

ISOT Guidance Note 003 – ISO's Meetings Portal

ISO's Central Secretariat (ISO/CS) provides, as part of their suite of tools, the <u>Meetings Portal</u>, a centralized resource that aims to unify the meeting registration process across all ISO Committees and Working Groups (WGs) as well as organize and simplify the overall management of meetings for both committee leaders and ISO National Member Bodies (NMBs).

ISO Committee Managers, Convenors and their support teams will create and manage all of their respective ISO meetings, whether in-person, virtual or hybrid, on the Meetings Portal. The platform allows the committee leadership to connect related meetings, add additional practical logistical information and details on any scheduled social events, as well as track the attendees that register for their meetings.

Once meetings are created on the Meetings Portal, the platform tracks each meeting through its progressive stages (proposed, confirmed, ongoing and closed), provides a helpful checklist of the various tasks associated with running an ISO meeting, and sends important reminders for upcoming milestones and overdue tasks.

The platform will ensure that only authorized individuals are able to register and participate in ISO meetings by checking that their NMB has the appropriate membership in the ISO Committee, and that the expert is officially registered as a member of the particular group meeting. Since the platform is integrated with the ISO system, it will be able to account for membership changes and make any necessary adjustments as they happen.

International experts will register for WG meetings directly through the platform, provided they are registered by their NMB to that WG. National Delegations to ISO Committee meetings will be registered by or approved by their NMB through the platform. Individuals needing Visa Invitation Letters to attend a meeting can request one through the system by entering the required information.

Finally, the Meetings Portal will allow ISO/CS, committee leaders, as well as NMBs to easily run reports on their meetings and participants. Committee leaders will be able to view the participants at their scheduled meetings and social events. NMBs will be able to view all meetings happening in their country and all participants registered on their behalf at meetings around the world.

Note that use of the Meetings Portal is mandatory for both the creation of all meetings and registration for those meetings by attendees.





What this means to you as an ISO Committee Manager:

As an ISO Committee Manager you must create and manage all of your ISO meetings through the ISO Meetings Portal. You should add any proposed meetings to the platform and update the record with relevant information once the details are confirmed. Connecting related meetings, listing any scheduled social events and adding practical information will make the platform more useful for your attendees.

The ISO Meetings Portal is intended to organize and simplify your work related to ISO meetings, so be sure to utilize the helpful functions. Each meeting listing contains a checklist of tasks required by the ISO Directives to help keep you on track and the platform will send you reminders for upcoming milestones.

You should only accept meeting registrants through the ISO Meetings Portal and should direct anyone sending in registrations through email to use the platform or to contact their NMB for help.

What this means to you as a U.S. TAG Secretary:

As a U.S. TAG Secretary, it's important to make sure that your TAG's experts are assigned to the appropriate WGs in the ISO system, or they will not be permitted to register for and attend those WG meetings. When your TAG approves a U.S. expert's participation on an ISO WG, be sure to send the required information (name, email address, organization and stakeholder category) to ISOT. If a U.S. expert should no longer be assigned to an ISO WG, inform ISOT or that individual will continue to be able to attend meetings on behalf of the U.S.

U.S. Delegations to ISO Committee (TC, SC or PC) meetings need to be accredited by ISOT, so send in a completed Delegate Accreditation form as soon as the U.S. TAG has approved their delegation. For hybrid meetings, please specify if the delegate will be attending in-person or virtually. If any of the U.S. attendees need an invitation letter to obtain a Visa, have any dietary restrictions, or plan to attend any scheduled social events, include the required information. ISOT will register the U.S. Delegation through the ISO Meetings Portal.

As long as your TAG's experts are assigned to the appropriate WGs, advise them to register themselves for any WG meetings directly on the ISO Meetings Portal. WG leaders, TAG Leaders and ISOT are not able to register experts to WG meetings.

While WG experts can access WG documents related to WG meetings directly, they will not be able to access ISO Committee meeting documents, such as agendas, logistical information and drafts for discussion (unless they are a TAG Leader). They should be provided those documents through the U.S. TAG.





About the ANSI ISO Team (ISOT)

The American National Standards Institute (ANSI) is the U.S. member body to the International Organization for Standardization (ISO). To ensure a strong and effective U.S. voice in international standardization, the ANSI ISO Team (ISOT) acts as the primary interface for U.S. Stakeholders—between ANSI-accredited U.S. Technical Advisory Groups (U.S. TAGs) and their related ISO Committees, and as the main contact for ANSI-delegated U.S. held ISO secretariats.

ISOT daily operations include monitoring and recording of ISO documents, processing votes on behalf of U.S. TAGs, accrediting delegates to attend international meetings, nominating experts to participate on working groups, coordination with key group such as the ANSI ISO Forum (AIF), ANSI ISO Council (AIC), and the ISO Technical Management Board (TMB), administering ANSI Virtual Technical Advisory Groups (VTAGs), facilitating training programs, among many other functions. In addition to daily responsibilities, ISOT is available to assist with any committee specific issues U.S. TAGs or U.S. held secretariats may be facing. ISOT staff is well versed in the ISO procedures, ANSI International Procedures, and has experience in all aspects of the ISO process.

For organizations that are new to ISO or want additional support with ISO related activities, ANSI's ISOT staff provides hands-on, practical guidance on all aspects of administration of U.S. TAGs or ISO Secretariats through its fee-based Enhanced Services program. For more information, contact isot@ansi.org.

<u>ISOT FAQs</u> Additional resources can be found on ISOT's SharePoint site (https://share.ansi.org/isot).



