SKEDMIA

ISO 50001:2018

Energy management systems — Requirements with guidance for use

GUIDE

Document Master List

Controlled list of every document supplied in the ISO 50001:2018 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	Energy 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 50001:2018 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	4, 5, 6, 7, 8, 9, 10	Energy Manager
01 Manual			
MAN-01	Energy Management System Manual	4, 4.1, 4.2, 4.3, 4.4, 5, 5.1, 5.2, 5.3, 6, 6.1, 6.2, 6.3, 6.4, 6.5, 6.6, 7, 7.1, 7.2, 7.3, 7.4, 7.5, 8, 8.1, 8.2, 8.3, 9, 9.1, 9.2, 9.3, 10, 10.1, 10.2	Energy Manager
MAN-02	Scope and Boundaries of the Energy Management System	4.3, 4.4	Energy Manager
02 Policies			
POL-01	Energy Policy	5.2	Top Management
POL-02	Energy Procurement and Purchasing Policy	8.3	Procurement Manager
POL-03	Energy-Efficient Design Policy	8.2	Site Engineer
POL-04	Competence, Training and Awareness Policy	7.2, 7.3	HR Manager
POL-05	Energy Data, Metering and Information Management Policy	6.6, 7.5, 9.1	Energy Manager
POL-06	Management of Change Policy	8.1, 6.3	Energy Manager
POL-07	Communication and Engagement Policy	7.4	Energy Manager
03 Procedures			
PRO-01	Context of the Organisation and Interested Parties	4.1, 4.2	Energy Manager
PRO-02	Risks and Opportunities	6.1	Energy Manager
PRO-03	Energy Review	6.3	Energy Manager
PRO-04	Significant Energy Uses — Determination, Control and Review	6.3, 8.1	Energy Manager
PRO-05	Energy Performance Indicators	6.4	Energy Manager
PRO-06	Energy Baselines and Normalisation	6.5, 6.4	Energy Manager
PRO-07	Objectives, Energy Targets and Action Plans	6.2	Energy Manager

Doc. No	Document title	Clause(s)	Owner
PRO-08	Energy Data Collection and Metering	6.6, 9.1.1	Energy Manager
PRO-09	Competence, Training and Awareness	7.2, 7.3	HR Manager
PRO-10	Communication	7.4	Energy Manager
PRO-11	Control of Documented Information	7.5, 7.5.1, 7.5.2, 7.5.3	Energy Manager
PRO-12	Operational Planning, Control and Management of Change	8.1	Maintenance Manager
PRO-13	Energy Considerations in Design	8.2	Site Engineer
PRO-14	Procurement of Energy Services, Products, Equipment and Energy	8.3	Procurement Manager
PRO-15	Monitoring, Measurement, Analysis and Evaluation of Energy Performance	9.1, 9.1.1	Energy Manager
PRO-16	Evaluation of Compliance with Legal and Other Requirements	9.1.2, 4.2	Energy Manager
PRO-17	Internal Audit	9.2, 9.2.1, 9.2.2	Lead Internal Auditor
PRO-18	Management Review	9.3, 9.3.1, 9.3.2, 9.3.3	Top Management
PRO-19	Nonconformity, Corrective Action and Continual Improvement	10.1, 10.2	Energy Manager
04 Forms, Registers & Templates			
FRM-01	Context, Issues and Climate Relevance Analysis	4.1	Energy Manager
FRM-02	Energy Team Appointment, Roles and Authorities	5.3, 5.1	Top Management
FRM-03	Energy Review Report	6.3	Energy Manager
FRM-04	Energy Balance and Consumption Profile Worksheet	6.3	Energy Manager
FRM-05	Competence Matrix and Training Record	7.2	HR Manager
FRM-06	Communication Log and Energy Suggestion Form	7.4	Energy Manager
FRM-07	SEU Operating Criteria and Setpoint Sheet	8.1	Maintenance Manager
FRM-08	Management of Change Request — Energy Screening	8.1, 6.3	Energy Manager
FRM-09	Design Energy Review Record	8.2	Site Engineer
FRM-10	Energy Purchasing Specification and Supplier Notification	8.3	Procurement Manager
FRM-11	Energy Performance Monthly Report	9.1.1	Energy Manager
FRM-12	Significant Deviation Investigation Record	9.1.1	Energy Manager
FRM-13	Compliance Evaluation Record	9.1.2	Energy Manager
FRM-14	Internal Audit Plan and Report	9.2	Lead Internal Auditor
FRM-15	Management Review Minutes and Actions	9.3	Top Management

Doc. No	Document title	Clause(s)	Owner
FRM-16	Measurement and Verification (M&V) Record	6.2, 9.1.1	Energy Manager
FRM-17	Document Change Request	7.5.2, 7.5.3	Energy Manager
04 Forms, Registers & Templates			
REG-01	Interested Parties and Requirements Register	4.2	Energy Manager
REG-02	Legal and Other Requirements Register	4.2, 9.1.2	Energy Manager
REG-03	Risk and Opportunity Register	6.1	Energy Manager
REG-04	Significant Energy Use (SEU) Register	6.3, 8.1	Energy Manager
REG-05	Relevant Variables, Static Factors and Energy Baseline Record	6.5, 6.3	Energy Manager
REG-06	Energy Opportunities Register	6.3, 6.2	Energy Manager
REG-07	EnPI Register and Value Record	6.4	Energy Manager
REG-08	Objectives, Targets and Action Plan Tracker	6.2	Energy Manager
REG-09	Metering and Instrument Register	6.6	Maintenance Manager
REG-10	Outsourced Process and Contractor Energy Control Register	8.1	Procurement Manager
REG-11	Nonconformity and Corrective Action Register	10.1	Energy Manager
05 Plans & Programmes			
PLN-01	EnMS Implementation Plan	4, 5, 6, 7, 8, 9, 10	Energy Manager
PLN-02	Energy Data Collection Plan	6.6	Energy Manager
PLN-03	Annual Internal Audit Programme	9.2.1	Lead Internal Auditor
PLN-04	Competence and Training Plan	7.2, 7.3	HR Manager
PLN-05	Communication Plan	7.4	Energy Manager
06 Checklists			
CHK-01	ISO 50001:2018 Gap Analysis Checklist	6.3	Energy Manager
CHK-02	Internal Audit Checklist — Clauses 4 to 10	9.2	Lead Internal Auditor
CHK-03	Certification Readiness Checklist	6.3	Energy Manager
CHK-04	Energy Review Data Collection Checklist	6.3	Energy Manager
CHK-05	Energy Survey and Walk-Round Checklist	6.3	Maintenance Manager
07 Internal Auditor Training Pack			
TRN-01	Internal Auditor Participant Handbook	9.2	Energy Manager

Doc. No	Document title	Clause(s)	Owner
TRN-02	Trainer's Guide	9.2	Energy Manager
TRN-03	Presentation Slides Outline	9.2	Energy Manager
TRN-04	Exercises and Case Studies	9.2	Energy Manager
TRN-05	Examination	9.2	Energy Manager
TRN-06	Examination Answer Key and Marking Scheme	9.2	Energy Manager
TRN-07	Course Forms	7.2, 9.2	Energy Manager
TRN-08	Certificate of Training Template	7.2	Energy 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]
POL-01	0	[Date]	[Name]	[Date]
POL-02	0	[Date]	[Name]	[Date]
POL-03	0	[Date]	[Name]	[Date]
POL-04	0	[Date]	[Name]	[Date]
POL-05	0	[Date]	[Name]	[Date]
POL-06	0	[Date]	[Name]	[Date]
POL-07	0	[Date]	[Name]	[Date]
PRO-01	0	[Date]	[Name]	[Date]
PRO-02	0	[Date]	[Name]	[Date]
PRO-03	0	[Date]	[Name]	[Date]
PRO-04	0	[Date]	[Name]	[Date]
PRO-05	0	[Date]	[Name]	[Date]
PRO-06	0	[Date]	[Name]	[Date]
PRO-07	0	[Date]	[Name]	[Date]
PRO-08	0	[Date]	[Name]	[Date]
PRO-09	0	[Date]	[Name]	[Date]
PRO-10	0	[Date]	[Name]	[Date]
PRO-11	0	[Date]	[Name]	[Date]
PRO-12	0	[Date]	[Name]	[Date]
PRO-13	0	[Date]	[Name]	[Date]

Doc. No	Rev.	Issue date	Approved by	Next review
PRO-14	0	[Date]	[Name]	[Date]
PRO-15	0	[Date]	[Name]	[Date]
PRO-16	0	[Date]	[Name]	[Date]
PRO-17	0	[Date]	[Name]	[Date]
PRO-18	0	[Date]	[Name]	[Date]
PRO-19	0	[Date]	[Name]	[Date]
FRM-01	0	[Date]	[Name]	[Date]
REG-01	0	[Date]	[Name]	[Date]
REG-02	0	[Date]	[Name]	[Date]
FRM-02	0	[Date]	[Name]	[Date]
REG-03	0	[Date]	[Name]	[Date]
FRM-03	0	[Date]	[Name]	[Date]
FRM-04	0	[Date]	[Name]	[Date]
REG-04	0	[Date]	[Name]	[Date]
REG-05	0	[Date]	[Name]	[Date]
REG-06	0	[Date]	[Name]	[Date]
REG-07	0	[Date]	[Name]	[Date]
REG-08	0	[Date]	[Name]	[Date]
PLN-02	0	[Date]	[Name]	[Date]
REG-09	0	[Date]	[Name]	[Date]
FRM-05	0	[Date]	[Name]	[Date]
FRM-06	0	[Date]	[Name]	[Date]
FRM-07	0	[Date]	[Name]	[Date]
FRM-08	0	[Date]	[Name]	[Date]
REG-10	0	[Date]	[Name]	[Date]
FRM-09	0	[Date]	[Name]	[Date]
FRM-10	0	[Date]	[Name]	[Date]
FRM-11	0	[Date]	[Name]	[Date]
FRM-12	0	[Date]	[Name]	[Date]
FRM-13	0	[Date]	[Name]	[Date]
FRM-14	0	[Date]	[Name]	[Date]
FRM-15	0	[Date]	[Name]	[Date]
REG-11	0	[Date]	[Name]	[Date]
FRM-16	0	[Date]	[Name]	[Date]
FRM-17	0	[Date]	[Name]	[Date]

Doc. No	Rev.	Issue date	Approved by	Next review
PLN-01	0	[Date]	[Name]	[Date]
PLN-03	0	[Date]	[Name]	[Date]
PLN-04	0	[Date]	[Name]	[Date]
PLN-05	0	[Date]	[Name]	[Date]
CHK-01	0	[Date]	[Name]	[Date]
CHK-02	0	[Date]	[Name]	[Date]
CHK-03	0	[Date]	[Name]	[Date]
CHK-04	0	[Date]	[Name]	[Date]
CHK-05	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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ISO 50001:2018

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Clause Cross-Reference Matrix

Shows which kit document answers each clause of ISO 50001:2018 — 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	Energy 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]	

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

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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.

Use this matrix to demonstrate that every requirement of ISO 50001:2018 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
4	GDE-01, MAN-01, PLN-01	
4.1	FRM-01, MAN-01, PRO-01	
4.2	MAN-01, PRO-01, PRO-16, REG-01, REG-02	
4.3	MAN-01, MAN-02	
4.4	MAN-01, MAN-02	
5	GDE-01, MAN-01, PLN-01	
5.1	FRM-02, MAN-01	
5.2	MAN-01, POL-01	
5.3	FRM-02, MAN-01	
6	GDE-01, MAN-01, PLN-01	
6.1	MAN-01, PRO-02, REG-03	
6.2	FRM-16, MAN-01, PRO-07, REG-06, REG-08	
6.3	CHK-01, CHK-03, CHK-04, CHK-05, FRM-03, FRM-04, FRM-08, MAN-01, POL-06, PRO-03, PRO-04, REG-04, REG-05, REG-06	
6.4	MAN-01, PRO-05, PRO-06, REG-07	
6.5	MAN-01, PRO-06, REG-05	
6.6	MAN-01, PLN-02, POL-05, PRO-08, REG-09	
7	GDE-01, MAN-01, PLN-01	
7.1	MAN-01	
7.2	FRM-05, MAN-01, PLN-04, POL-04, PRO-09, TRN-07, TRN-08	
7.3	MAN-01, PLN-04, POL-04, PRO-09	
7.4	FRM-06, MAN-01, PLN-05, POL-07, PRO-10	
7.5	MAN-01, POL-05, PRO-11	
7.5.1	PRO-11	
7.5.2	FRM-17, PRO-11	
7.5.3	FRM-17, PRO-11	
8	GDE-01, MAN-01, PLN-01	

Clause	Kit document(s)	Evidence / records in use
8.1	FRM-07, FRM-08, MAN-01, POL-06, PRO-04, PRO-12, REG-04, REG-10	
8.2	FRM-09, MAN-01, POL-03, PRO-13	
8.3	FRM-10, MAN-01, POL-02, PRO-14	
9	GDE-01, MAN-01, PLN-01	
9.1	MAN-01, POL-05, PRO-15	
9.1.1	FRM-11, FRM-12, FRM-16, PRO-08, PRO-15	
9.1.2	FRM-13, PRO-16, REG-02	
9.2	CHK-02, FRM-14, MAN-01, PRO-17, TRN-01, TRN-02, TRN-03, TRN-04, TRN-05, TRN-06, TRN-07	
9.2.1	PLN-03, PRO-17	
9.2.2	PRO-17	
9.3	FRM-15, MAN-01, PRO-18	
9.3.1	PRO-18	
9.3.2	PRO-18	
9.3.3	PRO-18	
10	GDE-01, MAN-01, PLN-01	
10.1	MAN-01, PRO-19, REG-11	
10.2	MAN-01, PRO-19	