Document Update Tracker — ISO 9001:2026 conversion

List your own QMS documents, one per row, and track each conversion edit. Example entries (Ref EX-01 to EX-08) — overwrite or delete.

Your document						Conversion edit					Approval, issue and communication				
Ref	Document code	Document title	Type	Owner	Clauses affected	Change type	Change description	Kit source used (code)	Current rev	New rev	Status	Date issued	Communicated to (who)	Training needed (Y/N)	Notes
EX-01	QM-01	Quality Manual	Manual	Quality Manager	4–10	Content change	Example: restructure to 2026 clause titles; add climate change decision (4.1), policy changes (5.2), separate risks and opportunities (6.1.2/6.1.3), management review inputs a–h and merged 10.1.	M0100-01; M0100-02	4	5	In review		All staff (summary briefing)	Y	Example entry
EX-02	QP-04	Risk and Opportunity Management	Procedure	Quality Manager	6.1.1–6.1.3; 9.1.3	Content change	Example: separate sections for risks and for opportunities; add analyse-and-evaluate step and disruption to supply.	P0611-01	2	3	Drafting			Y	Example entry
EX-03	QF-31	Opportunity Evaluation Form	Record template	Quality Manager	6.1.3	New document	Example: new form to evaluate and track opportunities, adapted from the kit form.	F0611-02	—	1	Not started			Y	Example entry
EX-04	QF-12	Management Review Agenda and Minutes	Form	Quality Manager	9.3.2; 9.3.3	Content change	Example: re-letter inputs a–h; add changes in interested parties' needs and expectations; separate risk and opportunity inputs; retitle outputs as results.	F0930-01; F0930-02	3	4	Approved		Top management	N	Example entry
EX-05	QF-20	Induction Checklist	Form	HR Manager	7.3	Content change	Example: add an item on the organization's quality culture and ethical behaviour.	F0723-04	2	3	Issued	15 Mar 2027	Line managers; HR	Y	Example entry
EX-06	QP-11	Continual Improvement	Procedure	Quality Manager	10.1; 10.3	Withdraw	Example: content merged into QP-10 Improvement, which now refers to 10.1; withdraw QP-11.	P1010-01	2	—	Approved		Process owners	N	Example entry
EX-07	WI-07	Machine set-up and first-off approval	Work instruction	Operations Manager	7.5; 8.5.1	Terminology only	Example: footer "retain documented information" changed to "available as evidence".	—	6	7	Not started			N	Example entry (manufacturing)
EX-08	QF-05	Customer Property Log	Record template	Operations Manager	8.5.3	No change	Example: checked against the search terms; no change needed.	—	3	3	Issued			N	Example entry

SAMPLE

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Search terms — wording to find in your existing documents

Search each document for these terms (Ctrl+F). Paraphrased from G0001-11; check the ISO 9001:2026 text before editing.

Search, then replace or check					
No.	**Search for**	**Where it is often found**	**What to replace or check**	**Clause (2026)**	**Usual change type**
S-01	“maintain documented information”; “maintained as documented information”	Procedures, the manual, form footers, document lists	Replace with wording that the documented information is available (2026 uses “shall be available as documented information”). Intent unchanged: these are controlled documents.	Throughout	Terminology only
S-02	“retain documented information”; “retained as evidence”; “records shall be retained”	Procedures, form and record footers, record retention tables	Replace with wording that the documented information is available as evidence. Keep your retention periods and record controls: the change is wording only.	Throughout	Terminology only
S-03	“this International Standard”	The manual, scope statement, procedures that quote the standard	Replace with “ISO 9001:2026” or “the standard”; the 2026 edition refers to itself as “this document”.	Throughout	Terminology only
S-04	“ISO 9001:2015”; “Amd 1:2024”; “2015”	Document headers, scope statement, policy, certificates, supplier questionnaires	Update to ISO 9001:2026 where the current requirement is meant. Leave historical records unchanged.	Throughout	Terminology only
S-05	“10.3”; “continual improvement (10.3)”	Improvement procedure, manual cross-reference tables, audit checklists	10.3 is deleted. Continual improvement is now 10.1. Redirect references to 10.1 and check the procedure covers the 10.1 actions.	10.1; 10.3	Content change
S-06	“6.1.2” used for opportunities; “risks and opportunities (6.1.2)”	Risk procedure, risk register, objectives and management review documents	Risks stay under 6.1.2; opportunities move to the new 6.1.3. Check opportunities have their own determination, evaluation, actions and effectiveness review.	6.1.2; 6.1.3	Content change
S-07	“risk-based thinking” used on its own	Manual leadership section, policy, training material, role descriptions	Check: top management now promote risk-based thinking and opportunity-based thinking (5.1.1). Add opportunity-based thinking where leadership commitments are described.	5.1.1	Content change
S-08	Management review inputs lettered (a)–(f); “9.3.2 (e) risks and opportunities”	Management review procedure, agenda, minutes and presentation templates	Re-letter to (a)–(h) in the 2026 order: add (c) changes in interested parties’ needs and expectations; opportunities for improvement (e) before adequacy of resources (f); separate (g) risks and (h) opportunities.	9.3.2	Content change
S-09	“effectiveness of actions taken to address risks and opportunities” (analysis and evaluation)	Analysis and evaluation procedure, KPI reports	Check: 9.1.3 now evaluates risk actions and opportunity actions as two separate items.	9.1.3	Content change
S-10	“outsourced process(es)”	Operational planning, purchasing and supplier procedures	Check: 8.1 now uses externally provided processes, products or services that are relevant to the QMS, as in 8.4.	8.1	Terminology only
S-11	“Measurement traceability”	Calibration procedure, equipment records	Retitle to “Traceability of measurement results”; status labels refer to calibration or verification status.	7.1.5.2	Terminology only
S-12	“Management review outputs”	Management review procedure and minutes	Retitle to “Management review results”.	9.3.3	Terminology only
S-13	“customers’ perceptions”	Customer satisfaction procedure, survey templates	Check: 9.1.2 now requires monitoring of customer satisfaction and methods for obtaining, monitoring and reviewing that information.	9.1.2	Content change
S-14	“relevant persons are made aware” (changed requirements)	Order and contract review procedure	Check: changed requirements are now communicated to the relevant interested parties, not only to relevant persons.	8.2.4	Content change
S-15	“identify, review and control changes” (design)	Design and development procedure	Change “identify” to “determine”.	8.3.6	Terminology only
S-16	“Annex B”; references to ISO 9000 for all terms	Manual glossary, references section	Annex B is removed. Clause 3 now holds core terms; ISO 9000 remains a normative reference.	3	Terminology only

S-01 to S-08 are the main wording changes. S-09 to S-16 are further terms worth checking. Record each document you edit on the Document Tracker.

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