



# **A guide to completion of assessor profile through INAB CRM Portal**

**(Extract from chapter 1 and 3 of CRM1 – INAB Assessor User Guide)**

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# 1. Login

Supported software versions

Web Browser: Google Chrome, Mozilla Firefox, Internet Explorer IE8+

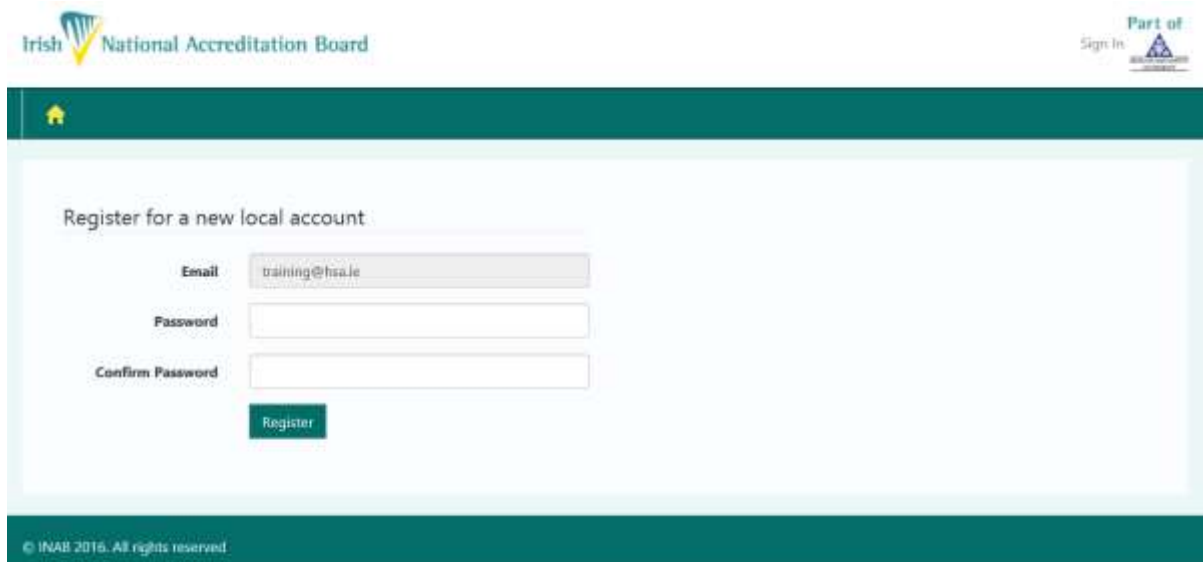
Microsoft Excel: MS Excel 2010, 2013

## 1.1.Set up Portal password

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An email will be sent with a URL to set up a password for the Portal.

Click on the link in the email which will open a page which has the email pre populated:



You must enter in your new password for the Portal twice, they must match and meet the following criteria:

- Passwords must be at least 8 characters
- Passwords must contain at least one symbol e.g. '!', '£', '#', '%', '&', '\$', '@')
- Passwords must have at least one uppercase ('A'-'Z')

Click on Register, if you have not entered in a password the system accepts you will be given a warning.

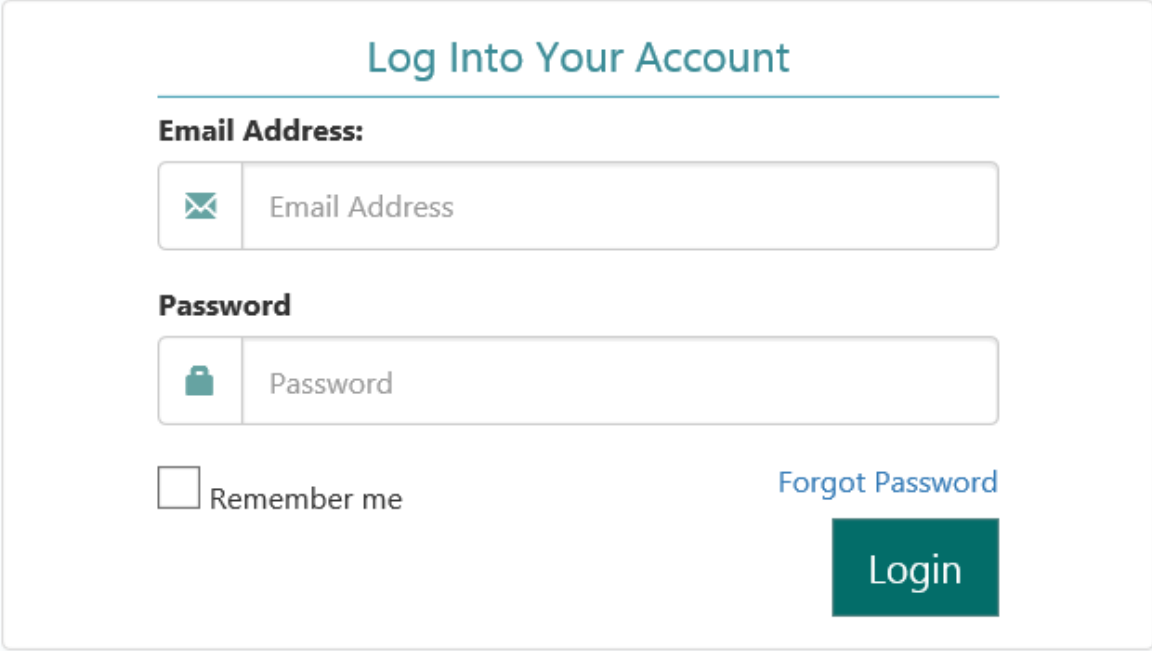
INAB will never know your password.

When you register you will not be able to do anything on the site until the Assessor profile is set up. See section 2.

## 1.2. Login

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When you click on the Portal Login link you will see this page:



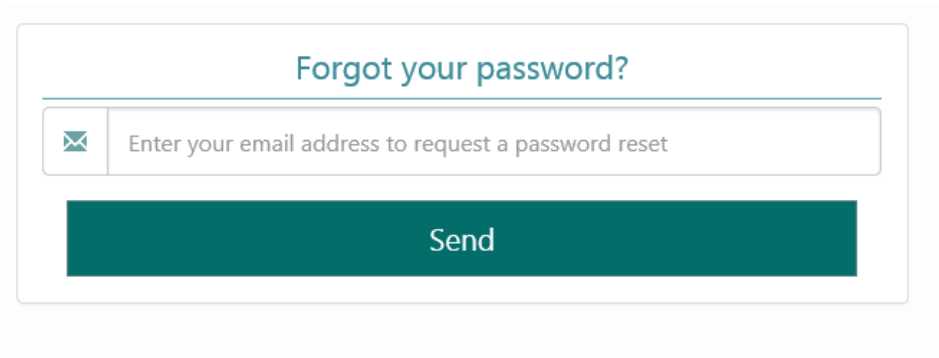
The screenshot shows a login form titled "Log Into Your Account". It features two input fields: "Email Address" with an envelope icon and "Password" with a lock icon. Below the password field is a "Remember me" checkbox and a "Forgot Password" link. A dark teal "Login" button is positioned at the bottom right of the form.

Use the email address and password you registered with. This will open up the homepage which is covered in section **Error! Reference source not found.**

## 1.3. Forgot my password

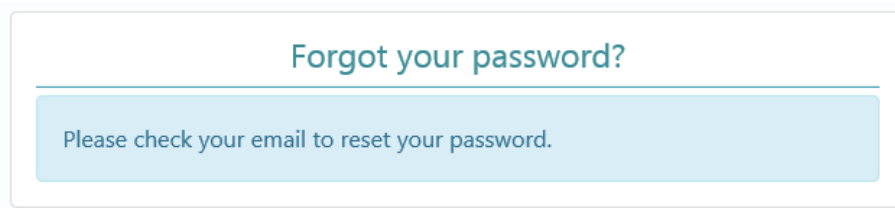
---

If you forget your password click on the Forgot Password on the login page:



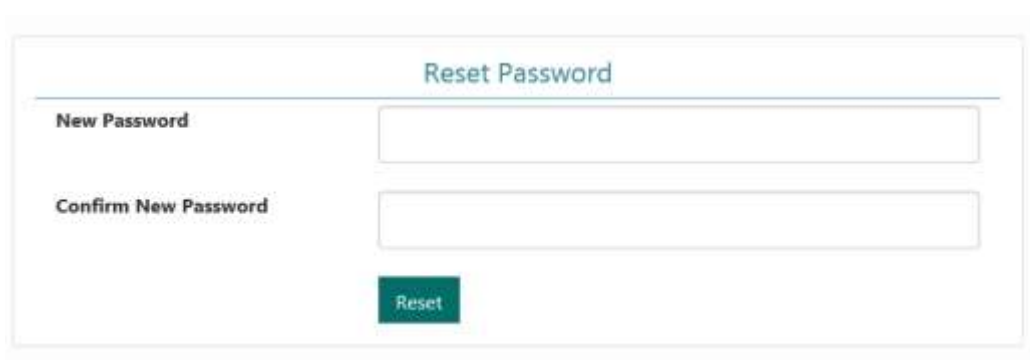
The screenshot shows a form titled "Forgot your password?". It features a text input field with a placeholder "Enter your email address to request a password reset" and a dark teal "Send" button below it.

When you enter your email and press send you are informed:



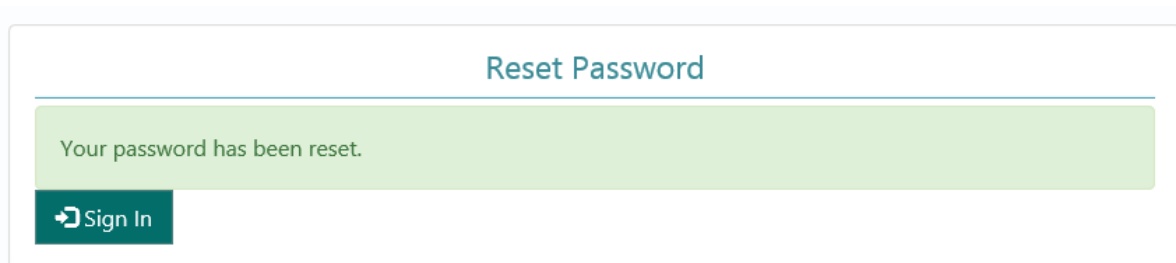
The screenshot shows a confirmation message box titled "Forgot your password?". The message reads: "Please check your email to reset your password."

You will receive an email with a link to reset your password which when clicked will show you:



The screenshot shows a form titled "Reset Password". It contains two text input fields: "New Password" and "Confirm New Password". Below the fields is a dark teal "Reset" button.

When a correct password is entered the message will show:



The screenshot shows a confirmation message box titled "Reset Password". The message reads: "Your password has been reset." Below the message is a dark teal "Sign In" button with a right-pointing arrow icon.

## 1.4. Account locked

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If you enter your password incorrectly three times you will see the following message and you will be locked out of the portal for five minutes:

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### Log Into Your Account

- The user account is currently locked. Please try again later.

**Email Address:**

	training@hsa.ie
---	-----------------

**Password**

	Password
---	----------

Remember me

[Forgot Password](#)

Login

## 1.5. Logout

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In the header navigation when you are logged in the Logout is accessible via a link:



If there is no activity on the Portal for 15 minutes, a warning message will appear and stay on the screen for 15 minutes before the expiry time of the page.

If you click 'Continue' within these 15 minutes the page will reactivate. If not, after another 15 minutes you will be informed that the page has expired and will be redirected to enter your login details again.



## 1.6. Supported software

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### Supported software versions

Web Browser: Google Chrome, Mozilla Firefox, Internet Explorer IE8+

Microsoft Excel: MS Excel 2010, 2013

The INAB CRM and Portal systems are only developed and tested for Windows systems.

Third party support will not proceed with an investigation to confirm whether it works within the Windows system, and if the issue is isolated to MAC.


IT support advises that users try the same steps on a Windows machine before logging a call

## 2. Create Assessor Profile

## 2.1. Assessor profile

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Until your profile is completed you will see this message:

 Your profile is not complete. [Click here to complete your profile](#)

Your application will not be reviewed by INAB until your profile has been completed. After the profile is reviewed you will be approved as a Technical Expert or Technical Assessor and a contract will be drawn up.

When this is counter-signed and returned to INAB you will then be approved to attend assessments on behalf of INAB.

To begin the process, click on complete profile to go to the profile wizard.

### **Note:**



You have the option to 'Save and proceed to next step' on each page when filling out your details. But you can also 'Save and go back' if you have forgotten some details on previous pages. This will allow you to move back and forward during your application process and avoid having to re-enter details while doing so.

## 2.2. General assessor information

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Enter your name, address, and contact details.

All items with an \* must be completed before proceeding to the next step.

### Create Profile

#### Step 1 of 8 - General

<b>Title*</b>	<input type="text" value="Select your title"/>
<b>First name*</b>	<input type="text" value="PK"/>
<b>Last name*</b>	<input type="text" value="TestOct20"/>
<b>Address*</b>	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
<b>Country*</b>	<input type="text" value="Select your country"/>
<b>County</b>	<input type="text"/>
<b>Postcode/Eircode</b>	<input type="text"/>
<b>Telephone*</b>	<input type="text"/>
<b>Mobile*</b>	<input type="text"/>

## 2.3. Current employment status and experience

Please enter your current employment status, your normal place of work, any experience of previous work with other Accreditation Bodies (ABs).

If you have worked with and INAB accredited CAB provide details.

Finally give a brief summary of relevant work experience to date.

### Create Profile

#### Step 2 of 8 - Add Current Status and Work Experience

Position held in current employment*	<input type="text"/>
Number of years in this position*	<input type="text"/>
Are you actively working with another accreditation body (AB)?*	<input type="text" value="No"/>
If you answered yes to the above, please document the AB, the number of assessments in the last 12 months and your role in those assessments.	<input type="text"/>
Have you worked with any INAB accredited CAB? If yes, provide detail including CAB name, role and duration of work*	<input type="text"/>
Summarise relevant work experience to support the assessment role. Include the number of years you worked in relevant areas.*	<input type="text"/>

[← Save and go back](#) [Save and proceed to next step >](#)

As per ISO 17011, INAB is obliged to inform its conformity assessment bodies of the names of assessment team members, and also the organisations that the team members belong to. The information in the 'Company Name' field, this information does not always reflect the 'organisation that you belong to' – you might have a company name set up for your assessor activities, but you might also have full-time/part time employment with, for example, a university, a hospital, a laboratory, etc.

The details that you enter in the 'Company Name' field are not shared with the CAB, but if you are on an assessment team, whatever is entered in the new 'Normal place of employment' field will be visible to the CAB whenever it logs into its portal for that particular assessment.

The image shows a portion of a web form. It contains three input fields, each with a label and a red asterisk indicating it is required:

- Telephone\***: A text input field.
- Mobile\***: A text input field.
- Normal place of employment\***: A text input field.

Below these fields is a section titled **Please note:** with the following bullet points:

- If you have retired – enter Retired.
- If assessment or consultancy is your main employment – enter the name of your company.
- If you have a contract of employment with multiple organisations (eg hospitals) – enter the name of each organisation

At the bottom of the note section, there is a disclaimer: (Note: this information will be shared with any CABs for which you are assessor and with the other INAB assessors assigned to the event, as required by ISO 17011:2017)

## 2.4. Contract and financial matters

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You will be contracted to the Health and Safety Authority to provide professional services to INAB.

INAB contracts external technical assessors on a day rate basis. Once you are activated on our system INAB will pay an agreed rate for each assessment undertaken.

Assessors may be either self-employed or working through a limited company. The level of work is demand-led, and as a result INAB cannot guarantee specific a specific number of assessments annually.

If you wish to be paid through a company, enter the company name when prompted.

When contract with on an individual or company basis, a valid tax clearance certificate is required annually for the individual/company under contract.

Add your Daily Rate, preferred currency and VAT number, if registered to pay VAT in Ireland.

### Step 3 of 8 - Contract & Financial Matters

Please note that the assessors are contracted to the Health and Safety Authority to provide professional services to INAB. The Terms and Conditions of Business are on the INAB website. A valid tax clearance certificate is required annually for the individual/company under contract.

Do you wish to be contracted to INAB:*	Select an option ▼
Company name	<input type="text"/>
Daily rate (8 hour basis)*	<input type="text"/>
Specify currency (please note INAB pays all invoices in Euro)*	Select an option ▼
Are you registered to pay VAT in Ireland?*	No ▼
VAT number	<input type="text"/>

◀ Save and go back

Save and proceed to next step ▶

## 2.5. Add qualifications and training

See CRM8 'INAB Portal User Guide for New Assessors' for more detailed instructions. On the next step you must add one qualification at a minimum.

### Step 4 of 8 - Add Qualifications

#### Educational qualifications and training in an accreditation standard + Add qualification

Please note you will be required to upload certificate or evidence of qualification. Professional memberships can be entered on the next page.

No records found.

Qualification Type	Qualification Name	Institute Name	Year Awarded	Year Expired
--------------------	--------------------	----------------	--------------	--------------

< Save and go back Save and proceed to next step >

Click on Add qualification and complete all the mandatory fields. Evidence of qualification (eg certificate) should be uploaded at this point. If it is a large document this may take longer to process.

#### Add Qualification

Qualification Type\*

Qualification Name\*

Institute Name\*

Year Awarded\*

Year of expiry (if applicable)

Certificate\*

Cancel Save Qualification



## 2.6. Membership of professional body

If you are a member of any professional organisations then click on 'Add Membership' and fill in the details.

This section is optional.

### Step 5 of 8 - Member of Professional Body (Optional)

#### My Memberships

+ Add membership

No records found.

Membership Name	Year of Membership	Year Expired
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Go back Save and proceed to next step

#### Add Membership

Membership Name\*

Year Joined\*

Year Expired

Cancel Save Membership

## 2.7. Expert/Assessor expertise

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Enter any experience or training you have had in being a Lead Assessor (eg for another Accreditation Body). Upload documentary evidence.

Enter any experience or training you have had in being a Technical Assessor/Technical Expert (eg for another Accreditation Body)

Finally add any other quality management training and experience (eg internal auditor training, company quality/technical manager).

### Step 6 of 8 - Expert/Assessor Expertise

Lead assessor experience	<input type="text"/>
Lead assessor training (mandatory to add a document)	<input type="text"/>
Upload documentary evidence	<input type="button" value="Choose Files"/> No file chosen <input type="button" value="Upload"/>
Technical assessor experience (include number of assessments in the last 12 months)	<input type="text"/>
Other quality management experience (include number of years)	<input type="text"/>
Other quality management training	<input type="text"/>

Section	What information are we looking for?  <i>Insert Not Applicable if appropriate</i>
<b>Accreditation Standard(s) selection</b>	<ul style="list-style-type: none"> <li>• Select relevant standard you are applying to assess to</li> <li>• This should be supported by your training and experience.</li> <li>• Tick the box(s) that apply from the drop down menu. (*see screen shot above).</li> </ul>
<b>Lead Assessor Experience:</b>	Outline your Lead Assessor experience and training <ul style="list-style-type: none"> <li>• Type of assessments</li> <li>• accreditation standard</li> <li>• accreditation body</li> <li>• Outline number of assessments fulfilled as lead assessor (eg 12 assessments in 2019 as LA in ISO 17025)</li> </ul>
<b>Lead assessor Training:</b>	<ul style="list-style-type: none"> <li>• Outline the training you have received and the training provider</li> <li>• e.g ISO 15189 lead assessor course/ other source(s).</li> </ul>
<b>Upload documentary evidence</b>	<ul style="list-style-type: none"> <li>• Upload your documents/certificates to support your lead assessor and technical assessor training and experience.</li> <li>• Click on “Choose files” to source the required electronic documents.</li> <li>• Choose upload to attach to your application.</li> </ul>
<b>Technical Assessor Experience</b>	Outline your Technical Assessor/Technical Expert experience and training <ul style="list-style-type: none"> <li>• Type of assessments</li> <li>• accreditation standard</li> <li>• accreditation body</li> <li>• Outline number of assessments fulfilled as technical assessor or technical expert (eg 12 assessments in 2019 as TA in ISO 17025 – Chemistry)</li> </ul> Submit evidence in Upload Documentary Evidence
<b>Other Quality Management experience (Include number of years)</b>	This can include any experience of managing or working in an accredited organisation
<b>Other Quality Management training (include number of years)</b>	This can include any QMS training received which is relevant to your application

## 2.8. Technical expertise

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Complete all areas in which you have technical competency, whether through training or experience.

If competency is maintained through assessment experience enter the number of assessments in the last 12 months and what the role was.

If it was by consultancy you must enter in what the consultancy experience was.

1. On the drop down menu select the Standard
2. Scroll across to select Sub-scope
3. Tick each in which you have technical competency, whether through experience or training.
4. Add a comment to justify your competence and upload a document as evidence of this competency (eg training certificate, CV).
5. Select your sub scopes level 1's and 2's by ticking the boxes beside each one

You can either select all or individually. Use the search to help find sub-scopes.

Click on the blue text to display the level 2 classifications which are included in each level 1

These subscope elements match those on CAB scopes of accreditation. For a full list please see the STxxCRM (1-24) documents on INAB website.

6. Click on Save Expertise when complete. The Save Expertise will not be available for selection until you have entered a comment into the Justification box.

**1** Select Standard

**2** Test Acoustic & Vibration Testing Biological and Veterinary Testing Chemical Testing Construction Materials Testing Electrical Testing Forensic

Sub-scope expertise supported by\*

Training **3**

Experience **4**

Justification (limited to 2000 characters; please use the 'choose files' feature below to upload CV, certificates, or other documentary evidence)\*

Choose Files No file chosen Upload

Please select the expertise fields for which you have supporting evidence. Please consult the INAB website for the latest version of CRM Classification codes to help select the relevant Subscopes.

Search:  Save Expertise **6**

Sub-Scope Level 1	Sub-Scope Level 2	Approval Status
<input type="checkbox"/> .01 Electromagnetic compatibility	<input type="checkbox"/> .01 Emission testing	Not Approved
	<input type="checkbox"/> .02 Immunity testing	Not Approved
	<input type="checkbox"/> .03 Magnetic field emissions	Not Approved

**5**

You will see a success message on screen after you have saved your Expertise.

Approval status will change from Not Approved to Submitted

Successfully saved. Expertise has been submitted to INAB for review.

Select Standard ISO 17025 T

Test Acoustic & Vibration Testing Biological and Veterinary Testing Chemical Testing Construction Materials Testing Electrical Testing Forensic

Sub-scope expertise supported by\*

Training

Experience

Justification (limited to 2000 characters; please use the 'choose files' feature below to upload CV, certificates, or other documentary evidence)\*

both training and experience obtained in standard. See attached documentation.

No file chosen

Please select the expertise fields for which you have supporting evidence. Please consult the INAB website for the latest version of CRM Classification codes to help select the relevant Subscopes.

Search:

Sub-Scope Level 1	Sub-Scope Level 2	Approval Status
<input checked="" type="checkbox"/> <a href="#">301 Electromagnetic compatibility</a>		
	<input checked="" type="checkbox"/> .01 Emission testing	Submitted
	<input checked="" type="checkbox"/> .02 Immunity testing	Submitted
	<input checked="" type="checkbox"/> .03 Magnetic field emissions	Submitted
	<input checked="" type="checkbox"/> .99 Other	Submitted
<input type="checkbox"/> <a href="#">302 Approval &amp; performance tests</a>		
	<input checked="" type="checkbox"/> .01 Radio communications equipment	Submitted
	<input checked="" type="checkbox"/> .02 Electrical appliances and accessories	Submitted
	<input type="checkbox"/> .03 Telecommunications equipment	Not Approved
	<input checked="" type="checkbox"/> .99 Other	Submitted

Click on Save and proceed to next step to complete the final step of your application

<input checked="" type="checkbox"/> .99 Other tests	Submitted
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**Technical competence criteria must be defined in full against the following documents:**

**Testing and Calibration Laboratories:** CRM code classifications (www.inab.ie) – incorporated in the dropdown menus of the application.

**Inspection Bodies:** CRM code classifications – incorporated in the dropdown menus of the application.

**Certification Body Activities:** IAF and NACE codes – incorporated in the dropdown menus of the application.

[http://ec.europa.eu/comm/competition/mergers/cases/index/nace\\_all.html](http://ec.europa.eu/comm/competition/mergers/cases/index/nace_all.html)

and [www.iaf.nu](http://www.iaf.nu)

**For Product Certification of:**

1. Food, please refer to Sector Schemes (e.g. BRC Food, BRC Packaging, GlobalGAP etc.)
2. Organic products, please ensure competence criteria in EA-3/12 are met.

For certification of persons please refer to specific schemes

## 2.9. Information confirmation and verification

This is the final step of your application – the Information Confirmation and Verification step.

**Step 8 of 8 - Information Confirmation and Verification**

Referee is required to be an immediate senior officer or professionally qualified referee where there is no senior officer.

Referee name\*

Referee email\*

Referee phone\*

Referee position/role\*

Relationship to applicant\*

< Save and go back

Submit to INAB >

All fields are mandatory.

Please enter your Referee name, Referee email address, Referee phone number, Referee's position/role and the relationship this Referee has with you.

Click the 'Submit to INAB' button in the bottom right corner and your Assessor application will be sent to the INAB Quality team for review.

My Events My NC Batches My Claims My Profile Library

### Create Profile

Profile complete

Congratulations. You have successfully created your profile.

Go home

A member of the INAB quality team will be in touch with you regarding your application.

If more information is requested you will be able to go through the wizard again to provide more information.

If approved you will be sent a contract to sign and return.