

# A specimen of the ISO 45008 preparation kit

Five rows from the live record. The paid kit carries all 40 clause-level records, the full evidence list and the dated plan.

SPECIMEN: NOT THE FULL KIT, NOT YOUR DATA

|                  |                                                                                                                                        |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| RECORD DATE      | 2026-10-20                                                                                                                             |
| CURRENT STANDARD | ISO 45001:2018, the management system standard the guidance supports                                                                   |
| DRAFT            | ISO/DIS 45008, Edition 1, stage 40.60, close of voting 19 May 2026                                                                     |
| PLANNING DATE    | 13 September 2027 (planning estimate, not an ISO date)                                                                                 |
| TRANSITION       | None. The guidance is not certified against and does not change an ISO 45001 certificate.                                              |
| SOURCES          | ISO page 64363; BSI project scope; BSI consultation release; ISO 45001:2018 clause record; ISO 45003 for the psychosocial preparation. |
| LICENCE          | One organization, internal use and its consultants. Not for resale. The standard text remains ISO's.                                   |

**What this is.** A register of the requirements that apply today, the evidence an auditor asks for, the common gaps and a dated preparation plan. The requirements are our words, not ISO's. The draft text is not public and is not reproduced, and no 45008 clause number is claimed. Dates marked estimate are derived from the public stage record. **Not legal advice; does not certify.**

## What is inside

- **The register:** 5 rows, each with the clause, the requirement in our words, the remote overlay, an owner and a due date.
- **The gap list:** 14 common failures, each with an action and an owner.
- **The evidence list:** 21 records an auditor asks for, by clause.
- **The dated plan:** 6 milestones from the population list to the review after publication.

## How to use it

Start with the register. Put an owner and a due date on every row that is not already evidenced. Use the evidence list to collect the records, the gap list to decide what to fix first, and the plan to sequence the work. Re-check the ISO stage at the planning date; the change watch tells you when the record moves.

## Obligation register (specimen: five rows)

| REF              | CLAUSE  | CLAUSE TITLE                                        | REQUIREMENT IN OUR WORDS                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | REMOTE OVERLAY                                                              | OWNER | DUE |
|------------------|---------|-----------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|-------|-----|
| ISO45001-4.3     | 4.3     | Determining the scope of the OH&S management system | In defining the scope, the organization works out where the system's boundaries lie and what it applies to, taking into account its external and internal issues, the requirements of interested parties, and the work-related activities it plans or carries out. The system covers those activities, products and services that the organization controls or influences and that can affect its OH&S performance, and the scope is available as documented information.                                                                                                                                                                                                                                                                                                                                         | Which remote workers and places are inside the boundary Public scope        |       |     |
| ISO45001-6.1.2.1 | 6.1.2.1 | Hazard identification                               | The organization sets up, runs and keeps a continuous, forward-looking process to identify hazards. It takes into account social factors and how work is organized, covering work organisation and workload, working hours, bullying, harassment and victimisation; leadership and the culture of the organization; human factors and how work is actually performed; routine and non-routine activities; past incidents; possible emergencies; workers, contractors, visitors and others; the design of workplaces, equipment and processes; changes; and changes to legal requirements, actual or proposed.                                                                                                                                                                                                     | Hazards of the home, the mobile workplace and the third place Reported area |       |     |
| ISO45001-7.4.2   | 7.4.2   | Internal communication                              | The organization shares information about its OH&S management system internally across its levels and functions, changes to the system included where appropriate, and makes sure its communication processes let workers play a part in continual improvement.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Check-ins are a control, not a courtesy Reported area                       |       |     |
| ISO45001-8.2     | 8.2     | Emergency preparedness and response                 | The organization sets up, runs and keeps the processes it needs to get ready for, and respond to, possible emergencies identified under 6.1.2.1. This includes: setting a planned response, first aid included; training people in that response; testing and exercising the capability to respond at intervals; assessing how the response performed and revising it after tests and after real emergencies; telling workers what their duties and responsibilities are; passing relevant information, as appropriate, to contractors, visitors, emergency services, government authorities and the local community; and, when the planned response is developed, taking account of what every relevant interested party needs and is able to do. Documented information on the processes and the plans is kept. | An emergency plan for a place you do not control Reported area              |       |     |

| REF            | CLAUSE | CLAUSE TITLE | REQUIREMENT IN OUR WORDS                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | REMOTE OVERLAY                                                    | OWNER | DUE |
|----------------|--------|--------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------|-------|-----|
| ISO45001-9.1.1 | 9.1.1  | General      | The organization sets up, runs and keeps processes for monitoring, measuring, analysing and evaluating performance. It decides what is to be monitored and measured (including how far legal and other requirements are met, activities and operations linked to identified hazards, risks and opportunities, progress on objectives, and how effective operational and other controls are); which methods will give valid results; the criteria against which performance is judged; when monitoring and measuring take place; and when the results are analysed, evaluated and communicated. It evaluates its OH&S performance and how effective the system is, makes sure that equipment used to monitor and measure is calibrated or verified, used correctly and properly looked after, and keeps documented information as evidence. | Measure the remote population, not the site average Reported area |       |     |

Source for every row: ISO 45001:2018, clause record, retrieved 2026-10-20. Remote overlay: the public 45008 record. Not legal advice; does not certify.

Common gaps (specimen: five clauses)

| CLAUSE  | COMMON GAP                                                                   | ACTION | OWNER |
|---------|------------------------------------------------------------------------------|--------|-------|
| 4.3     | High-risk activities carved out of scope without justification               |        |       |
| 4.3     | Scope names locations but not activities                                     |        |       |
| 4.3     | Work performed at customer sites excluded                                    |        |       |
| 6.1.2.1 | Psychosocial and ergonomic hazards omitted                                   |        |       |
| 6.1.2.1 | Visitors, public and contractors not assessed                                |        |       |
| 6.1.2.1 | Hazard ID treated as annual rather than ongoing                              |        |       |
| 7.4.2   | Communication is top-down only                                               |        |       |
| 7.4.2   | System changes not communicated to affected workers                          |        |       |
| 8.2     | Plans cover fire only, not the scenarios identified in hazard identification |        |       |
| 8.2     | Drills held but never evaluated or used to revise the plan                   |        |       |
| 8.2     | Visitors and contractors not covered                                         |        |       |
| 9.1.1   | Only lagging indicators measured                                             |        |       |
| 9.1.1   | Effectiveness of controls never evaluated                                    |        |       |
| 9.1.1   | Monitoring equipment uncalibrated                                            |        |       |

## Evidence list (specimen: five clauses)

| CLAUSE  | CATEGORY                | RECORD AN AUDITOR ASKS FOR                                                               | OWNER |
|---------|-------------------------|------------------------------------------------------------------------------------------|-------|
| 4.3     | Scope definition        | Documented scope statement covering sites, activities and workers                        |       |
| 4.3     | Scope definition        | Justification for any activity outside scope                                             |       |
| 4.3     | Scope definition        | Evidence the scope covers contractors and off-site work under the organization's control |       |
| 6.1.2.1 | Hazard identification   | Documented hazard identification procedure                                               |       |
| 6.1.2.1 | Hazard identification   | Hazard registers by site and activity                                                    |       |
| 6.1.2.1 | Hazard identification   | Job hazard analyses / task risk assessments                                              |       |
| 6.1.2.1 | Hazard identification   | Records covering routine, non routine, emergency, contractor, visitor, public            |       |
| 6.1.2.1 | Hazard identification   | Psychosocial and ergonomic hazard assessments                                            |       |
| 6.1.2.1 | Hazard identification   | Worker reported hazard logs                                                              |       |
| 7.4.2   | Internal communication  | Toolbox talks, briefings and bulletins with attendance                                   |       |
| 7.4.2   | Internal communication  | Communication of system changes                                                          |       |
| 7.4.2   | Internal communication  | Channels for workers to raise suggestions and evidence they are acted on                 |       |
| 8.2     | Emergency preparedness  | Emergency plans per identified scenario including first aid                              |       |
| 8.2     | Emergency preparedness  | Drill and exercise records with evaluations                                              |       |
| 8.2     | Emergency preparedness  | Revisions to plans after drills and real events                                          |       |
| 8.2     | Emergency preparedness  | Training records for response roles                                                      |       |
| 8.2     | Emergency preparedness  | Communication to contractors, visitors and external services                             |       |
| 9.1.1   | Performance measurement | Monitoring and measurement plan with methods, criteria and frequencies                   |       |
| 9.1.1   | Performance measurement | Leading and lagging indicator reports                                                    |       |
| 9.1.1   | Performance measurement | Calibration and verification records for monitoring equipment (noise, gas, exposure)     |       |
| 9.1.1   | Performance measurement | Records of analysis and communication of results                                         |       |

Dated plan

| DATE              | MILESTONE                                           | WHAT IT MEANS                                                                                                                                                                                                                                              | RECORD TO KEEP                                                         | DONE |
|-------------------|-----------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|------|
| 2026-11-30        | Confirm the remote population and the boundary      | List the worker groups that work remotely on a recurring basis and the locations they use. Decide which are inside the system, record the basis, and note any group excluded as occasional offsite work or a business trip.                                | A dated population list with an owner for each group.                  |      |
| 2027-01-31        | Assess the remote workplace and the work            | For each group, record the assessment method, the criteria, the result and the review trigger. Cover the workstation, the environment, the work and the psychosocial risk, including isolation, workload and the work-life boundary.                       | A current assessment per group, with the evidence the worker supplied. |      |
| 2027-03-31        | Supply the controls and test the route              | Set the equipment standard, the check-in rhythm and the reporting route. Record what reached each worker, and test the route from a remote location. Confirm who pays for equipment and how a worker reports an unsuitable item.                           | An equipment and check-in register, and a tested report.               |      |
| 2027-06-30        | Audit the remote experience and review the evidence | Add a remote sample to the internal audit: interview workers, trace one report, read the assessments and the equipment records. Take the remote indicators, the consultation feedback and the legal position for each jurisdiction into management review. | An audit report with a remote section and a management review minute.  |      |
| 2027-09-13        | Check the ISO stage at the planning date            | The planning date is an estimate. Check stage 40.92, 40.93, 40.99, 50.00, 50.60 and 60.60, and read the published text when it lands. Update the overlays and the procedures if the scope or the subject areas changed.                                    | A dated stage note and the update list.                                |      |
| After publication | Update the references and close the loop            | Compare the published guidance with this record and update the procedures, the assessment and the training. Keep the ISO 45001 certificate and its surveillance cycle; the guidance does not create a transition deadline.                                 | A signed update record and the next review date.                       |      |

**After publication.** Replace the planning date with the date ISO records at stage 60.60, read the published guidance, update the overlays and the clause references, and keep the ISO 45001 certificate and its surveillance cycle. The register is a working document, not a certificate.