



# Standards and Certification Training

## Module A – Administrative A1. Tools and Resources



## REVISIONS

<u>Date</u>	<u>Change</u>
08/18/21	Presentation was completely overhauled to include updates based on ASME's current tools and resources.
04/08/14	Updated format.
11/22/10	Changed "Codes and Standards Board of Directors" to "Council on Standards and Certification" throughout.

# MODULE A COURSE OUTLINE

## **A1. Tools and Resources**

A2. Standards and Certification Products

A3. Membership Maintenance

A4. Honors and Awards

A5. Publishing Codes and Standards

A6. Productive Meetings and Appropriate Ballot Comments

Module A contains six modules. This is Module A1, Tools and Resources.

## LEARNING OBJECTIVES

This module describes Codes and Standards tools and resources that are available

This module describes the tools and resources available for Codes and Standards.

## ASME S&C COMMITTEES

The Standards & Certification (S&C) website\* offers many resources that aids both new interested parties as well as current volunteer members to learn more about:

- Membership Criteria including types of committee membership
- How to get involved in an S&C Committee
- Training on ASME's electronic tool, C&S Connect
- Other resources

\*See <https://www.asme.org/codes-standards/asma-code-committee/get-involved/join-a-c-s-committee>

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## ASME C&S POLICIES, PROCEDURES, AND GUIDES

The Codes & Standards (C&S) website\* is an excellent resource for information regarding C&S. On this website, you will find detailed information regarding our:

- Policies
- Procedures
- Guides
- Other Resources

\*See <https://cstools.asme.org/csconnect/CommitteePages.cfm?Committee=A01000000&Action=7609>

The Codes & Standards (C&S) website\* is an excellent resource for information regarding C&S. On this website, you will find detailed information regarding our Policies, Procedures, Guides and other Resources.

# POLICIES

- Codes & Standards Policies (CSPs)
  - The ASME's CSPs are operating policies that are applicable to the operation of Standards and Certification Committees and is approved by the ASME Council on Standards and Certification
- ASME Constitution and By-Laws
  - The ASME Constitution is a body of fundamental principles. Changes can only be approved by vote of the ASME Society Membership.
  - The ASME By-Laws contain rules regarding the organization and conduct of the ASME Society. They are approved by the Board of Governors.
- ASME Society Policies
  - Documents that set forth the rules and procedures relating to some particular aspect(s) of the ASME Organization and operation
  - Approved by the Board of Governors

## Codes and Standards Policies (CSPs):

- The ASME CSPs are operating policies that is applicable to the operation of Standards and Certification Committees.
- There are over 50 CSPs that have been approved by the Council on Standards and Certification

## ASME Constitution and By-Law:

- The ASME Constitution is a body of fundamental principles that can only be changed by vote of the ASME Society Membership.
- The ASME By-Laws contain rules regarding the organization and conduct of the ASME Society and are approved by the Board of Governors.

## ASME Society Policies:

- Documents that set forth the rules and procedures, consistent with the constitution and By-Laws, relating to some particular aspect(s) of the ASME Organization and operation
- There are over 75 Society Polices that have been approved by the Board of Governors.

## OPERATING PROCEDURES

- Contain requirements and guidance for use by ASME standards development committees to organize, staff, and administer their activities associated with the development and maintenance of ASME C&S
- Developed in order to comply with ANSI Essential Requirements
- Approved by
  - ASME Council on Standards and Certification or their designee
  - ANSI Executive Standards Council (ExSC)

The Operating Procedures for ASME Codes & Standards Development Committee contain requirements and guidance for use by ASME standards development committees to organize, staff, and administer their activities associated with the development and maintenance of ASME Codes and Standards.

They were developed in order to comply with the ANSI Essential Requirements. They may also be referred to as the ANSI Accredited Procedures. These procedures are approved by the ANSI Executive Standards Council (ExSC). Amendments to these procedures can be proposed at any time and require the approval of the Council on Standards and Certification or their designee. Any amendments to these procedures will be submitted to ANSI for acceptance in accordance with their criteria for acceptance of revisions to the accredited procedures.



## OTHER PROCEDURES

The following procedures are not included in the operating procedures:

- Procedures for Development of ASME Technical Reports
  - Describes the approval criteria for developing a Technical Report
  - Approved by Board on Council Operations (BCO) & ANSI Executive Standards Council
- Operating Procedures for ASME Administered U.S. Technical Advisory Groups (TAG) for ISO Activities
  - Describes the committee operation (e.g., U.S. TAG Committee Charter, Functions & Responsibilities & Communication)
  - Approved by the parent committee. In most cases, the parent committee is the consensus committee

The following procedures are not included in the operating procedures; ASME Technical Reports, Operation Procedures for ASME Administered U.S. Technical Advisory Groups (TAG) for ISO Activities & Joint Committee Procedures.

ASME Technical Reports are informational in nature and may contain reports of technical research, tutorials, and factual data. The procedures for ASME Technical Reports describe the approval criteria for development such reports. These procedures are approved by the Board on Council Operations & ANSI Executive Standards Council.

Operating Procedures for ASME Administered U.S. Technical Advisory Groups (TAG) for ISO Activities describes the committee operation such as U.S. TAG Committee Charter, Functions & Responsibilities & Communication. The procedures are approved by the parent committee which in most cases, the parent committee is the consensus committee.

## OTHER PROCEDURES

- Joint Committees Procedures
  - Created when ASME and another Standards Development Organization (SDO) collaborate to create and maintain a joint standard
  - Describe the committee operation such as their Charter and Organization
  - Approved by the ASME Consensus Committee, its Supervisory board and the applicable joint SDO

Joint Committees and their procedures are created when ASME and another Standards Development Organization (SDO) collaborate to create and maintain a joint standard. These procedures describe the committee operation such as their Charter and Organization. The procedures are approved by the ASME Consensus Committee, its Supervisory board and the applicable joint SDO.

## GUIDES AND FORMS

- Guidelines for Agendas & Minutes
  - Provides uniform guidance for preparation of meeting agendas, minutes and their contents
  - Agendas are typically distributed to members of the committee 4 weeks prior to the meeting and are available on the applicable C&S Connect Committee page
    - Upon request to the Staff Secretary, Agendas can be shared with individuals who are not members of any ASME Standard Development Committees
  - Minutes are typically distributed 4 weeks following the meeting to members of the committee **ONLY**

**NOTE:** C&S Connect is a web application that ASME uses to manage the standards development process.

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Agendas are typically distributed to members of the committee 4 weeks prior to the meeting and are available on the applicable C&S Connect Committee page. Upon request to the Staff Secretary, Agendas can be shared with individuals who are not members of any ASME Standard Development Committees.

Minutes are typically distributed 4 weeks following the meeting to members of the committee only.

Guidelines for volunteers and staff:

- Preparation of electronic manuscripts
- Volunteer review of manuscripts and proofs

Forms for use by C&S members and staff:

- Personnel Form that is downloadable, which must be completed by volunteers upon appointment to a committee
- Project Initiation Form and instructions for its use

## GUIDES AND FORMS

- Request for the Development of a new ASME Standards Activity Form
  - A form used to request the development of a new ASME Standards Activity such as a Standard, Technical Report or guide
- Membership Application Form
  - An application used for requesting membership on an ASME Standards Development Committee. This form can be found on the following page: <https://www.asme.org/codes-standards/asme-code-committee/get-involved/join-a-c-s-committee>

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The membership Application Form is an application used for requesting membership on an ASME Standards Development Committee.

## C&S ELECTRONIC TOOL

- C&S Connect is a web application that ASME uses to manage the standards development process
  - Developed to support our Operating Procedures for ASME Codes & Standards Development Committee
  - Access granted upon committee appointment
  - Allows committee members to manage proposals such as revisions to standards
  - Provides notifications to users when an action needs to be taken such as voting on a proposed revision to a ASME Standard
  - Provides access to committee documents such as meeting minutes & agendas and information about upcoming committee meetings

C&S Connect is a web application that ASME uses to manage the standards development process. This application was developed in accordance with the ANSI Accredited Procedures. Access is granted upon initial committee appointment and is currently used by approximately 6,000 volunteers and staff.

C&S Connect allows committee members to track and update proposals such as revisions to standards. Each proposal is given a record number for tracking purposes. When a proposed revision is ready for committee review, C&S Connect is used by committee members to cast and track votes.

In addition to tracking proposals and votes, C&S Connect allows members to access important committee documents such as minutes and agendas for meetings. Upcoming meeting information may also be found on the appropriate Committee web page.

## C&S ELECTRONIC TOOL

- Public Review Drafts
  - Complete listing of all ASME Codes & Standards proposals currently out for public review
  - Boiler & Pressure Vessel Code Case Review
- Code Case Database
  - A database for the users of the BPVC that allows an individual to download and print official copies of Code Cases that have been approved and printed in a Supplement. These code cases are available for two months following the issuance of the supplement.
  - Non-BPVC Cases are available on the applicable committee page on C&S Connect
- Interpretation Database
  - A database that contains committee approved interpretations issued for ASME codes and standards
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### Interpretation Database

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## MODULE SUMMARY

- S&C offers many resources that aid both new interested parties as well as current volunteer members to learn more about:
  - Membership Criteria including types of committee membership
  - How to get involved in an S&C Committee
  - Training on ASME's electronic tool, C&S Connect
- The C&S Electronic tool is vital in ensuring due process in our standards development process

## REFERENCES

- Standards & Certification Webpage
  - <https://www.asme.org/codes-standards/asma-code-committee/get-involved>
- Codes & Standard (C&S) Connect Page:
  - <https://cstools.asme.org>
- C&S Policies, Procedures & Guides
  - <https://cstools.asme.org/csconnect/CommitteePages.cfm?Committee=A01000000&Action=7609>
- Join an S&C Committee
  - <https://www.asme.org/codes-standards/asma-code-committee/get-involved/join-a-c-s-committee>