



ISAB Mandatory Document for the Use of Information and Communication Technology (ICT) for Conformity Assessment Purposes

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0. INTRODUCTION

0.1 As information and communication technology (ICT) becomes more sophisticated, it is important to be able to use ICT to optimize the effectiveness and efficiency in conformity assessment activities, for example, certification audits, validation/verification engagements and accreditation assessments, and to support and maintain the integrity of the conformity assessment process.

0.2 ICT is the use of technology for gathering, storing, retrieving, processing, analysing and transmitting information. It includes software and hardware, such as smartphones, handheld devices, laptop computers, desktop computers, drones, video cameras, wearable technology, artificial intelligence, and others. The use of ICT may be appropriate whether onsite or using remote auditing methods.

0.3 Examples of the use of ICT for conformity assessment may include but are not limited to:

- Meetings and interviews; by means of electronic meeting systems, including audio, video and data sharing.
- Audit/assessment of documents and records by means of remote access, either synchronously (in real time) or asynchronously (when applicable).
- Recording of information and evidence by means of still video, video or audio recordings.



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- Providing visual/audio access to remote or potentially hazardous locations.

0.4 The objectives for the effective application of ICT for conformity assessment purposes are:

- To provide a methodology for the use of ICT that is sufficiently flexible and non-prescriptive in nature to optimize the conventional audit/assessment process.
- To ensure that adequate controls are in place to avoid abuses that could compromise the integrity of the audit/assessment process.
- To support the principles of safety and sustainability.

Measures shall also be taken to ensure that security and confidentiality are maintained throughout conformity assessment activities.

0.5 Other schemes, normative documents, conformity assessment standards and legislation may impose limitations and/or additional requirements on the use of ICT for conformity assessment and may take precedence over this document.

1. SCOPE

This mandatory document provides for the consistent application of information and communication technology when used as part of the conformity assessment methodology. The scope of this document includes management systems, validation and verification, personnel certification and product certification. The document is applicable to conformity assessment bodies and accreditation bodies. The use of ICT is not mandatory and may be used for other types of conformity assessment activities, but if used as part of the conformity assessment methodology, it is mandatory to conform to this document.

2. NORMATIVE REFERENCES

For the purposes of this document, the normative references given below apply, depending upon the conformity assessment activity:

- ISO/IEC 17011 Conformity assessment - Requirements for accreditation bodies accrediting conformity assessment bodies
- ISO/IEC 17021-1 - Conformity assessment - Requirements for bodies providing audit and certification of management systems Part 1: Requirements
- ISO/IEC 17065 - Conformity assessment - Requirements for bodies certifying products, processes and services
- ISO/IEC 17024 - Conformity assessment - General requirements for bodies operating certification of persons



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- ISO/IEC 17029 - Conformity assessment - General principles and requirements for validation and verification bodies

This MD may also be considered for use with other conformity assessment standards. Additionally, guidance can be obtained from ISAB ID 12, ISO 19011, and ISO/IEC TS 17012.

3. DEFINITIONS

Virtual Site: Virtual location where a client organization performs work or provides a service using an on-line environment allowing persons irrespective of physical locations to execute processes.

Note 1: A virtual site cannot be considered where the processes must be executed in a physical environment, e.g., warehousing, manufacturing, physical testing laboratories, installation or repairs to physical products.

Note 2: A virtual site is considered a single site for the calculation of conformity assessment time.

4. REQUIREMENTS

4.1 Security and Confidentiality

4.1.1 The security and confidentiality of electronic or electronically transmitted information and the privacy of individuals shall be ensured when using ICT for conformity assessment purposes.

4.1.2 The use of ICT for conformity assessment purposes shall be mutually agreed upon by the body being audited/assessed and the body performing the conformity assessment activities in accordance with information security and data protection measures and regulations before ICT is used for conformity assessment purposes.

4.1.3 In the case of non-fulfilment of these measures or non-agreement of information security and data protection measures, the body performing the conformity assessment activities shall use other methods to conduct the conformity assessment.

4.1.4 When no agreement is reached for the use of ICT for conformity assessment, other methods shall be used to fulfil conformity assessment objectives.

4.2 Process Requirements

4.2.1 The body performing the conformity assessment activities shall identify and document the risks and opportunities that may impact conformity assessment effectiveness for the use of ICT,



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including the selection of the technologies, and how they are managed.

4.2.2 When ICT is proposed for the conformity assessment activities, the application review shall include a check that all parties involved in the conformity assessment activity have the necessary infrastructure to support the use of the ICT proposed.

4.2.3 Considering the risks and opportunities identified in 4.2.1, the conformity assessment plan shall identify how ICT will be utilized and the extent to which ICT will be used for conformity assessment purposes to optimize effectiveness and efficiency while maintaining the integrity of the conformity assessment process.

4.2.4 When using ICT, conformity assessment team members (e.g. auditors/assessors) and other involved persons (e.g. drone pilots, technical experts, local authorities) shall have the competency and ability to understand and utilize the information and communication technologies employed to achieve the desired results of the conformity assessment. The conformity assessment team members shall also be aware of the risks and opportunities of the information and communication technologies used and the impacts that they may have on the validity and objectivity of the information gathered.

4.2.5 If ICT is used for conformity assessment purposes, it contributes to the total conformity assessment time as additional planning may be necessary which may impact duration.

4.2.6 Conformity assessment reports and related records shall indicate the extent to which ICT has been used in carrying out the conformity assessment activities and the effectiveness of ICT in achieving the objectives.

4.2.7 If virtual sites are included within the scope, the conformity assessment documentation shall note that virtual sites are included, and the activities performed at the virtual sites shall be identified.