6.3   Modification of existing ISO 9001:2008 Forms

If you configured your ISO 9001:2015 Upgrade Package to include the ISO 9001 Forms Collection, please customize the entire ISO 9001 Forms Collection with the help of the included customization instructions.

Skip this section and then continue with chapter 6.4.

The following section only applies if you didn't configure your ISO 9001:2015 Upgrade Package to include the ISO 9001 Forms Collection.

Some of your existing ISO 9001:2008 forms may need some minor modifications in order to make them comply with ISO 9001:2015 requirements. We prepared the following modification instructions for two different situations:

(A) you are currently using our old ISO 9001:2008 Forms Collection; or

(B) your existing ISO 9001:2008 forms are not based on our materials.

Please modify the text of your existing ISO 9001:2008 forms per our instructions below in order to upgrade your existing forms to ISO 9001:2015.

A) Instructions for users of our ISO 9001:2008 Forms Collection

Modification of ISO 9001:2008 Forms Collection:
Training Plan and Record - New Hire
Update the form "Training Plan and Record - New Hire" with the following changes and additions:

- Change the name of the recommended introductory DVD course to "ISO 9001:2015 Basics - What Employees Need to Know"

- Add a bullet point: "Explanation of relevant Quality Objectives"

- Add a bullet point: "Discussion of employee's contribution to the ISO 9001 system and implications of not conforming to ISO 9001"

- Add a bullet point "Review employee performance objectives"

Modification of ISO 9001:2008 Forms Collection:
Local Management Review Agenda
The following changes need to be made to the form "Local Management Review Agenda":

- Under "Metrics" add the following at the very top: "Strategic objectives of the business unit"

- Add the following agenda item: "Adequacy of resources"

Modification of ISO 9001:2008 Forms Collection:
Corporate Management Review Agenda
The following changes need to be made to the form "Corporate Management Review Agenda":

- Under Metrics, add the following at the very top: "Strategic objectives"

- Change the bullet point "Changes that could affect the quality management system" to "Changes of internal and external factors (as shown in the Corporate Environment Form)"

- Add the following agenda item: "Actions taken to address risks and opportunities (as shown in the Risk Management Matrix and the Opportunity Management Matrix)"

B) Instructions for users of other ISO 9001:2008 forms

Training plan for new employees
If you have a form that's used to plan the training of new employees, please add the following new training requirements:

- Introductory training in ISO 9001:2015 (note: our DVD course to "ISO 9001:2015 Basics - What Employees Need to Know" is ideal for this purpose so you may list it as training requirement)

- Explanation of relevant Quality Objectives

- Discussion of employee's contribution to the ISO 9001 system and implications of not conforming to ISO 9001

- Review employee performance objectives

Management reviews
Since your company has several physical locations, it may be useful to set up a two-tiered management review system: you could have local management reviews that address local issues in addition to corporate management reviews that address corporate-wide issues.

If you want to implement the local and corporate management reviews, you will also need to update your ISO 9001 procedure on management reviews to reflect this change. As for the management review form and agenda, please first update your existing management review form/agenda per the following instructions, then create a local version from which all corporate topics are removed.

Instructions on updating an existing agenda and form for management reviews:
Add the following items to your management review agenda and/or management review form:

- Under the topic of metrics add the following: "Strategic objectives and other metrics"

- Add the following topic: "Adequacy of resources"

- Add the following topic: "Actions taken to address risks and opportunities (as shown in the Risk Management Matrix and the Opportunity Management Matrix)"

- End of Sample -