SKEDMIA

ISO 29993:2017

Learning services outside formal education — Service requirements

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Document Master List

Controlled list of every document supplied in the ISO 29993:2017 kit, with its revision status and owner.

Document control

Document number	GDE-02	**Revision**	0
Document title	Document Master List	**Issue date**	[Date]
Document owner	Management Representative	**Next review**	[Date]
Management system	Learning Services Management System	**Classification**	Internal
Standard clauses	7.5	**Status**	For approval

	Name	Position	Signature / Date
Prepared by	[Name]	[Position]	
Reviewed by	[Name]	[Position]	
Approved by	[Name]	[Position]	

Rev.	Date	Description of change	Author
0	[Date]	First issue.	[Name]

Before you issue this document

Replace every highlighted placeholder such as [Organisation Name] with your own details, delete any clause that does not apply to your scope, and have the document approved by the roles named above. Record the approval in the revision history — an auditor will ask who approved it and when.

This master list records every document in the ISO 29993:2017 Complete Documentation Kit. It is the register required by the standard's documented-information clause: when [Organisation Name] adopts the kit, update the revision and issue-date columns as each document is approved, and add any document created locally.

How to use this list

Keep one controlled copy. Every time a document is revised, raise its revision number here and on the document's own cover page. An auditor will normally ask for this list first and sample from it.

Doc. No	Document title	Clause(s)	Owner
00 Read Me First			
GDE-01	Kit Guide and Implementation Roadmap	7, 11, 10, 13	Learning Services Manager
01 Manual			
MAN-01	Learning Services Management System Manual	1, 4, 8, 10.1, 11, 10, 13	Learning Services Manager
MAN-02	Scope and Boundaries of the Learning Services Management System	1, 4	Learning Services Manager
MAN-03	ISO 29993 Structure, Terminology and Conformity Route Statement	1, 2, 3	Learning Services Manager
02 Policies			
POL-01	Fees, Payment Terms, Cancellation, Withdrawal and Refund Policy	6, 14	Finance Manager
POL-02	Learner Information Consent, Confidentiality and Records Retention Policy	7, 12	Learning Services Manager
03 Procedures			
PRO-01	Information Disclosure Duties Procedure	4, 6, 9	Learning Services Manager
PRO-02	Learner and Sponsor Complaints, Appeals and Suggestions Procedure	6, 13	Learning Services Manager
PRO-03	Needs Analysis Procedure	7	Learning Services Manager
PRO-04	Learning Service Design Procedure	8	Curriculum Owner
PRO-05	Competence, Training and Awareness	10.1, 11	HR Manager
PRO-06	Operational Planning and Control	10	Head of Learning Delivery
PRO-07	Learning Environment, Safety and Emergency Procedure	10.3	Head of Learning Delivery
PRO-08	Internal Audit	13	Lead Internal Auditor
04 Forms, Registers & Templates			

Doc. No	Document title	Clause(s)	Owner
FRM-01	Learning Service Roles and Responsibilities Matrix	4, 8, 13	Learning Services Manager
FRM-02	Published Provider Information Pack	4	Learning Services Manager
FRM-03	Learning Request Intake, Proposal and Capability Evidence Pack	5	Learning Services Manager
FRM-04	Pre-Purchase Information Sheet and Course Page Standard	6	Learning Services Manager
FRM-05	Needs Analysis Questionnaire and Learner Profile Record	7	Learning Services Manager
FRM-06	Intended Learning Outcomes Specification	7, 8, 12, 13	Curriculum Owner
FRM-07	Curriculum and Design Specification	8	Curriculum Owner
FRM-08	Enrolled Learner and Sponsor Information Pack	9, 10.2	Head of Learning Delivery
FRM-09	Assessment Design Specification	12	Assessment Lead
FRM-10	Assessment Records, Results Reporting and Certificate Template	12	Assessment Lead
FRM-11	Teaching and Learning Observation Form	13, 10.1	Head of Learning Delivery
FRM-12	Learning Service Evaluation Report	13	Learning Services Manager
FRM-13	Invoice and Receipt Template	14	Finance Manager
FRM-14	Competence Matrix and Training Record	10.1	HR Manager
FRM-15	Internal Audit Plan and Report	13	Lead Internal Auditor
04 Forms, Registers & Templates			
REG-01	Learning Materials Standard, Source Citation and Review Register	8, 10.2	Curriculum Owner
REG-02	Facilitator File: Qualification, Subject Competence, Briefing and Development Record	7, 10.1, 11	HR Manager
REG-03	Improvement Action Log	13	Learning Services Manager
05 Plans & Programmes			
PLN-01	Learning Service Monitoring and Evaluation Plan	13	Learning Services Manager
PLN-02	Annual Internal Audit Programme	13	Lead Internal Auditor
PLN-03	Competence and Training Plan	10.1, 11	HR Manager
06 Checklists			

Doc. No	Document title	Clause(s)	Owner
CHK-01	ISO 29993:2017 Gap Analysis Checklist	—	Learning Services Manager
CHK-02	Internal Audit Checklist	13	Lead Internal Auditor
07 Internal Auditor Training Pack			
TRN-01	Internal Auditor Participant Handbook	13	Learning Services Manager
TRN-02	Trainer's Guide	13	Learning Services Manager
TRN-03	Presentation Slides Outline	13	Learning Services Manager
TRN-04	Exercises and Case Studies	13	Learning Services Manager
TRN-05	Examination	13	Learning Services Manager
TRN-06	Examination Answer Key and Marking Scheme	13	Learning Services Manager
TRN-07	Course Forms	13	Learning Services Manager
TRN-08	Certificate of Training Template	13	Learning Services Manager

Revision status

Record the approved revision of each document as it is issued. Rows are pre-filled at revision 0 (first issue).

Doc. No	Rev.	Issue date	Approved by	Next review
GDE-01	0	[Date]	[Name]	[Date]
MAN-01	0	[Date]	[Name]	[Date]
MAN-02	0	[Date]	[Name]	[Date]
MAN-03	0	[Date]	[Name]	[Date]
FRM-01	0	[Date]	[Name]	[Date]
FRM-02	0	[Date]	[Name]	[Date]
PRO-01	0	[Date]	[Name]	[Date]
FRM-03	0	[Date]	[Name]	[Date]
FRM-04	0	[Date]	[Name]	[Date]
POL-01	0	[Date]	[Name]	[Date]
PRO-02	0	[Date]	[Name]	[Date]
PRO-03	0	[Date]	[Name]	[Date]

Doc. No	Rev.	Issue date	Approved by	Next review
FRM-05	0	[Date]	[Name]	[Date]
FRM-06	0	[Date]	[Name]	[Date]
POL-02	0	[Date]	[Name]	[Date]
PRO-04	0	[Date]	[Name]	[Date]
FRM-07	0	[Date]	[Name]	[Date]
REG-01	0	[Date]	[Name]	[Date]
FRM-08	0	[Date]	[Name]	[Date]
PRO-05	0	[Date]	[Name]	[Date]
REG-02	0	[Date]	[Name]	[Date]
PRO-06	0	[Date]	[Name]	[Date]
PRO-07	0	[Date]	[Name]	[Date]
FRM-09	0	[Date]	[Name]	[Date]
FRM-10	0	[Date]	[Name]	[Date]
PRO-08	0	[Date]	[Name]	[Date]
PLN-01	0	[Date]	[Name]	[Date]
FRM-11	0	[Date]	[Name]	[Date]
FRM-12	0	[Date]	[Name]	[Date]
REG-03	0	[Date]	[Name]	[Date]
FRM-13	0	[Date]	[Name]	[Date]
FRM-14	0	[Date]	[Name]	[Date]
FRM-15	0	[Date]	[Name]	[Date]
PLN-02	0	[Date]	[Name]	[Date]
PLN-03	0	[Date]	[Name]	[Date]
CHK-01	0	[Date]	[Name]	[Date]
CHK-02	0	[Date]	[Name]	[Date]
TRN-01	0	[Date]	[Name]	[Date]
TRN-02	0	[Date]	[Name]	[Date]
TRN-03	0	[Date]	[Name]	[Date]
TRN-04	0	[Date]	[Name]	[Date]
TRN-05	0	[Date]	[Name]	[Date]
TRN-06	0	[Date]	[Name]	[Date]
TRN-07	0	[Date]	[Name]	[Date]
TRN-08	0	[Date]	[Name]	[Date]

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Clause Cross-Reference Matrix

Shows which kit document answers each clause of ISO 29993:2017 — the table certification bodies ask for at stage 1.

Document control

Document number	GDE-03	**Revision**	0
Document title	Clause Cross-Reference Matrix	**Issue date**	[Date]
Document owner	Management Representative	**Next review**	[Date]
Management system	Learning Services Management System	**Classification**	Internal
Standard clauses	—	**Status**	For approval

	Name	Position	Signature / Date
Prepared by	[Name]	[Position]	
Reviewed by	[Name]	[Position]	
Approved by	[Name]	[Position]	

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Use this matrix to demonstrate that every requirement of ISO 29993:2017 is addressed by documented information. Complete the final column with the evidence or record that proves the requirement is being met in practice, and take it to the stage 1 audit.

Good practice

Auditors use a matrix like this to plan their sample. A complete, honest matrix shortens stage 1 considerably; an aspirational one invites a deeper audit.

Clause	Kit document(s)	Evidence / records in use
1	MAN-01, MAN-02, MAN-03	
2	MAN-03	
3	MAN-03	
4	FRM-01, FRM-02, MAN-01, MAN-02, PRO-01	
5	FRM-03	
6	FRM-04, POL-01, PRO-01, PRO-02	
7	FRM-05, FRM-06, GDE-01, POL-02, PRO-03, REG-02	
8	FRM-01, FRM-06, FRM-07, MAN-01, PRO-04, REG-01	
9	FRM-08, PRO-01	
10	GDE-01, MAN-01, PRO-06	
10.1	FRM-11, FRM-14, MAN-01, PLN-03, PRO-05, REG-02	
10.2	FRM-08, REG-01	
10.3	PRO-07	
11	GDE-01, MAN-01, PLN-03, PRO-05, REG-02	
12	FRM-06, FRM-09, FRM-10, POL-02	
13	CHK-02, FRM-01, FRM-06, FRM-11, FRM-12, FRM-15, GDE-01, MAN-01, PLN-01, PLN-02, PRO-02, PRO-08, REG-03, TRN-01, TRN-02, TRN-03, TRN-04, TRN-05, TRN-06, TRN-07, TRN-08	
14	FRM-13, POL-01	

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