



ANSI ISO Team (ISOT)



isot@ansi.org

Workflows for ANSI-Accredited U.S. TAG Secretaries

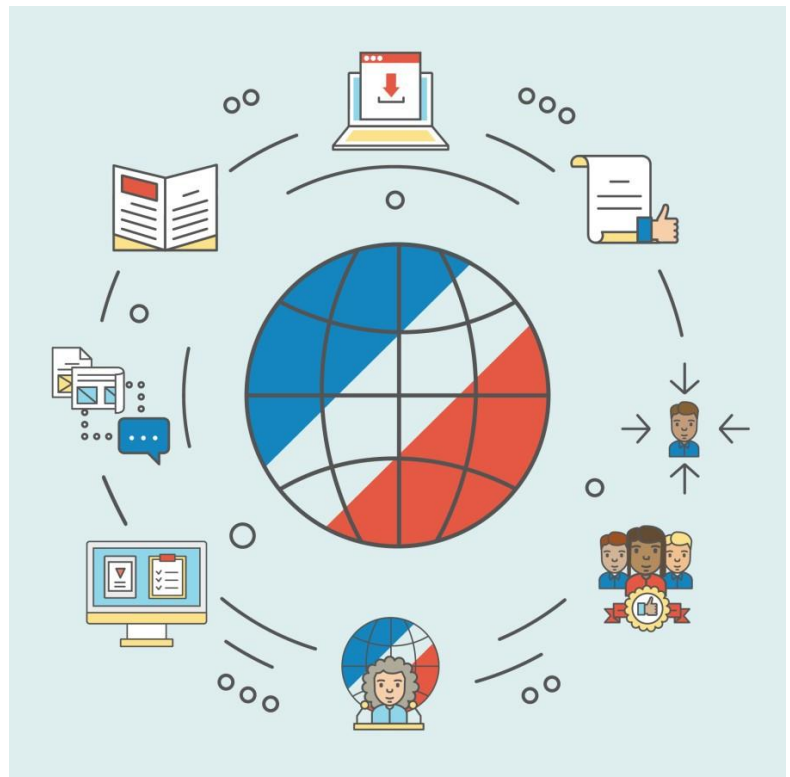




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INTRODUCTION

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 interface between ANSI-accredited U.S. Technical Advisory Groups (U.S. TAGs) and/or ANSI-delegated U.S. held ISO secretariats and ISO.

Working closely with the U.S. TAG Secretaries, ISOT processes votes on behalf of U.S. TAGs, accredits delegates to attend international meetings, registers experts to participate on working groups, writes the official invitation letters on behalf of the TAG for ISO Committee meetings being held in the U.S., submits U.S. New Work Item Proposals on behalf of the U.S. TAG, supplies U.S. TAG Secretaries with published standards when appropriate, and produces helpful reference documents.

The workflows outlined in this document are intended to serve as a reference for U.S. TAG Secretaries to use when performing their daily standards work. Whether you are a new U.S. TAG Secretary just stepping into your role, or you are a U.S. TAG Secretary who wants a refresher, we hope these workflows are helpful in explaining how a U.S. TAG Secretary should interface with ISOT to get their work done in an efficient and effective way.



DEFINITIONS

ANSI's ISO Team: The ANSI ISO Team (ISOT) acts as the interface between ANSI-accredited U.S. Technical Advisory Groups (U.S. TAGs) and ISO Secretariats. ISOT is also a resource to U.S. TAG Secretaries, U.S. TAG Chairs, U.S.-based ISO Secretariats and U.S.-based ISO Chairs. You can contact them with questions via ISOT@ansi.org.

ANSI's SharePoint site: [ANSI's SharePoint site](#) hosts a number of resource folders and documents for U.S. TAG Secretaries and Chairs. All ISOT Forms and Procedures, and well as ISOT Guidance Notes, can all be found and downloaded [here](#).

Head of Delegation (HoD): For every ISO Committee meeting, the U.S. TAG must designate one U.S. delegate to be the Head of Delegation. This individual has the responsibility to speak for the entire U.S. delegation, chair U.S. delegation meetings at ISO meetings as necessary, and submit the HoD Report to ISOT when the meeting is over. If only one delegate is attending an ISO meeting on behalf of the U.S. TAG, by default they are the HoD.

ISO Ballots:

- CD:** Committee Draft
- CIB:** Committee Internal Ballot
- DIS:** Draft International Standard
- FDIS:** Final Draft International Standard
- NWIP:** New Work Item Proposal
- SR:** Systematic Review

ISO Committee: ISO technical activities at various levels including ISO technical committees (TC), subcommittees (SC), project committees (PC) and joint committees (JTC/JPC). The term does not refer to Working Groups (WGs).

ISO Portal: The [ISO Portal](#) hosts a variety of different electronic applications for TAG Secretaries use. Some include the [ISO Balloting Portal](#), [ISO Documents](#), [ISO Meeting Platform](#) and ISO Global Directory:

- **ISO Balloting Portal:** The ISO Balloting Portal hosts all ballots for a given committee. U.S. TAG Secretaries and Chairs are able to view both open and closed ballots of their committee.
- **ISO Documents:** The ISO Documents site is the ISO webpage that ISO Committee Managers and WG Conveners post committee documents to. ISOT is registered in the ISO Livelink system as a Centralized Committee Member for all ISO Committees. U.S. TAG Leadership for ISO Committees use this site to download their committee documents.

- **ISO Meeting Platform:** The ISO Meeting Participant Platform is the ISO webpage that ISO Committee Managers and WG Conveners use to manage their meetings, and WG experts self-register for WG meetings.
- **ISO Global Directory:** ANSI, as the U.S. member body to ISO, uses the ISO Global Directory to register and maintain individuals authorized by the U.S. TAG to act as representatives on WGs. U.S. TAG leaders and ISO Committee officers do **not** have access to the ISO Global Directory. Registration in the ISO Global Directory dictates an individual's access to documents on ISO Documents.

Management System Standard (MSS): An ISO standard that provides a model to follow when setting up and operating a management system.

U.S. Technical Advisory Group (U.S. TAG): U.S. Technical Advisory Groups (U.S. TAGs) are committees accredited by ANSI for participation in ISO technical activities or appointed by the USNC for participation in IEC technical activities. U.S. TAGs operate in compliance with Annex B of the [ANSI International Procedures](#) "Criteria for the Development and Coordination of U.S. Positions in the International Standardization Activities of the ISO and IEC". U.S. TAG Secretaries, who are appointed by ANSI to be responsible for ensuring compliance with TAG procedures, administer U.S. TAGs.

Working Groups (WGs): For the purpose of these workflows, Working Groups will include any subgroup of a TC, PC or SC. Examples include Working Groups (WGs), Joint Working Groups (JWGs), Ad Hoc Groups (AHGs) Advisory Groups (AGs), Study Groups (SGs) and Task Groups (TGs) among others.

For a larger list of commonly used acronyms within ANSI and ISO, please see the "Info - Commonly Used Acronyms" document located on [ANSI's SharePoint site](#) in the "Other ISOT Resources" folder.



U.S. TAG OPERATIONS COURSE

Purpose:

This workflow outlines how a U.S. TAG Secretary accesses and uses the U.S. TAG Operations Course.

Relevant Terms:

- ANSI's ISO Team (ISOT)
- U.S. Technical Advisory Group (U.S. TAG)
- [Training web link](#)

Forms: N/A

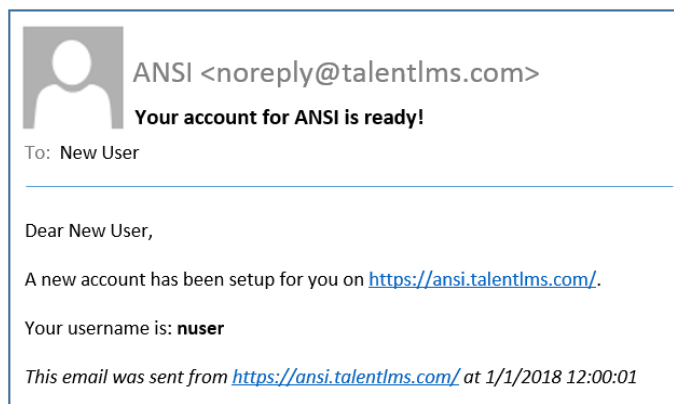
Procedure:

For first time users, follow steps 1 – 10 below. If you have already set up an account, follow steps 3 – 10 to complete the training.

1. Open the training web link: <https://ansi.talentlms.com>
2. Click "Sign up" on the top right-hand corner of the webpage and follow the prompt to set up your account.

NOTE: When creating your account, please use the email address on file with ANSI.

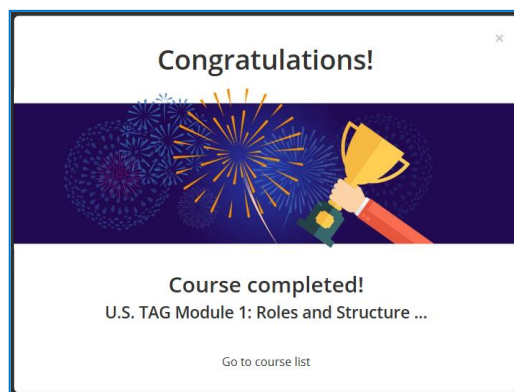
NOTE: ANSI needs to approve each user before you begin the training. The approval process will take less than an hour during regular business hours. Once ANSI has approved your registration, you will receive an email confirming your registration:



3. Upon receiving the above email, open the training web link (<https://ansi.talentlms.com>) to start your training.
4. The U.S. TAG and Secretariat training courses are comprised of a number of modules. To start, click on a Module and when it opens press play. They are outlined on the home screen as follows:

Taking the Secret out of Secretariat: ISO Secretariat Operations		
Secretariat Module 1: Committee Officers (21:19)	0%	INFO
Secretariat Module 2: Striving For A Higher Goal (55:53)	0%	INFO
Secretariat Module 3: Meet and Greet (17:45)	0%	INFO
Secretariat Module 4: Special Issues for Secretariats (20:57)	0%	INFO
Supplemental Information & ANSI Contact Support (00:20)	0%	INFO
U.S. TAG Operations Training		
U.S. TAG Module 1: Roles and Structure (14:43)	0%	INFO
U.S. TAG Module 2: Accreditation of U.S. TAGs (25:11)	0%	INFO
U.S. TAG Module 3: Role of U.S. TAGs in the Development of ISO Deliverables (33:52)	0%	INFO
U.S. TAG Module 4: Voting (17:36)	0%	INFO
U.S. TAG Module 5: Overview of Electronic Services of ANSI & ISO (25:40)	0%	INFO
U.S. TAG Module 6: Effective Participation and Strategies (23:51)	0%	INFO

5. Watch the Module in its entirety. At the end of the Module, the Completed. **Let us continue >** link will become active. Upon clicking this link you will be directed to a brief quiz on that Module.
6. Click the **Start test** button to begin the quiz and complete the questions. Upon completing the quiz, a screen will pop-up informing you that the Module was completed:



7. Click on **“Go to course list”** to be brought back to the home screen and complete the remaining Modules at your own pace following this process.
8. After completing all of the modules, you will receive a certificate via email.

NOTE: The U.S. TAG Operations Course is required for U.S. TAG Secretaries to take one time upon assignment to their role. U.S. TAG Secretaries that have previously completed the U.S. TAG Operations Training Course do not have to take the course again. Instead, they should take the “ISO Directives Updates” course, posted to [Standardslearn.org](https://standardslearn.org) annually thereafter.

NOTE: The U.S. TAG Operations Course is intended for U.S. TAG Secretaries. We understand that the course may also be useful to those beyond U.S. TAG leaders and ISOT will evaluate these applicants on a case-by-case basis.



HOW TO ACCESS YOUR COMMITTEE DOCUMENTS

Purpose:

This workflow outlines how a U.S. TAG Secretary accesses and distributes their committee documents.

Relevant Terms:

- ANSI's ISO Team (ISOT)
- U.S. Technical Advisory Group (U.S. TAG)
- ISO Documents

Forms: N/A

Procedure:

1. To access the committee documents, the U.S. TAG Secretary should navigate to the [ISO Documents site](#).
2. When prompted with the following log-in screen, the U.S. TAG Secretary should sign in using their ISO username (registered email address) and password. You should have received an email from ISO with instructions on how to set your password:

Sign in using your ISO credentials

Username

Password

I forgot my password

☒ I have read and accept the declaration on copyright and data protection for participants in ISO activities.

Sign in

OR

Sign in using your credentials from another organization

Standardization Identity Federation

3. Once logged in, the U.S. TAG Secretary should navigate to their appropriate ISO Committee.

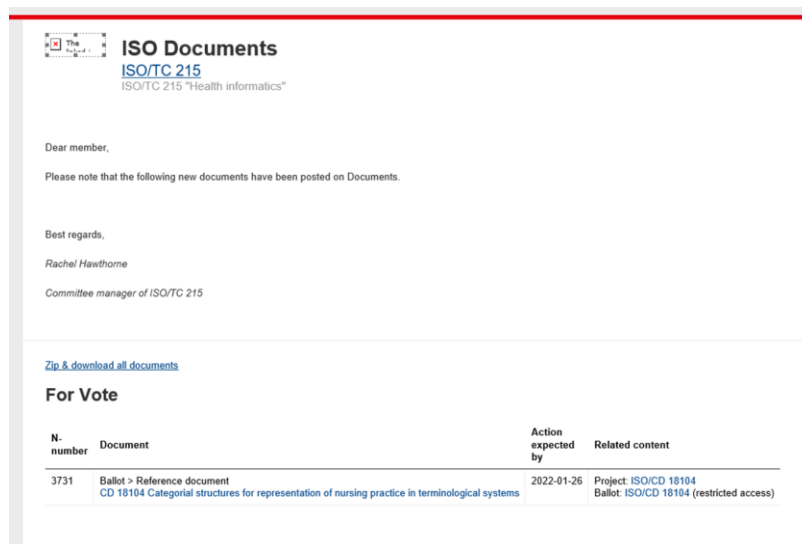
NOTE: U.S. TAG Secretaries will only be able to see the full committee pages of the committees they are assigned to in the ISO Global Directory.

NOTE: Should an expert forget their password for the ISO Portal, they can reset it themselves by following the, “I forgot my password” link on the login screen. If an expert continues to experience difficulties logging in, the expert can email ISOT@ansi.org for further assistance.

4. Using Once in the committee folder, the U.S. TAG Secretary can navigate to “See all documents” to view a running list of committee documents. The U.S. TAG Secretary can click to download documents individually or select multiple documents to download to a zip file. Once downloaded, the U.S. TAG Secretary adds any additional information or due dates and distributes the documents to the rest of the U.S. TAG as appropriate.

NOTE: Please refer to the AIF Support series notes on the ISO Documents Platform [here](#) for more information.

5. As an alternative procedure, U.S. TAG Secretaries can also click through the hyperlinks located in ISO notification emails to download individual documents, or choose to download all documents as a ZIP file. These notifications are sent out when new N documents are circulated by the ISO Committee Manager. Here is a screenshot of an example ISO notification email:



6. For any questions or issues with this process, feel free to email ISOT at ISOT@ansi.org.



HOW TO ACCESS YOUR COMMITTEE BALLOTS

Purpose:

This workflow outlines how the U.S. TAG Secretary accesses and distributes their committee ballots.

Relevant Terms:

- ANSI's ISO Team
- U.S. Technical Advisory Group (U.S. TAG)
- [ISO Balloting Portal](#)

Forms: N/A

Procedure:

1. To access your committee ballots, the U.S. TAG Secretary should navigate to the [ISO Balloting Platform](#).
2. After using your ISO sign-in credentials to get into the site, ANSI recommends that the U.S. TAG Secretary navigate to the "All Ballot Instances" link.
3. Once the "All Ballot Instances" link is clicked, you will be taken to a page that looks similarly to the following:

All ballot instances kcalifra@ansi.org
2017-07-27

[All open](#) Tools Help

107 ballots found New Ballot

Type	Committee / Working Group	Reference	Vote	Start date	End date	Role
FDIS	ISO/IEC JTC 1/SC 31	ISO/IEC FDIS 18047-6 (Ed 2)		2017-05-31	2017-07-26	Commenter
DIS	ISO/TC 204	ISO/DIS 13184-3		2017-05-04	2017-07-26	Commenter
DIS	ISO/TC 204	ISO/DIS 16407-2		2017-05-04	2017-07-26	Commenter
DIS	ISO/TC 204	ISO/DIS 16410-2		2017-05-04	2017-07-26	Commenter
DTS	ISO/TC 204	ISO/DTS 17444-1.2		2017-05-05	2017-07-26	Commenter
DTS	ISO/TC 204	ISO/DTS 17444-2.2		2017-05-05	2017-07-26	Commenter
CIB	ISO/TC 8/SC 4	Terms Extension of WG7, WG9 and WG10 Convenors		2017-06-27	2017-07-27	Commenter
CIB	ISO/TC 110	ISO/TC 110 New chairperson of SC 1		2017-05-05	2017-07-28	Commenter
CIB	ISO/TC 104	Approval of ISO TC 104 liaison rep to ISO TC 111/SC 3	21 votes, 1 comment	2017-06-30	2017-07-30	Ballot owner
CIB	ISO/TC 122	Re-appointment of TC 122 WG convenors		2017-06-30	2017-07-31	Commenter
CD	ISO/TC 8	ISO/CD 11711-1 - revision		2017-06-06	2017-08-01	Commenter

To the right and the left of the highlighted red tab in the screen shot above, there are different tabs that will

sort your committee ballots. ANSI recommends that you click on the tab labeled “Search” which allows you to search for ballots with different filtering fields.

NOTE: You will only see the votes of the committees that you are assigned to in the ISO Global Directory. If you hold any ISO Secretariat roles, this will also mean that you can view the committee ballots for any committees you are in liaison with.

4. When you click on the “Search” tab, you will be able to search your ballots by type, status, title, committee, or start and end dates.

The screenshot shows the ISO ballot search interface. At the top, there is a navigation bar with several tabs: "All mandatory", "Vote required", "All open", "New last 2 weeks", "Closing in 2 weeks", "Closed last 2 weeks", and a red "Search" button. Below the tabs is a search form. It includes a "Type" dropdown menu, a "Reference or Title" text input field, a "Status" dropdown menu, a "Committee / Working Group" dropdown menu (currently showing "ISO/TC 104"), a "Start date" section with a radio button, a "from" text input, and a calendar icon, and an "End date" section with a radio button, a "to" text input, and a calendar icon. At the bottom of the form, it displays "83 ballots found" and a pagination control showing "<< < 1 - 20 > >>".

5. Once you generate the list of relevant ballots, you can click on the hyperlink of the ballot Reference name and if that ballot is still open, that hyperlink will take you to the ballot questions and potential answer. If the ballot is closed, the hyperlink will take you to the results of voting.

NOTE: Even though you can view your ballots as the U.S. TAG Secretary, please note that **you are not able to submit a vote**. The “HOW TO SUBMIT YOUR COMMITTEE VOTES” workflow on page 12 will outline how you successfully can submit your votes on the ISO balloting portal.

6. As the U.S. TAG Secretary, when you see a new ballot is launched, you should download the documents associated with that ballot, take note of the ballot questions and answers, and circulate it to your U.S. TAG members. You should set your internal U.S. TAG deadline.

NOTE: ANSI recommends that you set your internal U.S. TAG deadlines to allow plenty of time for comment collation, comment resolutions, and/or U.S. TAG conference calls if needed.

7. For any questions or issues with this process, feel free to email ISOT at ISOT@ansi.org.



HOW TO SUBMIT YOUR COMMITTEE VOTES

Purpose:

This workflow outlines how the U.S. TAG Secretary interfaces with ANSI's ISO Team to submit U.S. TAG consensus positions.

Relevant Terms:

- ANSI's ISO Team (ISOT)
- U.S. Technical Advisory Group (U.S. TAG)
- Committee Draft (CD)
- Committee Internal Ballot (CIB)
- Draft International Standard (DIS)
- Final Draft International Standard (FDIS)
- New Work Item Proposal (NWIP)
- Systematic Review (SR)
- [ISO Documents](#)
- [ISO Balloting Portal](#)

Forms:

1. NWIP ballot form
2. SR ballot form
3. ISO commenting template
4. [ISOT Guidance Note on ANSI's Voting Obligation in ISO](#)

Blank forms can be found on the [ANSI SharePoint site](#) in the folder labeled "Voting Resources." ISOT Guidance Notes can be found on the [ANSI SharePoint site](#) in the folder labeled "ISOT Guidance Notes".

Procedure:

1. The U.S. TAG Secretary is responsible for checking when their committee ballots are due and coordinating with all the U.S. TAG members to formulate a U.S. TAG consensus position by the international deadline.
2. The U.S. TAG Secretary can check on open ballots by logging into the [ISO Documents](#) site or can access the [ISO Balloting Portal](#). Please refer to the workflow in this document titled, “HOW TO ACCESS YOUR COMMITTEE BALLOTS” on page 10 for further instruction.
3. Once the U.S. TAG consensus position is finalized, the U.S. TAG Secretary will email ISOT@ansi.org with the U.S. TAG consensus position. ISOT submits all U.S. TAG consensus positions on the ISO balloting portal.

NOTE: Depending on the type of ballot the U.S. TAG Secretary is submitting, the required vote information will vary, as described below:

NWIPs and SRs have specific forms that need to be submitted by the U.S. TAG Secretary in order to be processed correctly. The U.S. TAG Secretary should email ISOT@ansi.org with these completed forms.

CD, DIS and FDIS ballots are always the same question and voting options. The U.S. TAG Secretary should email ISOT@ansi.org indicating how the U.S. would like to vote, and include a completed ISO commenting template if necessary.

All other ballots do not have specific forms and the questions and voting options vary ballot to ballot. In these cases, the U.S. TAG Secretary will need to access the ISO Balloting Portal to see the ballot questions and possible answers (as listed in number 2 above). An email from the U.S. TAG Secretary to ISOT@ansi.org indicating the U.S. consensus position (and comments if applicable) will suffice.

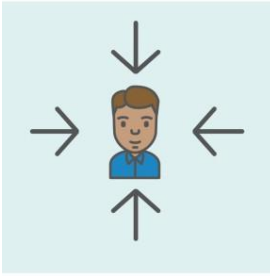
All comments are to be submitted to ISOT@ansi.org using the ISO commenting template in Word format. Other document formats (pdfs) are not accepted on the ISO balloting portal and only one ISO commenting template is accepted per ballot.

NOTE: ISOT’s Guidance Notes on [“ANSI’s Voting Obligation in ISO”](#) and [“Comments and the ISO Commenting Template”](#) provide great tips and information on voting timeframes and project management of vote processing as well as how to effectively use the ISO Commenting Template.

4. Once ISOT has submitted the U.S. position, the U.S. TAG Secretary will receive a confirmation email that the vote was processed.

NOTE: ISOT sends out automated reminders for ballots for which ANSI has not received a U.S. consensus position. These automated reminders are sent out on a weekly basis for votes due that week and also on a monthly basis for votes due the following month. Please follow up with ISOT if you receive a reminder for a vote that you have already submitted. This would indicate that perhaps ISOT did not receive the U.S. consensus position.

5. For any questions or issues with this process, feel free to email ISOT@ansi.org for assistance



HOW TO NOMINATE WORKING GROUP EXPERTS

Purpose:

This workflow outlines how the U.S. TAG Secretary interfaces with ANSI's ISO Team to nominate WG experts.

Relevant Terms:

- ANSI's ISO Team (ISOT)
- ISO Global Directory
- [ISO Documents](#)
- U.S. Technical Advisory Group (U.S. TAG)
- Working Groups (WG)

Forms: N/A

Procedure:

1. At the Working Group level, committee members are acting as individual experts and are not part of a country's delegation. ANSI gives U.S. experts direct access to WG committees and documents in the ISO Documents system. To nominate a WG expert, the U.S. TAG Secretary should email ISOT@ansi.org requesting that an individual(s) be added to a WG. In the email, the U.S. TAG Secretary should include the following information for each expert:

A. Which WG(s) the experts should be assigned to

B. The expert's name, salutation, organization, and stakeholder category. ISO's stakeholder categories and definitions are as follows:

- i. **Industry and Commerce** -manufacturers; producers; designers; service industries; distribution, warehousing and transport undertakings; retailers; insurers; banks and financial institutions; business and trade associations
- ii. **Government** - international and regional treaty organizations and agencies; national government and local government departments and agencies, and all bodies that have a legally recognized regulatory function

- iii. **Consumers** – national, regional and international consumer representation bodies, independent of any organization that would fall into the "industry and commerce" category or individual experts engaged from a consumer perspective
- iv. **Labor** – international, regional, national and local trades unions and federations of trades unions and similar bodies the main purpose of which is to promote or safeguard the collective interests of employees in respect of their relationship with their employers (this does not include professional associations)
- v. **Academic and Research Bodies** – universities and other higher educational bodies or professional educators associated with them; professional associations¹; research institutions
- vi. **Standards Application** – testing, certification and accreditation bodies; organizations primarily devoted to promoting or assessing the use of standards
- vii. **Non-governmental Organization (NGO)** – organizations that usually operate on a charitable, not-for-profit or non-profit distributing basis and that have a public interest objective related to social or environmental concerns. This category does not include political parties or other bodies whose main purpose is to achieve representation in government or governmental bodies.

NOTE: Only the U.S. TAG Secretary can nominate experts to be registered and those experts should be approved by the U.S. TAG. Should a third party email ISOT@ansi.org requesting registration, ISOT will correspond with the U.S. TAG Secretary before officially registering them in the ISO Global Directory.

NOTE: Only the expert's name, salutation, organization and stakeholder category are necessary for ISOT to register them into the ISO Global Directory. Experts can add or edit any other personal information in their account themselves at any time.

NOTE: Once an expert is registered in the ISO Global Directory, they will have access to all the documents posted in those WGs and can access them directly via the ISO Documents site and will be able to register themselves for WG meetings through the ISO Meeting Participant Platform.

NOTE: To remove an expert from a WG, simply email ISOT@ansi.org informing them which expert should be removed from the WG(s).

2. Once ISOT has added the experts to the appropriate WGs, they will send the U.S. TAG Secretary an email confirming this.
3. Should an expert forget their password for the ISO Documents site, they can reset it themselves by following the, "I forget my password" link on the login screen. If an expert continues to experience difficulties logging in, the expert can email ISOT@ansi.org for further assistance.
4. For any questions or issues with this process, feel free to email ISOT@ansi.org for assistance.



HOW TO ACCREDIT DELEGATES TO ISO MEETINGS

Purpose:

This workflow outlines how the U.S. TAG Secretary interfaces with ANSI's ISO Team to accredit U.S. delegates to attend ISO Committee meetings.

Relevant Terms:

- ANSI's ISO Team (ISOT)
- Head of Delegation (HoD)
- U.S. Technical Advisory Group (U.S. TAG)
- [ISO Meeting Platform](#)

Forms:

1. ANSI Delegate Accreditation Form
2. ANSI HoD Report

Blank forms can be found on the [ANSI SharePoint site](#) in the folder labeled "Meeting Resources."

Procedure:

1. To attend an ISO Committee meeting (TC, SC, PC or JTC) all U.S. delegates must be accredited by ANSI. To accredit U.S. delegates to attend an ISO Committee meeting, the U.S. TAG Secretary should email ISOT@ansi.org a completed ANSI Delegate Accreditation form one month prior to the meeting. In this form, the U.S. TAG Secretary should indicate who is serving as the HoD, as well as which meetings each delegate will be attending. The delegate accreditation form outlines all the information needed from each delegate to accurately register them.

NOTE: The U.S. TAG Secretary should not send these forms to the ISO Committee Secretary directly.

NOTE: If a TC is meeting in conjunction with a number of SCs, only one delegate accreditation form is needed. The U.S. TAG Secretary can utilize the appropriate column to indicate which meetings each delegate will be attending.

NOTE: The HoD is not a permanent position and should be approved for each meeting.

NOTE: If the U.S. TAG Secretary has not submitted a completed ANSI Delegate Accreditation form one month prior to the meeting, the U.S. TAG Secretary will receive a reminder email from ANSI requesting that they do so.

NOTE: For WG meetings, experts should register for the meeting directly on the [ISO Meeting Platform](#). So long as they are registered to the WG in the ISO Global Directory, they will be able to register themselves on the site. (For how to register WG experts to a WG, please see the “HOW TO NOMINATE WORKING GROUP EXPERTS” workflow on page 15).

2. ANSI will confirm with the U.S. TAG Secretary the submittal of the completed ANSI Delegate Accreditation form, and will send all accredited delegates relevant information for the meeting.
3. As soon as possible when the meeting is over, the U.S. TAG Secretary or HoD should email ISOT@ansi.org a copy of a completed HoD report, which should have been filled out by the HoD. ANSI will accept the report if it is submitted directly by the HoD that was indicated on the ANSI Delegate Accreditation form.

NOTE: We encourage our U.S. TAG Secretaries and HoDs to keep these Head of Delegation reports, and any potential issues, internal with ANSI until ANSI has had the time to investigate any problematic situations that may have arisen. When afforded this opportunity, ANSI can resolve many of the issues and provide guidance without involving the broader international community. With this in mind, please do not copy any international persons on email when submitting the HoD report.

4. Should there have been any issues at the meeting outlined in the HoD report, ISOT will investigate them and follow up with the U.S. TAG Secretary as needed.
5. For any questions or issues with this process, feel free to email ISOT@ansi.org for assistance



HOW TO OFFER TO HOST ISO MEETINGS IN THE U.S.

Purpose:

This workflow outlines how the U.S. TAG Secretary interfaces with ANSI's ISO team to host an ISO meeting in the U.S.

Relevant Terms:

- ANSI's ISO Team (ISOT)
- U.S. Technical Advisory Group (U.S. TAG)
- Working Groups (WG)

Forms:

1. Delegate Information needed for VISA Invitation Letters
2. ISOT Guidance Note on Hosting a Meeting in the U.S.

Blank forms can be found on the [ANSI SharePoint site](#) in the folder labeled "Meeting Resources." ISOT Guidance Notes can be found on the [ANSI SharePoint site](#) in the folder labeled "ISOT Guidance Notes."

Procedure:

1. **According to the ISO directives, any ISO Committee meeting location must be announced at least 4 months before the meeting is set to take place.** ANSI as the official U.S. member body to ISO must be the organization to issue the official meeting invite for any ISO Committee meeting in the U.S. When the U.S. TAG has decided to offer to host an ISO committee meeting in the U.S., the U.S. TAG Secretary should send an email to ISOT@ansi.org including the following information:
 - A. **Meeting Host/Financial sponsor of meeting**
 - B. **Written notification that the U.S. TAG membership will be responsible for covering all costs of the meeting**
 - C. **A meeting coordinator/point of contact and their name, organization, address, phone number and email address.**
 - D. **Dates of the ISO Committee meeting (s)**
 - E. **Location of the ISO Committee meeting (s)**

NOTE: The meeting host/sponsor must confirm that there are no restrictions on access to the meeting rooms which could impede or prevent the participation of any delegate at this meeting

NOTE: The U.S. delegation can tentatively offer to host an ISO Committee meeting in the U.S. while at an ISO meeting, but the U.S. TAG must follow up with ANSI as soon as possible with the information listed above so ANSI can issue the official invite.

2. Once the U.S. TAG Secretary provides the information listed above, ANSI will issue the official invite.
3. According to ISO directives, WG meetings require the location to be announced at least 6 weeks before the meeting is set to take place. For WG meetings taking place in the U.S., the U.S. TAG Secretary can simply inform ISOT by emailing ISOT@ansi.org with the dates and location of the WG meeting(s).
4. ANSI will write letters of invitation for foreign delegates who require them for VISA purposes. To have these letters written, each delegate must fill out the “Delegate Information needed for VISA Invitation Letters” form. These completed forms should be emailed to ISOT@ansi.org so ISOT can work with the U.S. TAG Secretary and/or ISO Secretary to write and issue these letters of invitation.

NOTE: ANSI provides this form and information to the Secretary of the ISO Committee when ANSI writes the official offer to host the meeting.

NOTE: The VISA process in certain countries can take up to 4-5 months and outside of writing the letters of invitation, ANSI has no influence in the pace of VISA processing by U.S. embassies. We can only stress that it is important to start this process as early as possible.

NOTE: ISOT’s Guidance Note on [“Hosting a Meeting in the U.S.”](#) provides great tips and information on things to consider when hosting an ISO meeting.

5. For any questions or issues with this process, feel free to email ISOT@ansi.org for assistance.



HOW TO SUBMIT U.S. NEW WORK ITEM PROPOSALS (NWIPS)

Purpose:

This workflow outlines how the U.S. TAG Secretary interfaces with ANSI's ISO Team to submit a U.S. New Work Item Proposal to circulate for vote by other ISO national member bodies.

NOTE: This workflow does not apply to NWIPs that are already out to vote in an ISO committee. For that workflow, please reference "HOW TO SUBMIT YOUR COMMITTEE VOTES," on page 12.

Relevant Terms:

- ANSI's ISO Team
- U.S. Technical Advisory Group (U.S. TAG)
- New Work Item Proposal (NWIP)
- Management System Standard (MSS)

Forms:

1. Form 4
2. Guide 72 Justification Study
3. ISO/IEC Directives, Part 1 — Consolidated ISO Supplement — Procedures specific to ISO

A copy of Form 4 can be found on the ISO site [here](#). The Form 4 contains a link to the Guide 72 Justification Study if needed. The ISO/IEC Consolidated ISO Supplement can be found on the [ANSI SharePoint site](#) in the folder labeled "ANSI and ISO Procedures."

Procedure:

1. The ISO Directives indicate that the proposer of an NWIP should discuss the proposal with the committee leadership. U.S. TAG Secretaries should take this step as early as possible, as consultation with the committee leadership will help in deciding an appropriate development track and draft project plan, which includes key project milestones. ISOT can help facilitate this discussion.
2. Once the committee leadership has been consulted, the U.S. TAG Secretary shall email ISOT@ansi.org a completed Form 4 and all necessary Annexes. Form 4 is the ISO form that is required by ISO for the NWIP to be circulated.

NOTE: As the official U.S. member body to ISO, ANSI should be listed as the proposer on the U.S. NWIP. The listed proposer should not be any organization other than ANSI.

NOTE: If the NWIP is for a Management System Standard (MSS), the U.S. TAG must have completed and submitted the Guide 72 Justification Study. Guidance on the Guide 72 Justification Study can be found in the ISO/IEC Consolidated ISO Supplement.

3. Once the U.S. TAG Secretary submits all the necessary materials to ISOT@ansi.org, ISOT will send the materials to the ISO Committee Manager while copying the U.S. TAG Secretary to acknowledge submittal.



HOW TO REQUEST PUBLISHED STANDARDS

Purpose:

This workflow outlines how the U.S. TAG Secretary interfaces with ANSI's ISO team to request published ISO standards.

Relevant Terms:

- ANSI's ISO Team (ISOT)
- U.S. Technical Advisory Group (U.S. TAG)

Forms: N/A

Procedure:

1. Should the U.S. TAG Secretary need a copy of a published ISO standard, the U.S. TAG Secretary should email ISOT@ansi.org indicating which standard they require.

NOTE: If the U.S. TAG Secretary is requesting a standard within their ISO committee:

- a. For systematic review, they can access the standards through the [ISO Balloting Portal](#).
- b. For other standards development activities, the U.S. TAG Secretary will be able to receive a copy of their related ISO Committee's standards free of charge.

NOTE: If the U.S. TAG Secretary is requesting a standard from other committees because they may need to be used as normative references, the U.S. TAG Secretary will be able to receive a copy free of charge from ISOT.

NOTE: U.S. TAG Secretaries should note that for any published standards received from ISOT, "Permission is granted by the American National Standards Institute to reproduce this International Standard for the purpose of review and comment related to the preparation of a U.S. position, provided this notice is included. All other rights are reserved."

2. ISOT will send the U.S. TAG Secretary the requested published standard should it be appropriate as outlined above. For requests that do not fit into the criteria above, ISOT will direct the U.S. TAG Secretary to [ANSI's Standards Connect portal](#) where all standards are available for purchase.

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