ISO 50001:2018 Audit Checklist

Energy Management Systems | Downloadable Website Resource

Prepared by	Pacific Certifications
Resource Type	Website Downloadable PDF
Standard	ISO 50001:2018 - Energy Management Systems
Use	Internal readiness review, implementation planning and certification preparation

This resource is intended for educational and internal readiness purposes. It does not replace the official ISO 50001:2018 standard, legal energy requirements, regulatory obligations or a formal certification assessment. Organizations should use the applicable ISO standard text and their own operational context when completing the template.

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ISO 50001:2018 Audit Checklist

This checklist supports an internal conformity review of an Energy Management System against ISO 50001:2018. It can be used to structure interviews, document review and evidence collection before certification assessment.

How to use this document

Review each requirement area against existing policies, records, operational controls and energy performance evidence. Record the current status, identify gaps and assign actions with responsibility and target dates. For downloadable website use, the PDF can be paired with an application form, certification cost calculator and ISO 50001 service page CTA.

Rating	Meaning	Suggested Use
C	Conforming	Requirement appears implemented and supported by evidence.
PC	Partially Conforming	Some evidence exists, but implementation or records are incomplete.
NC	Nonconforming	Requirement is not effectively implemented or evidence is missing.
NA	Not Applicable	Requirement is not applicable; justification should be recorded.

Clause-wise Audit Checklist

Clause	Requirement Area	Checklist Questions	Evidence to Review	Status	Notes
4.1	Context of the organization	Have internal and external energy issues been identified and reviewed?	Context analysis, energy profile, risk/opportunity log	C / PC / NC / NA	
4.2	Interested parties	Are relevant interested parties and their energy-related requirements determined?	Stakeholder list, legal register, contractual obligations	C / PC / NC / NA	
4.3	Scope and boundaries	Is the scope clear and consistent with energy use, consumption and activities?	Scope statement, site list, boundary diagram	C / PC / NC / NA	
4.4	EnMS processes	Are EnMS processes established, implemented, maintained and improved?	Process map, procedures, KPI dashboard	C / PC / NC / NA	
5.1	Leadership	Does top management support the EnMS and energy performance improvement?	Management commitments, resources, review minutes	C / PC / NC / NA	
5.2	Energy policy	Is the policy appropriate, available and communicated?	Approved policy, communication records, review records	C / PC / NC / NA	
5.3	Roles and responsibilities	Are roles for the energy team and process owners assigned?	RACI matrix, appointment letters, job descriptions	C / PC / NC / NA	
6.1	Risks and opportunities	Are actions planned to address EnMS risks and opportunities?	Risk register, action plan, effectiveness review	C / PC / NC / NA	
6.2	Objectives and targets	Are objectives measurable and linked to energy performance improvement?	Objectives tracker, target plans, performance results	C / PC / NC / NA	
6.3	Energy review	Does the energy review analyze energy use, consumption, SEUs and improvement opportunities?	Energy review report, SEU register, opportunity list	C / PC / NC / NA	
6.4	EnPIs	Are energy performance indicators suitable and maintained?	EnPI definitions, dashboards, calculation methods	C / PC / NC / NA	

Clause	Requirement Area	Checklist Questions	Evidence to Review	Status	Notes
6.5	Energy baseline	Is a baseline established and adjusted when relevant variables change?	Baseline report, adjustment criteria, historical data	C / PC / NC / NA	
6.6	Data collection plan	Is energy data collected consistently and adequately?	Metering plan, readings, calibration/service records	C / PC / NC / NA	
7.1	Resources	Are resources available for EnMS operation and improvement?	Budget, meters, software tools, personnel records	C / PC / NC / NA	
7.2	Competence	Are personnel competent for roles affecting energy performance?	Competence matrix, training records, evaluation evidence	C / PC / NC / NA	
7.3	Awareness	Are employees aware of energy policy, objectives and impacts?	Awareness records, communications, posters/toolbox talks	C / PC / NC / NA	
7.4	Communication	Are EnMS communications planned and controlled?	Communication plan, records, external notifications	C / PC / NC / NA	
7.5	Documented information	Is required documented information controlled and retained?	Document master list, revision history, retained records	C / PC / NC / NA	
8.1	Operational control	Are significant energy uses controlled under planned conditions?	SOPs, operating parameters, maintenance records	C / PC / NC / NA	
8.2	Design	Is energy performance considered in design and modification activities?	Project review forms, specifications, lifecycle calculations	C / PC / NC / NA	
8.3	Procurement	Are procurement requirements for energy performance communicated?	Purchase specifications, supplier criteria, equipment ratings	C / PC / NC / NA	
9.1	Monitoring and measurement	Is EnMS performance monitored, measured, analyzed and evaluated?	Monitoring reports, energy trend analysis, EnPI review	C / PC / NC / NA	
9.1.2	Compliance evaluation	Are compliance obligations evaluated at planned intervals?	Compliance checklist, legal updates, evaluation records	C / PC / NC / NA	
9.2	Internal audit	Is an internal audit program planned and implemented?	Audit schedule, reports, findings, closure evidence	C / PC / NC / NA	
9.3	Management review	Are required inputs and outputs included in management review?	Management review minutes, decisions, action follow-up	C / PC / NC / NA	
10.1	Corrective action	Are nonconformities corrected and causes addressed?	NC reports, root cause analysis, action verification	C / PC / NC / NA	
10.2	Continual improvement	Is continual improvement of EnMS and energy performance demonstrated?	Improvement projects, savings records, updated action plans	C / PC / NC / NA	

Energy Performance Review Prompts

Area	Review Prompt	Evidence / Notes
Significant Energy Uses	Which facilities, systems, processes or equipment consume the most energy and how are they controlled?	
Relevant Variables	Which variables affect energy performance such as production volume, weather, occupancy or operating hours?	
EnPIs and Baselines	Are EnPIs and baselines meaningful, updated and able to demonstrate performance improvement?	
Operational Control	Are operational parameters, maintenance routines and competence requirements defined for SEUs?	
Improvement Projects	Are energy-saving projects prioritized, tracked and verified for results?	