Technical Bulletin: UKAS transition process

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This Technical Bulletin explains the UKAS process for managing standard and scheme transitions.

If a UKAS accredited organisation wants to expand its scope, or to update its scope in relation to the methods it is using, then an *extension to scope (ETS)* is the general route taken.

There are also instances where higher-level documents are reviewed and updated such as the ISO/IEC 17000 series of standards and larger schemes. These changes also need to be assessed by UKAS and effective implementation demonstrated by the organisations that are accredited to them. The UKAS process for these cases is to carry out **transition** assessments.

If the scheme or standard is new to the conformity assessment body (CAB) then this would require a formal application to UKAS and would be processed as an *extension to scope*.

For transitions, UKAS will review the changes in the standard/scheme and formulate an approach that will ensure sufficient assessment is undertaken to demonstrate that the organisations have understood the changes and implemented appropriate processes and procedures within the organisation to demonstrate competence and compliance. Once this is completed by UKAS, communications will be issued to affected organisations either directly or through a Technical Bulletin on the UKAS website, depending on the number of organisations affected.

The **UKAS portal** will contain a simple form to request a transition. Transitions are managed as part of the ongoing accreditation lifecycle rather than via extension to scope (ETS) applications. Please request transition forms directly from your Assessment Manager until this form is available in the UKAS portal (anticipated late 2026).

Transitions will be completed for all changes to Level 3 and many Level 4 documents (see **Annex 1** for definitions of the levels). On occasion, Level 5 documents may well be assessed through the transition process e.g. ISO 9001, ISO 14001.

Annex 1

This annex details the different levels associated with accreditation. Transition assessments will be mainly focused on Level 3 and 4 documents.

Level 3 - Conformity Assessment Standards

Definition:

Harmonised standards (or other normative documents) that contain the general requirements for conformity assessment bodies (CABs) performing the activities listed under Level 2. These are the core accreditation standards against which National Accreditation Bodies (NABs) accredit CABs.

Examples of Level 3 standards:

- ISO/IEC 17025 (testing & calibration)
- ISO 15189 (medical laboratories)
- ISO/IEC 17020 (inspection)
- ISO/IEC 17065 (product certification)
- ISO/IEC 17021-1 (management system certification)
- ISO/IEC 17024 (certification of persons)
- ISO/IEC 17029 (verification/validation)
- ISO/IEC 17043 (proficiency testing providers)
- ISO 17034 (reference material providers)
- ISO 20387 (biobanks)

Role of Level 3:

- Directly used to define the scope of recognition for EA MLA signatories
- Basis for determining CAB competence across different conformity assessment activities

Level 4 - Sector Standards & Sectoral Schemes

Definition:

Documents supplementary to the Level 3 standards, providing additional sector-specific technical or procedural criteria that CABs must meet when operating in specialised fields.

These include:

- Sector-specific standards (e.g. ISO 15195, ISO 22870, CEN/TS 15675, ISO/TS 22003, ISO/IEC 27006, ISO 14065)
- Sectoral schemes
- Conformity assessment schemes as defined in EA-1/22

Key points:

- Only applicable where supplementary documents exist
- Often used where a Level 5 document (e.g., specific test method) must be linked to a more general Level 3 standard via sector-specific rules
- Approval of new Level 4 documents requires EA General Assembly (GA) endorsement via the relevant technical committees (Laboratory, Certification or Inspection - *LC, CC, IC*)

Level 5 - Scope-Level Normative Documents (CAB-specific / Method-level)

Definition:

Standards or normative documents actually used by accredited CABs to deliver accredited conformity assessment activities. These are the operational-level documents within a CAB's scope.

Examples:

- Specific testing methods, validated protocols, or analytical procedures
- Specific management system requirements, e.g. ISO 9001 or ISO 14001 when relevant to accredited activities

Key points:

- Level 5 sits at the bottom of the hierarchy, closest to the actual technical work undertaken by CABs
- Not normally defining the structure of the EA MLA, but defining the detailed scope of what a CAB is accredited to perform

Summary

Level 3 = the core accreditation standards (e.g., ISO/IEC 17025, ISO/IEC 17020, ISO/IEC 17065)

Level 4 = sector-specific supplements or schemes adding extra requirements to Level 3

Level 5 = method-level or CAB-specific normative documents defining exactly what is accredited within a CAB's scope

For reference there is a simple guide on the UKAS website, UKAS Approach to Transitions of Standards and Schemes, that you can visit to reinforce the details provided in this bulletin. If you are unsure whether your changes should be managed through the transition process or through an extension to scope, please contact your Assessment Manager.