**Instruction (delete):**

* *This template has been developed to enable you to schedule recurrent activities required under ISO Management System Standards.*
* *The template was originally developed for ISO 45001:2018. It can be used as an integrated tool (i.e. can also be used for ISO 9001 or ISO 14001).*
* *If using for ISO 22001 (Food Safety) or ISO 27001 (Information Security), you will need to additional actions.*
* *Additional actions will need to be added depending on the nature of your operational processes, safety hazards and equipment etc (particularly under Operation).*

*\* denotes review periodically, or when change occurs.*

*\*\* could be actioned during the management review process.*

| **ACTION** | | | | **WHO** | **DURATION** | | Jan | | Feb | | March | | | April | | May | | June | | | July | | Aug | | Sept | | Oct | | | Nov | | | Dec | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **General** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| *E.g. External audit* | | | | *E.g. Compliance Manager*  *Other managers and staff* | *e.g. 1.5 days per annum* | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
|  | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| **Context of the Organisation** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Review internal and external issues\*\* | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| Review needs/expectations of workers and interested parties\*\* | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
|  | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| **Leadership and Worker Participation** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Further opportunities for top management to show leadership as per 5.1.1 | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| Induction of new management personnel | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| Review Policies\* | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| Roles, responsibility and authorities\* | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| Consultation and participation of workers (identify specific consultation and participation forums/ processes) | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| See also Management Review (below) | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
|  | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| **Planning** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Review actions to address risks and opportunities (progress on actions, new risks/opportunities)\*\* | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| Review hazard and risk assessments\* | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| Review legal and other requirements\* | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| Review action taken on objectives and evaluate progress\*\* | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
|  | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| **Support** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Review resource requirements\* | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| Review Training and Competency Plan(s)\*\* | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| Documentation\*\* | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
|  | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| **Operation** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Review processes supporting the Management System\*\* | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| Review control measures. Are they effective and working as planned?\*\* | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| OHS controls - equipment: lifting gear, chains, slings, electrical cords etc | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| Emergency control equipment (fire extinguishers, fire hoses, alarms etc)  Evacuation processes | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| Testing emergency response and evacuation processes | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
|  | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| **Performance Evaluation** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Review internal audit program | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| Evaluate compliance | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| Internal Audit – against ISO Standard (e.g. ISO 9001, ISO 14001 or ISO 45001) | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| Internal Audit – OHS system and operational processes | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| Management Review | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
|  | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| **Improvement** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Review status of incident investigation and corrective actions\*\* | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
| Review progress on improvement \*\* | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
|  | | | |  |  | |  | |  | |  | | |  | |  | |  | | |  | |  | |  | |  | | |  | | |  | | |
|  |  | |  | | | | |  | |  | |  |  | |  | |  | |  | | |  | |  |  |  | |  | | |  | | |  | | |  | |  | | |  | |  | |  | |  | |  | |  | |  | | |  | |  | |  | |  | |  | |  | |  | |  | | |  | |  | |  | | | | | | | | | | |
| **Key** | |  | | | |  | | | | | | | | | | | | | |  | | | | | | | | |  | | |  | | |  | | |  | |  |  | |  | |  | |  | |  | |  | |  | |  |  | |  | |  | |  | |  | |  | |  | |  | |  |  | |  | |  | |  |  |  |  |  |  |  |  |  |  |
| P = Planned | | C = Completed | | | |  | | | | | | | | | | | | | |  | | | | | | | | |  | | |  | | |  | | |  | |  |  | |  | |  | |  | |  | |  | |  | |  |  | |  | |  | |  | |  | |  | |  | |  | |  |  | |  | |  | |  |  |  |  |  |  |  |  |  |  |