1. **Understand the expiration date**

In order to plan, you need to understand the expiration date of ISO 9001:2008 and ISO 14001:2004. Any certificate issued after September 15, 2015 will have an expiration date of September 15, 2018. In order not to have a lapse in the certification, Orion wants the clients to have completed their audit and proper actions for audit nonconformance’s by July 13, 2018 so there will be time to process the documentation. Thus, it is not wise to have an upgrade audit after July 1, 2018.

1. **Purchase a copy of the Standard(s)**

The two primary sources to purchase the standards are ANSI and ISO electronic standard stores on their website. The ANSI Website is [www.ansi.org](http://www.ansi.org) and the ISO [www.iso.org](http://www.iso.org).

1. **Understand the changes in the Standard(s)**

There are many sources of information from training classes, web articles, and consultants. In order to help you understand the changes in the standards, in the near future Orion will provide the following documents:

* ISO 9001 and ISO 14001 presentation on the changes titled: “ISO 9001:2015 and ISO 14001:2015 Changes”
* Orion ISO 9001:2015 and ISO 14001:2015 Upgrade Checklists

1. **Implement the changes in the Standard(s)**

Provide the resources and knowledge to implement the changes of the new revisions. In order to be certified to the new standard(s) revision(s), an internal audit must be conducted to the new standard changes and a Management Review must be conducted which evaluates the effectiveness of the changes to the management system(s). Orion offers a “gap analysis” or Pre Assessment to review implementation of the changes.

1. **Decide on what method to upgrade the Standard(s)**

Orion has two options to upgrade to the new revisions which are: upgrade during surveillance or upgrade during a recertification audit. The logic for which event to use is: did you rewrite your management system documentation or did you just make changes to the management system?

* 1. If you rewrote the documentation a recertification audit is required. Orion normally will not add any additional time for the upgrade for a recertification audit.
  2. If you made changes to the documentation you can upgrade during surveillance or recertification audit. Orion will normally add at least ½ day for upgrading during surveillance.

For additional details see “Orion Upgrade Audit Time Guidance” which is located on the Orion

Website, [www.orion4value.com](http://www.orion4value.com).

**In order to upgrade, Orion requires the following:**

* Complete and submit both the “Orion Upgrade Questionnaire” and the specific standard(s) “Footprint Chart”
* Identify which audit activity and when and let Orion scheduling know well in advance
* Send request and documents listed above to [marketing@orion4value.com](mailto:marketing@orion4value.com).

1. **Upgrade Audits Performed and Corrective Actions Completed**

Orion will perform the audit and all major nonconformance’s must be closed and minor nonconformance’s must be acceptable before the certification to the new standard(s) can be accomplished.

***All documents referenced will be available on the Orion website at*** [***www.orion4value.com***](http://www.orion4value.com)