WHO	KEY STEPS	CLARIFICATION
	1. GENERAL	
a) **Chairman** **Document Controller** **System Administrator**	**SCOPE: This Work Instruction Covers…**	1) This Method Statement is a document detailing "How To" complete the task of managing internal and external documents to ensure authorised users have ready access to pertinent and current documents to assist PNSG to meet its goals and objectives 2) Sections: 1. General 2. Internal Documents 3. External Documents 4. Internal Document Processing 5. External Document Processing 6. Suggestions and Improvements
b) **Chairman** **Document Controller** **System Administrator**	**Definitions**	1) **Internal Document**: Any document developed by PNSG e.g., a procedure, form, etc. 2) **External Document**: Any document utilised by PNSG but developed and revised by any organisation except PNSG e.g., Acts, Regulations etc produced and edited by government 3) **Risk** (legal repercussions, organisational loss): The possible penalties that can be applied to the company as a result of an actual or potential undesirable event that the company is held accountable by our legal system or may negatively affect our charity. Risks are assessed by using the ***Risk Table*** and recorded in our ***SMA Database***
c) **Chairman** **Document Controller** **System Administrator**	**Policy**	1) This Method Statement assists PNSG to meet its stated policies, refer SMA → Results → Policies 2) Frequency for reviewing and possibly revising, superseding etc internal documents and checking currency of external documents refer ***P-01 Systems Management***

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d) **Chairman** **Document Controller** **System Administrator**	**SMA Database (Systems Manager's Assistant)**	1) **SMA (Systems Manager's Assistant):** Is a database PNSG has adopted and is central to the management system. ***SMA*** is intended to help us to: a) Meet our responsibilities and maximise the effectiveness of the risk-based management system in all areas (ACNC, Quality, OH&S and Environmental) b) Understand how the management system fits together and to get the most from the management system c) Provide centralised and easy access to the management system documents utilising PNSG's approved computer d) Maintain an acceptable level of document control by maintaining a single current and controlled version of each document on PNSG's approved computer e) Reduce the amount of paper used to minimise PGSN's footprint upon our environment 2) Pressing F1 (with keyboard Function Lock on) provides ***SMA*** users with help relevant to the screen currently displayed or full help displayed as chapters
		2. INTERNAL DOCUMENTS
a) **System Administrator** **Document Controller** **Chairman**	**Internal Document Types**	1) Refer SMA →Setup → Documents 2) Internal Document are controlled under tabs (in order from left to right): a) Procedures – Procedures, forms, related documents e.g., ***MSS 01 Management System Structure*** b) Method Statements /JSA c) Job Descriptions d) Project Documents –Contract specific documents e) Other Documents - Miscellaneous f) Photographs – Digital pictures taken by PNSG usually to substantiate /reinforce a point e.g., pictures taken immediately after an incident has occurred **N.B.** Subject to certifying standards and /or PNSG preference not all internal documents need to be controlled 3) Refer section "Internal and External Document Processing" below
		3. EXTERNAL DOCUMENTS
a) **System Administrator** **Document Controller** **Chairman**	**External Document Types**	1) Refer SMA →Setup → Documents 2) External Document are controlled under tabs (in order from left to right): a) Legal – Government b) Standards – Australian and international standards e.g., ISO9001 Quality Management c) (M)SDS – (Material) Safety Data Sheets 3) Refer section Internal and External Document Processing below

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b) **System Administrator** **Document Controller** **Chairman**	**Legal Documents Notification, Review and Approval**	1) Utilise relevant web sites and /or subscribe to (but not limited to): a) State Law Publisher b) WorkSafe WA (and other states as required) c) SafeWork Australia (National) d) SAI Global e) Other 2) Review and approve relevant legal documents (refer below) 3) Maintain ***Document Control Register*** (within ***SMA***) to ensure external documents are reviewed (refer ***P-01 Systems Management*** for frequency of checking currency of documents)
	4. INTERNAL AND EXTERNAL DOCUMENT PROCESSING	
a) **System Administrator** **Chairman** **Document Controller**	**Setting Up Internal Documents**	1) Recording revision status of pertinent internal documents, covering but not limited to: a) Management System documents b) Member provided documents c) Member digital photographs 2) Internal management system documents may not always be contained within SMA: a) Develop documents using MSWord or text document within SMA b) Securely store editable MSWord documents and SMA text documents on the PNSG approved laptop c) Share approved internal documents only in PDF on PNSG Website i) Policies and other text reports generated in SMA: (1) Within SMA print all policies with cover sheet to one pdf document and save to C:\PNSG SMA\PNSG Backend\Documents\01 Systems Management (2) Name the saved policies pdf Policies yyyy.mm.dd (enter date saved this format) (3) Open cPanel pnsgorga with password and navigate to WordPress and login to PNSG website (edit side) (4) Import the new pdf into Documents and allocate to Document Categories to display in correct group when PNSG Library page is opened ii) Procedures, forms and other documents generated in MSWord: (1) When ready to upload a management system document generated within MSWord, Excel etc. to PNSG website save to pdf using Ctrl-P and *not* File → Save As in MSWord /Excel etc. (2) Save pdf to C:\PNSG SMA\PNSG Backend\Documents\01 (3) Open cPanel pnsgorga with password and navigate to WordPress and login to PNSG website (edit side) (4)

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b) **System Administrator** **Chairman** **Document Controller**	**Setting Up Internal Documents on PNSG Website**	1) Setting up and revising MS-01 Management System Structure as contents document to access system documents by hyperlink 2) From PNSG approved laptop open MSS-01 Management System Structure in C:\PNSG SMA\PNSG Backend\Documents\01 Systems Management 3) Review and/or revise or if adding or changing a hyperlink, within MSS-01 Management System Structure SaveAs then: a) Make the desired changes including hyperlinks b) Any text to become a hyperlink then emboldened and italicise. Do not create a hyperlink at this stage c) Save changes d) Log in to WordPress → Documents And delete any versions of MSS-01 Management System Structure SaveAs e) Determine if a current and approved version of the document you wish to hyperlink to is displayed in WordPress documents. If a version is showing but is not current and approved, then delete it. Select and open the appropriate master document to be linked to on the approved laptop. f) Review and revise the approve document as necessary and save to a pdf using Ctrl-P (not within MSWord → File → Save As) g) Import the document to be hyperlinked to WordPress documents h) Copy the url that WordPress generates to the clipboard i) Return to the approved laptop and open the newly reviewed /revised MSS-01 find the document the appropriate document j) Highlight the appropriate document title in MSS-01 and press Ctrl-K to open the Hyperlink dialogue box and copy the url from the clipboard to the "Address" box and save 4)

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c) **System Administrator** **Chairman** **Document Controller**	**Setting Up External Documents**	5) Recording revision status of pertinent documents, covering (but not limited to): a) ACNC Act and Regulations b) Occupational Safety, Health and Wellness c) Environmental d) Privacy Act e) Workplace harassment, victimisation and bullying f) Anti-discrimination, including equal opportunity, racial vilification, disability discrimination g) Other relevant Acts, Regulations, Australian Standards, Codes of Practice, Guidelines h) Grant specific documents i) External digital photographs 6) Internal management system documents may not always be contained within SMA: a) Develop documents using MSWord or text document within SMA b) Securely store editable MSWord documents and SMA text documents on the PNSG approved laptop c) Share approved internal documents only in PDF on PNSG Website i) Policies and other text reports generated in SMA: (1) Within SMA print all policies with cover sheet to one pdf document and save to C:\PNSG SMA\PNSG Backend\Documents\01 Systems Management (2) Name the saved policies pdf Policies yyyy.mm.dd (enter date saved this format) (3) Open cPanel pnsgorga with password and navigate to WordPress and login to PNSG website (edit side) (4) Import the new pdf into Documents and allocate to Document Categories to display in correct group when PNSG Library page is opened ii) Procedures, forms and other documents generated in MSWord: (1) When ready to upload a management system document generated within MSWord, Excel etc. to PNSG website save to pdf using Ctrl-P and *not* File → Save As in MSWord /Excel etc. (2) Save pdf to C:\PNSG SMA\PNSG Backend\Documents\01 (3) Open cPanel pnsgorga with password and navigate to WordPress and login to PNSG website (edit side) (4) 7) Allocate person to check currency of external documents. **Administrator** to log into SMA → Setup → Popup Setup → Document Reminders 8) Record, link, control and list recipients for each relevant external document in SMA Database → Setup → Documents, refer SMA Help (F1). When looking for future updates having a Net address of each external document previously saved to "Web Address" in SMA Documents can save a lot of time searching for an appropriate website

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d) **System Administrator** **Chairman** **Document Controller**	**Making Changes and Superseding Internal Documents**	1) Understand and follow PNSG's folder **mirrored** structure for management system documents, refer c:\ using Windows Explorer, especially: a) C:\PNSG SMA\PNSG Backend\Documents \zMaster (Editable) Documents b) C:\PNSG SMA\PNSG Backend\Documents for PDF version used by SMA **N.B.** Both a) and b) paths are identical, including all sub-folders 2) Receive handwritten changes on a current version of the document to be changed; ensure understanding, clarify with the ***System Administrator*** if necessary 3) Using Windows Explorer navigate to: a) C:\PNSG SMA\PNSG Backend\Documents\zMaster b) Highlight the document to be changed c) Copy and Paste file (Ctrl C then Ctrl V), details of the copied file is displayed d) Open current version of document in C:\PNSG SMA\PNSG Backend\Documents\zMaster, **not** the copy 4) Make changes to the master document and check changes are correct 5) Update details in header: a) Date: Change to the date the changes were made b) Section(s): Remove /overwrite details currently in the sections box and add the number of each section that were changed 6) Save document (File → Save or Ctrl S), automatically saves to the correct name and location and overwrites the previous Master version 7) Save again but this time: a) File → Save As b) In the drop-down box on the right select **PDF** c) Navigate to C:\PNSG SMA\PNSG Backend\Documents\01-13 {select correct folder and sub folder as appropriate to mirror the Master version location} 8) Using Windows Explorer then navigate to the previously copied version of the unchanged Master document and add date superseded to document filename using date format yyyy-mm-dd placing date just before e.g., ".doc(x)" 9) Drag the Master file with the superseded date to C:\PNSG SMA\PNSG Backend\Documents \Superseded Documents

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e) **System Administrator** **Chairman** **Document Controller**	**Checking Currency of External Documents in SMA**	1) ***SMA*** Pop ups advise allocated person responsible when to check document currency 2) Check currency of external documents at least annually (12 monthly) with appropriate issuing authority (e.g., via their web site) to determine if existing version is still current 3) To check for currency or to obtain a new document: a) Keep in mind sourcing a pdf document is quicker and better than scanning a fax or hardcopy to pdf b) Open Documents screen – SMA → Setup → Documents c) Select desired external document to check d) Click on previously save link in “Web Address” box within SMA → Documents e) If no address in “Web Address” box, then double click on empty “Web Address” box in SMA → Documents to open search box of web browser and search for required external document f) If link in “Web Address” doesn’t open the correct web site, then delete address and double click on empty “Web Address” box in SMA → Documents to open search box of web browser and search for required external document g) Determine if latest document on source website is later than existing version (in ***SMA***) by comparing document version on source web site with existing document version information on ***SMA Document Control Register***

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f) **System Administrator** **Chairman** **Document Controller**	**Downloading New and Updated External Documents**	1) When updating if external document versions are the same on source web site and on ***SMA - Document Control Register***: a) No need to download from source website b) Enter in ***Document Control Register*** screen (or re-enter if already recorded in line above): i) Document Date ii) Version Number c) Date checked in "Date Doc Currency Checked" d) Enter date to recheck document next in "Expiry Date" column (usually 12 months from date last checked) 2) If document on source website is later or if downloading a new document to SMA: a) Highlight and copy URL (Net address) (Ctrl C) in web browser and paste to "Web Address" box in SMA Documents screen to use when next check is due b) Download later version of document from source web site c) When document opens after downloading then save to appropriate folder(s) on server: i) C:\PNSG SMA\PNSG Backend\Documents \External Documents ii) Choose a short "friendly" name, preferably less than 30 characters that clearly identifies the document to typical ***SMA*** users e.g., OH&S Regs. If a legal document, then include document type e.g., "Act", "Regs", "CoP" (Code of Practice) or "Guide" d) If updating a document previously saved to the server and entered into ***SMA*** then just ensure latest document overwrites the superseded document KEEPING ORIGINAL FILE NAME e) Close browser 3) Click on "Update Document Register" button and enter details of new document: a) Document Date b) Version Number c) Date downloaded in "Date Doc Currency Checked" d) Date when to recheck document currency in "Expiry Date" 4) Print out ***SMA Document Control Register*** and pass to **competent person** to review register and relevant external documents listed for review of company compliance on the register

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g) **Chairman** **Document Controller** **System Administrator**	**Review New and Updated External Documents**	1) External document reviews are only to be carried out by reviewers who have sufficient QOSHE and technical knowledge and understanding 2) Receive ***SMA Document Control Register*** showing document currency has been carried out 3) If OH&S Regulations are required to be reviewed, then use: a) Use Compilation Table (within OH&S Regulations) to identify changes to regulations 4) Determine if contents of document(s) require QOHSE management system to be amended (print out documents e.g., external docs /procedures /forms and liaise with other personnel as necessary) 5) Tick "Changes Required" box if changes to SMA /QOSHE management system are required 6) Enter name initials in "Reviewed By" column on printed copy of ***SMA Document Control Register*** as evidence of review 7) Discuss /consult with staff to identify possible changes to QOSHE management system, mark up required changes to documents in QOSHE management system 8) Approve planned changes to QOSHE management system by initialling in "Approved By" column or leave blank if no changes are required 9) Consider if date to recheck document in "Expiry Date" column is appropriate, modify as necessary 10) Pass ***SMA Document Control Register*** and marked up documents (inc external document(s) with reviewer's initials on each external document) to **Document Controller** or delegate to update SMA /QOSHE management system
h) **System Administrator** **Chairman** **Document Controller**	**Modify QOSHE Documents and SMA**	1) **Document Controller** (or delegate): a) Receive marked up ***SMA Document Control Register*** and other marked up documents from reviewer to update SMA /QOSHE management system b) If changes to procedures, forms etc are required: i) Make necessary changes to SMA /QOSHE management system ii) Enter initials into "Changes Made By", "Date Changes Made" and add recipient "Copies To" columns in ***SMA Document Control Register*** iii) Modify date to recheck document in "Expiry Date" column ifs required by reviewer c) If no changes are required then leave "Changes Required", "Changes Made By", "Date Changes Made" and "Copies To" columns in SMA Document Control Register blank 2) Record details of new and/of changed documents in Changes and Custodians (***SMA → Main Menu → Changes and Custodians***) 3) Identify, plan and implement staff training as necessary (refer ***FC-02 HR,*** to inform staff of relevant external document changes

WHO	KEY STEPS	CLARIFICATION
	5. SUGGESTIONS AND IMPROVEMENTS	
a) **Chairman** **Document Controller,** **System Administrator**	**Suggestions and Improvements**	1) Raise ***Improvement Log*** (IL) for each suggestion or undesirable incident that has happened or has the potential to happen 2) Pass to **System Administrator** to consider raising an Improvement /Suggestion entry in ***SMA Database***