

Agenda and Three Methods for Presenting the ISO 9001:2008 Auditor Training Course and Forms

This document is an overview of 3 methods that can be used for presenting this training course. A complete discussion on preparing materials and setting up to present this course is found in Tab 4 of the Trainer Manual.

RABQSA compliant course

This course meets RABQSA Internal Auditor Training Course requirements for course objectives, course content, training methods, and student evaluation defined in RABQSA TP5.INTRNL 1 January 2005.

Three Methods for Teaching This Course

There are three methods that can be used to teach this course – the Classroom Method, the Fast Method, and the Self-Learning Method.

Classroom Method - All instruction takes place in the classroom. The Trainer tells Trainees to read about 1/3 of a page of text at a time and the content is reviewed. Much of this course is interactive – i.e. Trainees are asked to look at documents, make observations and answer questions. Users report that classroom training takes 3 days.

FAST Method - The course is divided into 5 Sections. Trainees are given a reading assignment and told to underline important statements in the text. If something is not totally clear, the Trainee should put a question mark (?) in the margin. Marked items are discussed during a Review Session with the Trainer.

Most organizations use the **FAST Method**. This method is faster because it takes less time on the part of the Trainer. A Review Session that takes place after a reading assignment can range from 1 to 2 hours.

Self-Learning Method

These materials were designed so a person can just read the material to learn the ISO requirements and how to conduct process audits. One or more Review Sessions with the person who is most familiar with the organization's quality system is suggested when this method is used. Why? Trainees should have a review of how the organization meets the ISO requirements and an opportunity to ask questions about the course content. The Self-Learning Method also works well when you need to add one or two new auditors to your audit team. The new auditor(s) observe an experienced auditor conduct several audits. The new auditor then conducts an audit that is supervised by the Lead Auditor.

The Self Learning Method is most effective in these situations:

- The person has no prior knowledge or experience and really wants to learn this information
- The person will write a list of all the questions he/she has related to the course content. These items are discussed during a materials review with the Trainer.
- The person has been at the company for more than one year and has some knowledge of how the company works

Trainees keep track of the time they spend on all training activities. The actual investment in time appears on their training certificate.

The Auditor Training Course includes the following topics:

Day 1

1. Background on the ISO 9001 Standard Auditor Manual pages 1-11

2. Review of ISO 9000:2008 (Fundamentals and vocabulary) Auditor Manual pages 11-18

Classroom Method: Review pages 1-18 in class, or use the

FAST Method: This can be a reading assignment – reviewed during the 1st Review Session

Introduction of the “ISO 9001 Explained” computer file on your computer system

Have a computer available in the classroom. Show Trainees how to access “ISO 9001 Explained” on your company's computer system. The file name is: iso 9001-2008 explained rev 2-20-09.pdf

This pdf file has the same content as Manual 1 – Requirements Explained. The pdf file also has links to illustration documents that are the same as the illustrations in Manual 2 – Exhibits.

Show Trainees how the navigation works on the pdf file.

Example: Clicking on the numbered Clause on page 1 of the pdf file will take you to that clause in the document.

Example: Click on the search icon (the binoculars); enter the term “quality policy”. The dialogue box will identify all locations where the quality policy is mentioned in the text.

The pdf computer file for “ISO 9001 Explained” is used for reference after the course is completed.

“Manual 1 – Requirements Explained” and “Manual 2 – Exhibits” are used to learn the standard. Printed text is easier to read than a computer file. Trainees can also underline and margin mark in the Manuals.

Day 1 and Day 2

3. Review of the ISO 9001:2008 Standard

(using Manual 1 - Requirements Explained and Manual 2 - Exhibits)

The Trainer also identifies how the organization meets clause requirements.

Classroom method:

- The Trainer reviews the written explanation of the standard during classroom time.
- Trainees place a check mark in the margin of the text next to items that are new to them.
A check mark means – review this later.
- The Trainer identifies how your organization meets the ISO requirements
- Trainees record how the organization meets ISO requirements using the forms titled – “How We Meet ISO Requirements”

FAST Method:

- Trainees are given 3 reading assignments. Each is followed by a Review Session.
- Trainees place a question mark (?) in the text margin when they want to discuss an item during the Review Session
- The reading assignments in Manual 1 Requirements are:
1st Assignment – Main clauses 4, 5 and 6
2nd Assignment – Main clause 7
3rd Assignment – Main clause 8
- The Trainer identifies how your organization meets the ISO requirements
- Trainees record how the organization meets ISO requirements using the forms titled – “How We Meet ISO Requirements”

Heading on the forms titled “How We Meet ISO Requirements”

Review This Clause?	How We Meet ISO Requirements Clause 4 Quality Management System	Quality Manual /Type of Document ?	Software Driven
	<p>Instructions: Your Trainer will identify how your organization meets the requirements in each ISO clause. This information is in the <u>Quality Manual, your documents, or is accomplished with a computer program.</u> Use this document to write a note about how your organization meets the ISO clause requirements. Place a check mark in the "Review This Clause?" column when you want to review this clause.</p>		

Note: Most training courses use PowerPoint slides and the Trainer reads the ISO requirements to Trainees. No detailed explanation of what the requirements mean is provided. In contrast, this course provides a detailed explanation of the standard in printed text and on a computer file.

Why are the “How We Meet ISO Requirements” forms so important?

Many people cannot make the transition from the requirements to how the organization meets the requirements. This is why the Trainer must identify and review the document, form, software, or other method that the organization uses to meet the ISO requirements.

Day 3

4. General audit information

Auditor Manual pages 22-36

- Audit vocabulary
- Qualifications for auditors
- Methods used to structure audits
- Planning audits
- Auditing a process
- Auditing techniques
- Obtaining objective evidence
- Sampling

5. Steps taken to conduct an audit

Auditor Manual pages 36-107

This is a detailed explanation for each statement on the **Audit Steps Card**. (See Audit Steps Card.)

- The audit assignment and collecting documents
- Document review
- Pre-Audit Meeting
- Confirm the audit plan
- Interview the Area Manager
- How to audit a documented and undocumented process
- Summarize results with the Manager
- Write the Audit Report
- Verification follow-up

Note: The **Audit Steps Card** shows each step of the audit at a glance. It is included in this course because retention of information is minimal when audits may only take place every several months. Trainees use the Audit Steps Card as a reference when they do their first several audits.

Instructions on what to do is also “built into” all of the audit forms.

Classroom Method: Pages 22 – 107 can be read and discussed as a classroom event.

FAST Method: Pages 22 – 107 can be a reading assignment followed by a Review Session.

6. Test (30 – 45 minutes)

This is an open book test that focuses on the steps of the audit.

An Answer Sheet and grading scale is provided. Optional: You may have Trainees exchange papers and grade papers as Trainer reads answers from the Answer Sheet. This provides a 3rd review of the Steps of the Audit.

7. Audit Assignments given to Trainees

The Trainer determines Audit Assignments prior to training.

Trainees collect documents, do document review and complete the Audit Plan Form

This is a class activity.

Trainees conduct audits supervised by the Trainer. The Trainer Manual explains how to plan and carry out a supervised audit.

8. Trainees complete Corrective Action Requests for any nonconformances found and an Audit Report Form

Trainees submit all paperwork to the Trainer in a labeled file folder in defined order.

Trainer completes “Auditor Qualifications and Training Record” form

Trainees complete “Course Evaluation Form”

Attendees receive a “Certificate of Accreditation – Auditor Training” form.

This certificate (form) is in Directory: Trainer Manual

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