, identification of opportunities, legal and other requirements, and OH&S objectives and program action plans.

3.2 Risk: Effect of uncertainty on objectives

3.3 Risks and opportunities: Potential adverse effects (threats) and potential beneficial effects (opportunities).

4.0 Resources

4.1 None

5.0 Instructions

5.1 In support of the IMS team leader the IMS team determines the risks and opportunities associated with the identified health and safety hazards, legal and other requirements, objectives, and programs to ensure that the IMS can achieve the intended outcomes.

5.1.1 In support of the IMS team leader the IMS team ensures that a process is in place for the on-going proactive identification of hazards.

- During the development and implementation phases of the IMS, the identification and tracking of relevant hazards is followed up at the regular (weekly) IMS team meetings.
- Notes or minutes of IMS team meetings provide the evidence that hazards are identified and addressed.

1.0 Purpose/Scope

1.1 The purpose of this procedure is to establish the process for the monitoring, measurement, analysis, and evaluation of the OHSMS processes at Your Company.

1.2 This procedure applies to the monitoring, measurement, analysis, and evaluation activities where performance is evaluated and required to meet the objectives of the OHS as an integrated management system (IMS).

2.0 Responsibilities and Authorities

2.1 The OH&S team leader has the prime responsibility and approval authority for this procedure.

2.2 In support of the OH&S team leader, the OH&S team is responsible for identifying the appropriate monitoring, measurement, analysis, and evaluation processes.

2.3 Additional responsibilities for the OH&S team are detailed in relevant paragraphs of section 5.0 below.

3.0 References and Definitions

3.1 This document relates to clause 9.1 of the ISO 45001:2018 standard covering monitoring, measurement, analysis, and evaluation.

3.2 No definitions

4.0 Resources

4.1 None

5.0 Instructions

5.1 In support of the planning procedures P-615 for OHS-Risk management planning, and P-815 for OHS-Operational planning and control, this procedure addresses the monitoring, measuring, analysis and evaluation of OH&S performance.

5.1.1 The OH&S team determines what needs to be monitored and measured, as related to the identified hazards and their risks and opportunities, the fulfillment of legal requirements, the effectiveness of operational controls, and progress made towards measurable OH&S objectives.

5.1.2 The OH&S team determines the methods for monitoring, measurement, analysis, and evaluation that ensure valid results, the criteria against which the OH&S performance is evaluated, when the monitoring and measuring is performed, and when the results are analyzed and evaluated.

REGISTER OF LEGAL OBLIGATIONS

1. General Guidelines Information

The identification of compliance obligations, legal and other requirements and the evaluation of their significance associated with the activities, operations, products or services consider mandatory requirements issued by governmental entities or other relevant authorities, such as:

- Law and regulations,
- Permits, licenses or other forms of authorization,
- Orders, rules or guidance issued by regulatory agencies,
- Judgments of courts or administrative tribunals,
- Treaties, conventions and protocols.

Compliance obligations also include other interested party requirements related to its identified hazards, which the company chooses to adopt such as:

- ISO international standards
- Agreements with community groups or non-governmental entities,
- Agreements with public authorities and customers,
- Organizational requirements,
- Voluntary principles or codes of practice,
- Voluntary labeling or environmental commitments,
- Obligations arising under contractual arrangements with the company,
- Relevant organizational and industry standards.

2. The register of applicable legal obligations.

The register, R-613 contains the completed worksheets (see next page) for the identification of legal requirements, compliance regulations and represents a composite listing of the applicable requirements for the IMS.