**Instructions for Using the Template**

**For Reference Material Producers (RMP):**

This template identifies the clauses of ISO 17034:2016 and provides UKAS’ opinion on the extent of any changes in requirements from ISO Guide 34:2009. Details of the actual changes are not provided and as such the RMP will need to use this template in conjunction with copies of ISO 17034:2016 and ISO Guide 34:2009.

The RMP needs to identify the change and then determine the impact on their systems, make and implement alternations as necessary, details of alterations made to your systems should then be recorded in this template and the completed template provided to UKAS (normally to your Assessment Manager and/or Customer Liaison Officer) at least 1 month prior to the transition assessment taking place. The submission of the template should be supported by documentation demonstrating how new or changed requirements are met implementation will be assessed at the site visit. If the RMP considers that they currently meet the requirements then this should be stated.

**For UKAS Assessors:**

After reviewing the information and documentation supplied by the RMP and completing the assessment to confirm appropriate implementation you should place your comments regarding the RMP’s conformity with the new requirements in this form. The level of comments provided should be similar to that provided in an assessment report. If any findings are raised relating to new or changed requirements these should be recorded in the IAR as normal but then cross-referenced in this form.

An Executive Summary and Recommendation on transition of accreditation to ISO 17034:2016 must be included at the end of this form.

**Key - Extent of Change:**

* **Structural** – Requirement remains the same but is under a new clause number
* **Minor** – Wording of the requirement has changed but overall intent is consistent
* **Major** – Changes will require the CAB to implement new or change existing practice
* **New** – New requirement not in previous version of the standard

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **TO BE COMPLETED BY RMP** | |  | **TO BE COMPLETED BY UKAS ASSESSORS** | |
| **Organisation Name** |  |  | **Assessment Manager** |  |
| **UKAS Accreditation Number** |  |  | **Assessment Team Members & Roles** |  |
| **Completed by** |  |  | **Date(s) of review** |  |
| **Date of Completion** |  |  | **Issue Date** |  |

| **ISO 17034:2016** | | **ISO Guide 34:2009** | | **EXTENT OF CHANGE** | **TO BE COMPLETED BY RMP** | **TO BE COMPLETED BY UKAS ASSESSORS** |
| --- | --- | --- | --- | --- | --- | --- |
| **CLAUSE** | | **RELATED CLAUSE(S)** | | **CHANGES MADE & DOCUMENTATION SUPPLIED** | **COMMENTS ON COMPLIANCE & REF TO FINDINGS** |
|  | Foreword |  |  | N/A | N/A | N/A |
|  | Introduction |  |  | N/A | N/A | N/A |
| 1. | Scope |  | Scope | N/A | N/A | N/A |
| 2. | Normative references |  | Normative References | N/A | N/A | N/A |
| 3. | Terms & Definitions | 3. | Terms and Definitions | N/A | N/A | N/A |
| 4. | General requirements |  |  | N/A | N/A | N/A |
| 4.1 | Contractual matters | 4.4 | Request, tender and contract reviews | Minor |  | Comments: |
| Finding Ref: |
| 4.2 | Impartiality | 4.2.3 | Organisation and Management | Major |  | Comments: |
| Finding Ref: |
| 4.3 | Confidentiality |  |  | New |  | Comments: |
| Finding Ref: |
| 5. | Structural Requirements | 4.2 | Organisation and Management | Major |  | Comments: |
| Finding Ref: |
| 6. | Resource Requirements |  |  | N/A | N/A | N/A |
| 6.1 | Personnel | 5.2 | Personnel | Minor |  | Comments: |
| Finding Ref: |
| 6.2 | Subcontracting | 5.3  4.5 | Subcontractors  Use of Subcontractors | Minor |  | Comments: |
| Finding Ref: |
| 6.3 | Provision of Equipment, service and supplies | 4.6 | Procurement of services and supplier | Structural |  | Comments: |
| Finding Ref: |
| 6.4 | Facilities and environmental conditions | 5.6 | Accommodation and Environmental Conditions | Minor |  | Comments: |
| Finding Ref: |
| 7. | Technical and Production Requirements |  |  | N/A | N/A | N/A |
| 7.1. | General Requirements |  |  | New |  | Comments: |
| Finding Ref: |
| 7.2. | Production Planning | 5.4 | Production Planning | Minor |  | Comments: |
| Finding Ref: |
| 7.3. | Production Control | 5.5 | Production Control | Minor |  | Comments: |
| Finding Ref: |
| 7.4. | Material Handling and Storage | 5.7 | Material handling and storage | Minor |  | Comments: |
| Finding Ref: |
| 7.5. | Material processing | 5.8 | Material processing | Minor |  | Comments: |
| Finding Ref: |
| 7.6. | Measurement Procedures | 5.9 | Measurement Methods | Minor |  | Comments: |
| Finding Ref: |
| 7.7. | Measuring Equipment | 5.10 | Measuring Equipment | Minor |  | Comments: |
| Finding Ref: |
| 7.8. | Data integrity and evaluation | 5.11 | Data Evaluation | Minor |  | Comments: |
| Finding Ref: |
| 7.9. | Metrological traceability of certified values | 5.12 | Metrological Traceability | Major |  | Comments: |
| Finding Ref: |
| 7.10. | Assessment of homogeneity | 5.13 | Assessment of homogeneity | Minor |  | Comments: |
| Finding Ref: |
| 7.11. | Assessment and Monitoring of Stability | 5.14 | Assessment of Stability | Major |  | Comments: |
| Finding Ref: |
| 7.12. | Characterisation | 5.15 | Characterisation | Major |  | Comments: |
| Finding Ref: |
| 7.13. | Assignment of property values and their uncertainties | 5.16 | Assignment of property values and their uncertainties | Minor |  | Comments: |
| Finding Ref: |
| 7.14. | RM documents and labels | 5.17  5.7.5  ISO Guide 31 | Certificates and documentation for users  Material handling and storage | Structural |  | Comments: |
| Finding Ref: |
| 7.15. | Distribution Service | 5.18 | Distribution Service | Structural |  | Comments: |
| Finding Ref: |
| 7.16. | Control of quality and technical records | 4.13 | Records | Minor |  | Comments: |
| Finding Ref: |
| 7.17. | Management of non-conforming work | 4.9 | Control of non-conforming work and/or reference material | Minor |  | Comments: |
| Finding Ref: |
| 7.18. | Complaints | 4.8 | Complaints | Major |  | Comments: |
| Finding Ref: |
| 8. | Management System Requirements |  |  | N/A | N/A | N/A |
| 8.1. | Options |  |  | New |  | Comments: |
| Finding Ref: |
| 8.2. | Quality Policy | 4.1.2 | Quality Policy | Minor |  | Comments: |
| Finding Ref: |
| 8.3. | General management system documentation | 4.1.1 | General | Minor |  | Comments: |
| Finding Ref: |
| 8.4. | Control of management system documents | 4.3 | Document and information control | Minor |  | Comments: |
| Finding Ref: |
| 8.5. | Control of records | 4.13 | Records | Minor |  | Comments: |
| Finding Ref: |
| 8.6. | Management Review | 4.15 | Management reviews | Minor |  | Comments: |
| Finding Ref: |
| 8.7. | Internal Audit | 4.14 | Internal Audits | Structural |  | Comments: |
| Finding Ref: |
| 8.8. | Action to address risks and opportunities | 4.11 | Preventive actions | Minor |  | Comments: |
| Finding Ref: |
| 8.9. | Corrective actions | 4.10 | Corrective actions | Structural |  | Comments: |
| Finding Ref: |
| 8.10. | Improvement | 4.12 | improvement | Minor |  | Comments: |
| Finding Ref: |
| 8.11. | Feedback from customers | 4.7 | Customer Service | Minor |  | Comments: |
| Finding Ref: |
| Annex A | Summary of production requirements for RMs and CRMs |  |  | N/A | N/A | N/A |
| Bibliography |  |  |  | N/A | N/A | N/A |

**Executive Summary:**

**Recommendation:**