

[organization logo]

[organization name]

**Commented [45A1]:** All fields in this document marked by square brackets [ ] must be filled in.

## PROCEDURE FOR DETERMINING THE CONTEXT OF THE ORGANIZATION AND INTERESTED PARTIES

**Commented [45A2]:** To learn more about context of the organization, see:

Defining the context of the organization according to ISO/DIS 45001  
<https://advisera.com/45001academy/blog/2016/02/03/defining-the-context-of-the-organization-according-to-isodis-45001/>

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<http://advisera.com/conformio>

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### Distribution list

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## Change history

Date	Version	Created by	Description of change
	0.1	45001Academy	Basic document outline

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## 1. Purpose, scope and users

The purpose of this document is to define the process of identification and determination of the internal and external context of the organization, as well as needs and expectations of interested parties related to the Occupational Health and Safety Management System (OH&SMS).

This document is applied to the entire Occupational Health and Safety Management System (OH&SMS).

Users of this document are the top management of [organization name].

## 2. Reference documents

- ISO 45001:2018 standard, clauses 4.1; 4.2
- OH&S Manual

## 3. Context of the organization

### 3.1. Internal context

[Job title] is responsible for identifying and considering internal issues of the organization that can affect its ability to achieve the intended results of the Occupational Health and Safety Management System. Internal issues are those that are under the organization's control and that affect the organization's ability to achieve the intended results of the Occupational Health and Safety Management System.

The internal context of the organization is the internal environment in which [organization name] operates. It includes the organization's internal environment, including its organizational structure and roles, internal resources, and internal risks and opportunities.

Internal context includes, but is not limited to:

- Products and services
- Organizational structure, roles, and responsibilities
- Leadership
- Internal resources
- Internal risks and opportunities
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### 3.2. External context

The external context of the organization includes external institutions or influences that can affect the Occupational Health and Safety Management System in [organization name] and its ability to achieve the intended business and OH&S objectives.

The external context consists of two components:

- **Immediate external environment:** Includes direct and immediate influences on business and activities of organization, such as regulatory, legal, contractual, and other requirements, and needs and expectations of interested parties.
- **General environment:** Includes economic, political, legal, social, and other conditions that may influence organization's work.

### 3.3. Identification of workers and other interested parties

[Job title] is responsible for identifying all persons or organizations, besides the workers, that can affect or be affected by organization's work. Activities regarding the occupational health and safety, as well as their needs and expectations, and identifying which needs and expectations of the interested parties become compliance obligations.

[Job title] defines who is responsible for compliance with each individual requirement, and which interested parties are to be notified when changes occur.

[Job title] must be in compliance with all requirements, interested parties, contractual obligations, and regulatory services in the area of interested parties, legal and other requirements.

[Job title] must, at least **twice a year**, conduct a conformity evaluation with legal and other requirements and enter the results in the Compliance Evaluation Record. If there are legal or other requirements with which organization's work does not comply, job title will notify top management, who will make further decisions.

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The deadline for complying is **eight days** from the day when the noncompliance is registered.

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If meeting the requirements with legal and other requirements, addresses the authority of job title, and/or requests of an engaged interested party, a decision will be made by top management.

Every employee in [organization name] must notify [job title] if he/she comes across any new legal, regulatory, contractual, or other requirement that might be relevant to the Occupational Health and Safety Management System.

### 3.4. Consideration of the context of the organization

[Job title] determines which factors of the context organization's work can influence, and to what extent it must adapt in order to achieve its objectives. The determining context includes opportunities and risks emerging from the organization's work, job title will use a **SWOT**.

(Strength, Weakness, Opportunities, Threats) Analysis.

**Commented [45A9]:** This is a recommendation; the organization may use other methods, e.g., PEST analysis, Porter's "Five Forces Model," etc.

[organization name]

The context of this organization must be taken into account during activities of the scope of the Occupational Health and Safety Management System.

#### 4. Managing records kept on the basis of this document

Record name	Code	Storage		Responsibility
		Retention time	Location	
List of Interested Parties, Legal and Other Requirements	PR.04.1	2 years	[office of [job title]]	[job title]
Compliance Evaluation Record	PR.04.2	2 years	[office of [job title]]	[job title]
Scope of the OH&S Management System	PR.04.3	2 years	[office of [job title]]	[job title]

**Commented [45A10]:** If the record is in electronic form, write the name of the folder on [job title]'s computer.

**Commented [45A11]:** If the record is in electronic form, write the name of the folder on [job title]'s computer.

**Commented [45A12]:** If the record is in electronic form, write the name of the folder on [job title]'s computer.

#### 5. Appendices

- Appendix 1 – List of Interested Parties, Legal and Other Requirements
- Appendix 2 – Compliance Evaluation Record
- Appendix 3 – Scope of the OH&S Management System