



**TECHNICAL CIRCULAR No. 790 of 6<sup>th</sup> August 2023**

To	All Surveyors/Auditors. All flags
Title	<b>Planning and scheduling of Remote Survey/Audit.</b>
Reference	Remote survey

**Preparation for remote survey**

Criteria for initiating a remote survey/audit.

The use of remote survey is voluntary.

1. Remote Survey **shall** be considered when:

General

- Travel to a facility or specific location is not reasonable (i.e., for safety reasons, travel restrictions, etc.).

Examples of safety reasons include but are not limited to:

- Potential surveyor fatigue (e.g., due to working hours, personal issues)
- Inclement weather (keep in mind how the weather conditions may change)
- Ship to Ship transfer
- The is a systematic implementation of a management system (can be reviewed remotely).

Vessel

The vessel has a proven track record of conformance.

The **Remote** Surveyor is to consider the following prior to accepting a request for a remote survey\*:

If one of these conditions exist, it may warrant additional considerations prior to accepting the request for remote survey.

- i. When vessel has a history of flag/port state interventions/detentions.
- ii. During the previous surveys numerous Class or Statutory Conditions were raised
- iii. During previous audits, major non-conformances were identified
- iv. Vessel has extended surveys
- v. When Class has been suspended

Planning and scheduling of Remote Survey/Audit.

The remote surveyor is to determine whether the vessel/facility/specialist is an eligible candidate for remote survey. The overall objective is to perform the survey/audit and meet the requirements and as an equivalency to a physical attendance.

The remote survey surveyor should take into consideration the following when determining if it is appropriate to perform a survey remotely, such as:

**CONARINA Head Office**

6505 Blue Lagoon Dr. Suite 455

Miami, Fl., 33126

Tel: 1 (786) 558 5288,

Fax: 1 (786) 325 0200,

[Joel@conarinagroup.com](mailto:Joel@conarinagroup.com)



### General

- i. The acceptability of the survey task requested to perform a remote survey.
- ii. The criteria for appropriate use of remote survey.
- iii. Whether a list of activities, information, and personnel to be involved in the remote survey is available.
- iv. Whether there is a conflict of interest with the parties being surveyed remotely.
- v. Whether the vessel/facility/specialist
  - a. permits and accommodates remote assessment activity (i.e., availability of records in electronic format or document reader).
  - b. has the capability and aptitude to conduct the remote assessment in the chosen medium/forum of the remote survey.

### Vessel

- a. The acceptance of the flag administration of remote surveys.
- b. Providing visual/audio access to potentially hazardous locations, e.g. hazardous areas on the vessel such as main deck, cargo holds, machinery spaces.

Before initiating a remote survey, it is important to define:

- i. The agenda for the planned remote survey with pre-defined records and documentation to be available during remote assessment.
- ii. The desired scope of survey.
- iii. The list of activities, information, and personnel to be involved in the remote survey.
- iv. The list of items to be surveyed.
- v. The timeframe for conducting the remote survey (e.g., 4 hr./day for 3 days for example).
- vi. A plan on how to review information that cannot be shared remotely (e.g., due to confidentiality or access issues). The client should provide input on this process. The surveyor should define or express how this will be dealt with (e.g., follow-up with on-site attendance, issuance of a nonconformance, etc.).

Technology planning should include:

- i. Determining the platform (i.e., Upskill, Voice Over Internet Protocols (VoIP) such as Telecom/Skype/Facetime/WhatsApp/Up GoToMeeting/WebEx/Microsoft Lync, etc.) for remote survey, to be agreed upon between the surveyors.
- ii. Granting security and/or profile access to the surveyor.
- iii. Testing platform compatibility and connectivity.
- iv. Encouraging and considering the use of webcams, body cameras, smart glasses, etc. when physical evaluation of an event is desired or necessary.
- v. Proper security measures should be taken, when applicable, to protect confidential information.

Scheduling requires the following to be carefully considered:

- i. Time zone acknowledgement and management to coordinate reasonable and mutually agreeable convening times.
- ii. A trial meeting using the same media platforms agreed upon may be conducted to ensure the scheduled assessment will perform as planned.

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[Joel@conarinagroup.com](mailto:Joel@conarinagroup.com)



REFERENCES:

- CONARINA instruction, courtesy of ABS.

ATTACHMENTS: No

Kindest Regards,  
CONARINA Technical Office

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6505 Blue Lagoon Dr. Suite 455  
Miami, Fl., 33126  
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