

Records and Document Control Guidelines

v20251103

1. Responsibility for This Policy

The IRMA Secretariat holds responsibility for this document and its contents.

Version No.	Date	Description of Action or Amendment
20251103	03 Nov 2025	First published
20251114	14 Nov 2025	Audit report verification identifier reference added to 3.2

2. Purpose

Pursuing alignment with ISEAL Code of Good Practice 4.1, these Guidelines determine how IRMA scheme documents are named and versioned.

3. Documents with External Review and Comment

IRMA scheme documents that are reviewed by external stakeholders, whether publicly or otherwise, for the purpose of providing comments before document publication.

3.1 Standards

The naming format for Standards is:

Standard Name v#.# [DRAFT #] [XX]

E.g. IRMA Standard v2.0 DRAFT 2 EN

Whole number changes are for "major substantive changes that are made as a result of a formal review process"

Decimal changes are for "minor substantive changes that are made outside a formal review process"

The "v" for "version" is lower case.

When a draft version is made public, add DRAFT and the number of the draft after the name version.

If translated into a language in addition to English, the two letter language suffix is added [XX] (see suffix list in Translated Documents).

Standard support documents (e.g. guidance) follow the IRMA Default naming format.

3.2 Assurance

Assurance documents that undergo external review use the Standards naming format.

Each audit report is assigned a unique verification number (unique to each audit, but not to each language) by the independent audit firm conducting the audit. Verification numbers follow the format identified in Annex G of the IRMA Audit Firm Requirements.

Assurance documents that are neither audit reports nor undergo external review follow the IRMA Default naming format.

4. IRMA Default

IRMA scheme documents that do not undergo external review and comment prior to publication.

The IRMA Default naming format is:

Document Name vYYYYMMDD [XX]

E.g. Communications and Claims Policy v20230412

4.1 Version Date

When the document is approved for publication as with a board approved policy, the version date is the date of approval.

When it is unclear the exact date on which a change occurred, the middle of the time period for the uncertainty should be used for the version. E.g. v20221115 for when a change occurred in November but the day is uncertain.

5. Translated Documents

IRMA scheme documents that do not undergo external review and comment prior to publication.

If a document is translated into a language in addition to English, the translated version is the same version as the original English – but the change log chart is updated to reflect the date of translation.

When any version of a document is translated, a two letter language suffix is added [XX] to all versions (including English).

The two letter language suffix is usually the two letter country code associated with the language. IRMA follows the UN conventions in naming languages. Commonly used language suffixes include:

ZH: chinese (mandarin)

EN: english

ES: español

FR: french

ID: indonesian/bahasa

PT: português

RU: russian