

Sample Templates for Your Health & Safety Program have been developed by the Workplace Safety & Insurance Board's Prevention Division to assist firms in the following programs: *Workwell*, *Safety Groups*, and *Safe Communities Incentive Program*.

Copies of this booklet are only available from these programs:



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INTRODUCTION

This guide is a resource to help you prepare for the Workwell Health and Safety Audit. It is intended to assist in the development of a health and safety program that will satisfy the Workwell Audit. The information presented here describes the minimum criteria required to meet the expectations of the audit.



This guide describes the components of a health and safety program and its relationship to the audit. Although employers may enhance their program above minimum requirements, this guide does not provide specific technical or legislative standards, nor does it provide a prescriptive implementation process. Legislation sets the minimum standards. Implementation of your program will vary depending on your company size, number of facilities, type of industry and resources.

Workwell requires that all elements of the health and safety program be documented, communicated, trained as required and implemented. Development of a health and safety program, without communication, implementation, and documentation (record keeping) will result in a zero score. The Evaluator reserves the right to assess and determine the score and successful achievement of the expectations of the Workwell Audit.

This introductory section (pages 7 to 22) contains information about the Workwell process. It introduces 2 sample templates you could use to document your health and safety program that will reflect the expectations of the Workwell audit.

Templates & Guidelines are provided in the numerical order the elements are found in Workwell.

IMPORTANT: Employers need to ensure their health and safety program reflects their workplace practices and management's expectations. Therefore, each procedure provided in this Templates and Guidelines booklet must be customized to reflect their workplace in order to potentially score points for that element.

If you are unsure about how to complete an element, you are encouraged to telephone or e-mail the Evaluator for further details.

BACKGROUND

For some time, the Workplace Safety and Insurance Board of Ontario has directly linked the health and safety program and standards maintained by employers to their accident performance. In November 1989, the Board of Directors of the Workplace Safety & Insurance Board approved the Workwell Program under section 82 of the *Workplace Safety and Insurance Act (WSIA)*. This program provides financial incentives to employers to improve workplace health and safety.

The Workwell Program promotes health and safety by levying premium surcharges against employers who have not taken sufficient precautions to prevent injury and illness to workers or where the working conditions are not safe for workers. Workwell focuses its resources on employers who have demonstrated poor accident cost behaviour or frequency experience. Section 82 of the Workplace Safety and Insurance Act permits the Workplace Safety and Insurance Board to consider health and safety conditions in the workplace as factors in estimating the likely accident experience of firms. In doing so, the Board follows accepted insurance principles in which the degree of risk is reflected in the total premiums paid.

HOW THE WORKWELL PROGRAM WORKS

Identification of Employers

Every year the Workplace Safety and Insurance Board (WSIB) identifies employers whose health and safety performance is in the worst 25% range of their rate group. Others are identified based on a specific referral from various sources including: Ministry of Labour information, injury frequency information; injury cost information; degree of compliance with first aid regulations; complaints or referrals from workers or other parties; or any information that may come to the WSIB's attention concerning serious deficiencies in an employer's health and safety measures. The WSIB adopts a comparative approach to information by attempting to evaluate an employer relative to the record of other similar sized employers in the same industry.



Notification to Employers

Each June, the WSIB sends notification to employers to inform them that their business has met the Workwell selection criteria and will receive a Workwell audit. The Workwell Evaluator will contact the employer within twelve months to book the time and date of the audit. The audit may take place within 2 weeks of the Workwell Evaluators contact.

Evaluation Process

During the evaluation it is expected that the owner or senior management of the firm and a worker representative will meet with the WSIB Evaluator. The Evaluator examines the occupational health and safety program at the workplace. In addition, the Evaluator observes the firm's practices and procedures in action, tours the workplace and conducts random interviews.

Completed Report

After the visit, a report is prepared and mailed to the management representative involved with the evaluation process. In addition, copies of the report material are sent to the Ministry of Labour and to the appropriate Health and Safety Association. The report indicates the firm's overall score, identifies health and safety program components that are in place, and identifies areas needing improvement.

Re-evaluation Visit

Firms that do not achieve the passing score of 75% are given 6 months to improve their health and safety shortfalls before a re-evaluation.

Additional Premium Charge

If the firm fails to achieve the passing score of 75% at the second evaluation, a surcharge will be applied in addition to the regular annual premium. This charge will range from 10% to 75% of the firm's base annual premium, up to a maximum of \$500,000.

Workwell Program Evaluation Method

Through a series of questions, the Workwell Audit measures the company's occupational health and safety program. Each question specifies what the Evaluator will review during the process. The key areas measured are management and supervisory commitment, ownership of the program, structures, systems and processes that reflect safety culture and demonstrates involvement of workers in making the workplace safe and healthy.

Verification

Evaluators will verify the existence, consistent implementation of, and adherence to, the firm's occupational health and safety program. The verification process requirements are listed on the evaluation and include the following:



➤ *Documentation*

The Evaluator reviews and where necessary attaches copies of a firm's health and safety program documentation. The employer is required to provide documentation which may include written policies, rules, procedures, work procedures, job descriptions, inspection reports, minutes of health and safety committee meetings, and other records as requested. All components of your program require written standards and procedures for each element, which the Evaluator will review.

➤ *Interview*

The Evaluator discusses the evaluation process with representatives of management and labour. In addition, the Evaluator will tour the workplace to conduct random interviews with the firm's workers, supervisors and managers. During these interviews, the Evaluator discusses the standards and procedures found in the firm's health and safety program to verify program implementation, employee knowledge and employee understanding.

➤ *Observation*

The Evaluator will also observe procedures used by employees at work related to health and safety such as housekeeping, production process, job tasks, machine/equipment function and use of personal protective equipment or clothing.

Element Evidence:

All elements of the Workwell program must be validated. The elements must:

- a) be in writing,
- b) have standards that at a minimum meet any legislated requirements,
- c) be communicated to the appropriate workplace parties,
- d) have a record of the communication and,
- e) have evidence of implementation and regular use in the workplace.

The Evaluator may ask for a complete list of people (payroll list) and machinery (asset list) to assist in the audit.

Training

Where training is required you need to demonstrate that there is transference of knowledge. You need to have written records that show ALL workplace parties have been trained. Courses may offer certificates of completion without testing. If you do not train all workplace parties you will need to demonstrate an adequate reason why. (Example: It may not be necessary to train salespeople in confined space procedures if they never enter the work area).

General comments

Some questions may provide examples or list basic elements of a policy or procedure. These are minimums and if your workplace has specific requirements, or special legislated requirements, those requirements will also need to be met to gain the points for the question. The Evaluator or your safe workplace association can provide further insight into specific requirements for your workplace.

During the evaluation you are strongly encouraged to ask questions and take notes about your discussions with the Evaluator.

Mapping of the Workwell elements to a health and safety program

A health and safety program is a systematic approach to preventing injury and illness. The following four elements are the building blocks of a health and safety program: Leadership, Organization, Hazard Recognition and Assessment and Control Activities. For your reference, we have indicated which elements of the Workwell Audit apply to each Safety Program component.

Workwell	<u>LEADERSHIP COMPONENT</u>
1.1	
3.1	
6.1	
10.1	
11.1	
12.1	

Leadership means putting commitment for health and safety into action and proactively managing it. Leadership includes setting the tone for prevention in the company by establishing a health and safety policy and program and implementing the standards. Targets for improving health and safety are established.

Workwell	<u>ORGANIZATION COMPONENT</u>
2.1	2.2
5.1	
5.2	
6.1	
8.1	
12.1	

Organization means establishing roles and responsibilities for health and safety for all staff, including a joint health and safety committee or health and safety representative where required. Appropriate support, resources and written authority should be in place so the individuals can successfully carry out their roles. The roles should be clearly communicated and understood.

Workwell	<u>HAZARD RECOGNITION AND ASSESSMENT COMPONENT</u>	
4.1	4.2	
5.1		
5.2		
6.1		
8.1	8.2	8.3
11.1		

A health and safety program provides opportunities for staff to voice observations and concerns regarding potential hazards. Hazards are recognized by doing inspections, investigations, reviewing records, observation, trend analysis and task analysis. Once a hazard is recognized it should be assessed, using the appropriate method, to determine if there is a divergence from the standards/expectations of the company for that hazard.

Workwell	<u>CONTROL ACTIVITIES COMPONENT</u>
4.1	
4.2	
6.1	
7.1	
9.1	
10.1	
11.1	

A company health and safety program will prevent illnesses and injuries by eliminating or controlling identified hazards. Examples of control activities are emergency preparedness, personal protective equipment policies, lock-out programs, first aid and return to work programs.

Managing your Health and Safety Program

The Five Steps to Managing Health and Safety is a simple tool to help you develop a health and safety program and a process to manage it.

WHAT IS A HEALTH AND SAFETY PROGRAM?

A health and safety program is the set of standards, expressed as policies and procedures used to implement the company's health and safety policy. Every company's program is unique and should reflect the individual risks at the work-site. An effective health and safety program requires the active involvement of management as well as participation by experienced (either by training and/or working knowledge) workers in both the development and implementation of the program.

WHAT IS A HEALTH AND SAFETY POLICY?

A health and safety policy *for the company*, is a written statement of an employer's commitment to protect the health and safety of employees at work. As noted above, policies are also written as procedures to define company standards and expectations for *each element*, within each component.

THE PROCESS USING FIVE STEPS TO MANAGING HEALTH AND SAFETY

Managing health and safety is just like managing other parts of your business. To be effective, it should be part of managing your daily routine and your daily expectations. The factors that are needed for good health and safety are largely the same as those that produce business success. Successful implementation also provides a process for continuous improvement. A health and safety program is dynamic and needs to be reviewed and updated to meet changing conditions. In the following section, the Five Steps to Managing Health and Safety are explained to help you develop your program.



The 5 Steps



STEP ONE: SET STANDARDS

Standards are important because they let employees know what level of performance is expected and acceptable and they provide a benchmark to use when evaluating health and safety.

You can demonstrate management commitment by establishing standards and expectations for health and safety. You set your own standards by developing safe work procedures to reflect your management's expectations. These procedures give step-by-step instructions for particular tasks or processes and are valuable as a training tool.

The *Occupational Health and Safety Act* (OHSA) sets out minimum standards for workplaces in Ontario. Ensure that these legal requirements and any other applicable ones are included in your standards. The Canadian Standards Association, Standards Council of Canada, Canadian General Standards Boards and Ministry of Labour publish health and safety standards and guidelines.

Standards should be written in plain language (this could include various languages depending on the diversity of the employees), so that everyone can read and understand them. Consult with your employees when setting your standards as their experience and knowledge can be invaluable. If employees see that their contributions are valued, it will help provide buy-in.



Example Standards for the workplace: Inspections

- *Checklist prepared*
- *Inspection completed each month by 1 worker and 1 management representative*
- *Report submitted to JHSC monthly*
- *Action items identified and tracked*

The 5 Steps



STEP TWO: COMMUNICATE

Communicate your expectations, standards and procedures for workplace health and safety to the managers, supervisors and employees. This ensures that all appropriate people in the workplace have a clear understanding of what is expected of them and what they can expect from others for health and safety. Encourage communication among employees so everyone understands the standards and their role and responsibilities for prevention of injuries and illnesses. Keep written records of your communications to all employees.

Communication can happen through various means such as training, notices on bulletin boards, meetings, e-mail, tool box meetings, team meetings and guest speakers. It is essential that communication is two-way, that is, ensure that the message is understood. Ask the person to repeat the message in their own words. Keep written records of your communications.

Tips for Successful Communication

- Organize your message logically
- Make sure the message is in a language and at a reading level that the receiver can understand
- Use the best medium (written, spoken, visual) for your message and your audience
- Check that the message has been understood
- Insure that the policies are in the appropriate languages of the workplace either by translation of the policies or providing an interpreter.

In order for standards and procedures to work, workers need to buy-in and give support and commitment to the procedures. In order to buy-in, they must understand the procedures, how they work and their role in implementing it. This requires good communications and training.



Example Communicating Workplace Standards: Inspection

- *Post inspection schedule*
- *Post sample inspection checklist and/or completed inspection*
- *Post JHSC minutes including their action items*
- *Presentations at staff meetings*
- *Encourage workers to communicate their concerns to those doing inspection*

The 5 Steps



STEP THREE: TRAIN

Training means that the manager, supervisor and workers all receive health and safety training as appropriate for their jobs. Everyone in the workplace needs orientation training when they are first hired and thereafter, appropriate specific health and safety training and refreshers for their particular responsibilities. Training in safe work procedures needs to be ongoing.

Workplace training takes place in many different ways – planned training sessions, demonstrations or watching someone else do the task. Ensure that the training delivery is at a comprehension level and language that is understood by the audience. If applicable, include opportunities to practice and demonstrate what is learned. Deliver training as close as possible to the time that it is required. Keep written records of training delivered and attendance records to demonstrate the kind of training your staff have received.



Example Training Skills: Inspection

- *People completing inspections have been trained on how to recognize hazards, how to report them and follow-up on implementation of solutions.*

The 5 Steps



STEP FOUR: EVALUATE

Evaluation means that the actual health and safety activity that is ongoing is compared against the standards and expectations to ensure that they are being met. Identify non-compliance issues in your company. Your standards and procedures should be assessed to ensure that they still meet legal minimums and are valid for changing conditions in your workplace. You need to do this regularly (annually) or where significant change has occurred. Remember to keep written records demonstrating who evaluated what and any changes needed.

When conducting the evaluation, you should check the following:

- Has legislation changed?
- Is the policy being implemented?
- Are health and safety goals being met?
- Is communication about the standard clear and understood?
- Are employees receiving training on the standards and benefiting from it?
- Are employees meeting the standards or falling short?

Methods for conducting the evaluation can include:

- Observation -Walk around to see the process in action and determine if it is according to standard
- Interviewing people- employees and management
- Formal inspections
- Examine records such as first aid reports, injury statistics, property and maintenance records, inspection and hazard reports
- Ask employees for feedback



Example Evaluating against Standards: Inspection

- *Review inspection checklist and ensure it is up-to-date*
- *Ask third party to do an inspection and see if they identify different hazards*
- *Review action items and ensure that they are completed in a timely manner*
- *Review training records to see if re-fresher training is needed.*

The 5 Steps



STEP FIVE: ACKNOWLEDGE SUCCESS

Acknowledge and congratulate those who have contributed to achieving and maintaining company standards. Make improvements to the program when non-compliance problems are identified. Look for ways to implement continuous improvement in health and safety. You can accomplish this through performance appraisals, employee rewards, incentive programs and public recognition of individual contributions to improved performance. Finally, keep records demonstrating what successes were acknowledged and what improvements were made.



Example Acknowledging Success and Making Improvements: Inspection

- *Congratulate those completing inspections and carrying out action items*
- *Revise inspection checklist*
- *Revise inspection schedule*
- *Train more people to do inspections.*

How to write a Health & Safety Procedure for Workwell

WHAT IS A HEALTH AND SAFETY PROCEDURE?

A health and safety procedure is a written statement that tells you what has to be done, how it is done, who is responsible for doing it, when it should be done and why?

THE STEPS TO WRITING STANDARDS AND PROCEDURES

The written procedure¹ becomes the standard and expectation of performance for the company. A standard sets the minimum level of what is acceptable and expected. It is the clear and final word on a given issue. Procedures provide the step by step instructions on how to implement the standard. Employees can use it to answer questions. It must therefore spell out clearly what is expected and include all pertinent details.

STEP 1: Identify the issue, process or job task that requires a standard. Lock out, for example is a large issue and may have to be broken down into specific areas.

STEP 2: Refer to legislation, standard setting groups such as Canadian Standards Association, industry standards, Building Regulations and Fire Code Regulations for information. Cite sections of the legislation that apply to emphasize the importance of compliance with the standard.

STEP 3: Standards should be written in clear, specific, simple, every day language that is easily understood by employees. Define the terms used in the standard. The standard should be in writing and contain all the information the employee needs to perform the particular task. For each of the Workwell elements: **Samples** use one of 2 templates (see Templates 1 and 2 in the following pages), and /or **Guidelines** have been provided for your use.

STEP 4: Decide which staff is affected by the standard and state specifically the responsibilities of each person involved. Consider special procedures that may have to be addressed.

STEP 5: A good standard will satisfactorily address the: who, what, where, when, why and how questions?

STEP 6: The standard should be dated for implementation and reviewed as required or at least annually. It should be evaluated to determine if it is working and if any changes/improvements are needed. For instance if the law is updated or you purchase new equipment or change the layout of the work area, you may require modification of the standard.

STEP 7: On completion, review your health and safety program. Make the program available to all employees.

¹ Procedure is a generic term used to indicate a written instruction that contains management expectations. Some companies may call them policies, standards, work practices or other titles.

Terminology

Sample Template

these are examples of a procedure / policy that would meet the requirements of the element in the Workwell audit but still must be customized to meet the workplace needs and reflect current work practices.

Guideline

these are the requirements from the Workwell audit that require the employer to expand upon or develop their own procedure / policy / form / checklist which is specific to their workplace.



Important Reminder

Throughout the booklet this icon will provide you with information or a descriptor on additional resources for the development of the procedure.

Tips on what to include in the procedure / policy

WHY is it required -- outlines the scope and is a general statement about the standard's purpose or objective.

WHAT is to be done – identifies what procedures are to be done and what records to keep; includes special considerations and procedures beyond the normal.

WHO is to do it – identifies specific individuals and group responsibilities to be carried out in each section of the standard.

WHERE is it to be done -- outlines areas covered by the policy standard.

WHEN is it to be done – identifies when and under what circumstances the standard is expected to be carried out.

HOW is it to be done – this outlines the procedure and how often it is expected to be carried out. It should also include how often the policy is to be reviewed to ensure it is meeting expectations.

Sample Template 1

Title: [title and /or reference of the procedure]	Date of Issue: [when it was released for implementation]
Approved by: [person who is responsible for this procedure]	Review / Revise Date : [company needs to set a date or by order from an inspector]
Location: [where does this procedure apply. For example – whole company or specific location]	

PURPOSE

This section describes the purpose of the procedure.

SCOPE

This section describes who the procedure applies to and may include the job function, department, location.

STANDARDS / PROCEDURES

This section should be written in clear, plain, language that is understood by the employees. It is the step-by-step procedures that are performed in order to accomplish the standard. This should include what safety equipment must be used, what inspections or pre-use procedures need to be done, what record or checklist must be completed before, during or upon completion of the activity to record or document the safety precautions taken.

ROLES AND RESPONSIBILITIES

This section details who is involved in the procedure and their specific role.

COMMUNICATION

This section details how the procedure is communicated to those that the procedure applies to.

TRAINING / IMPLEMENTATION

This section identifies what training is needed, who receives the training, who delivers the training, how often the training is done and how the training completed is recorded.

EVALUATION

This section details when and how the procedure will be evaluated.

FORMS

This section lists any forms, checklist or support document identified in the procedure.

REFERENCE MATERIALS

This section may include any materials such as legislation, guides, manuals, and / or forms that apply to the procedure.

Sample Template 1 - blank

Title:	Date of Issue:
Approved by:	Review / Revise Date:
Location:	

PURPOSE

SCOPE

STANDARDS / PROCEDURES

ROLES AND RESPONSIBILITIES

COMMUNICATION

TRAINING / IMPLEMENTATION

EVALUATION

FORMS

REFERENCE MATERIALS

Sample Template 2

Title: [title and /or reference of the procedure]	Date of Issue: [when it was released for implementation]
Approved by: [person who is responsible for this procedure]	Review / Revise Date: [company needs to set a date or by order from an inspector]
Location: [where does this procedure apply. For example – whole company or specific location]	

Templates with the 'Guideline' header will have the following statement "The following are guidelines from the Workwell audit document" Your company must expand upon each bullet point in order to develop this health and safety procedure."

Content of this template could include:

Setting a Standard	<ul style="list-style-type: none"> ▪ Identify minimum standards and company expectations. For example see Workwell Guidelines
Communication (methods of)	<ul style="list-style-type: none"> ▪ How or when is this information disseminated ▪ Format of information (memo, poster, training, meetings)
Training	<ul style="list-style-type: none"> ▪ Who is responsible for training ▪ Who gets the training ▪ When does the training occur
Documentation	<ul style="list-style-type: none"> ▪ How is the information documented, ▪ Where is it posted or filed, ▪ How long is the record kept
Forms	<ul style="list-style-type: none"> ▪ Example of the form used ▪ Where is the original (completed) form kept ▪ Where do you get blank forms

Approval signature: [consider including signature]	
Distribution to: [who and where this procedure is to be distributed or posted]	Document to be posted: Yes or No

Notes: This section is for additional information or reference / directions.

Sample Template 2 - blank

Title:	Date of Issue:
Approved by:	Review / Revise Date:
Location:	

Approval signature:	
Distribution to:	Document to be posted: Yes or No

Notes: