



FACTORY EVALUATION

# Initial Factory Evaluation for CSA Mark(s)

## WHAT IS AN INITIAL FACTORY EVALUATION (IFE)?

The Initial Factory Evaluation (IFE) is a preparatory visit intended to provide information to our clients' manufacturing locations about the CSA inspection process and determines whether a factory is ready to start producing CSA certified products. The IFE requires in-person visits by a CSA Field Service Representative (FSR). A remote IFE can be done under special circumstances, such as a pandemic that limits travel, pending formal review and approval by the Director, Global Inspections and with the condition that an on-site validation assessment is conducted within three months of when on-site inspections resume.

## What is the Purpose of the IFE?

CSA evaluates the capability of a client's factory to produce products within a consistent manufacturing process before authorizing the application of the CSA mark to a certified product.

Main objectives covered during the IFE are:

- 1. Global Service Agreement and Facility Terms:** Fostering confidentiality and relationships among CSA, its clients and their factories.
- 2. Guidelines for Use of CSA Mark:** Establishing correct use of CSA mark(s) on end-products, components and advertising media.
- 3. Admin Inspection:** Identifying and isolating non-conforming products, reviewing safety issues reported from the market.

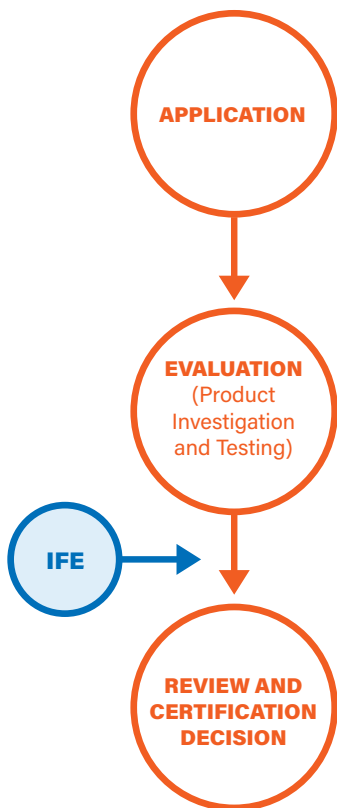
- 4. Product Inspection:** Assuring compliance with the CSA report, alternate components and materials, markings, and conformity testing.
- 5. Factory Auditing:** Reviewing the testing procedures, frequency, equipment, and calibration for compliance with CSA requirements.

## When Does CSA Conduct an IFE?

- Initial Factory Evaluations are conducted on all new manufacturing facilities, and for new product classes, in all countries.
- Certification and authorization to use CSA mark(s) can only be granted after an IFE has been completed successfully.
- The ideal time for an IFE is between evaluation (product investigation and testing) and the review/certification decision.

## What is the IFE Procedure?

The role of the CSA Field Service is to protect the integrity of the CSA mark and support our customers in producing products compliant with the certification granted by CSA.



To initiate the CSA IFE process, CSA Field Service Representative (FSR) will contact the CSA client's manufacturing site to arrange the IFE and cover the following steps either in person or virtually:

### 1. Meeting with Factory Representative (Administrative)

Review and discuss the following administrative topics regarding CSA product certification:

- Obtain the name of the submitter and the factory contact person.
- The role of the Factory Representative(s) during a regular CSA Inspection.
- The CSA Global Service Agreement and Facility Terms.
- The CSA certified model number(s) and the requirements for use of the CSA mark on packaging and advertising.
- Requirements for Conformity Testing and sample(s) pick-up (as applicable).
- Access to factories (no waivers will be signed as a prerequisite for entry) and related safety concerns.
- Record of customer complaints.
- The CSA record updating process, i.e.: CSA reports updates, factory relocations.
- Inspection frequency and CSA fiscal year (April 1 – March 31<sup>st</sup>).

### 2. Factory Tour

Validate factory manufacturing and testing processes:

- Document the methods used for controlling components and construction of CSA-marked products.
- Witness the execution of any required factory tests according to applicable CSA report(s) and standards i.e.: Dielectric, Ground Continuity, Pressure, Leakage (as applicable).
- Review records of the test results for the required factory test.
- Review Calibration Certificates.
- Where applicable, review the Manufacturing Quality Program and Production Test Program (i.e.: for gas products).
- Identify the layout and size of the factory for future planning of inspections.

### 3. Relevant Product Inspection Rules/Requirements

Review and discuss relevant aspects of a CSA inspection, and prepare the factory for a future audit, i.e.:

- Critical components.
- Alternative and Interchangeable ("INT") components.
- Certificates of Compliance(s) for materials (ie: plastics) and subassemblies manufactured by subcontractors.
- Use of subcontractors.
- If applicable, cover the requirements/needs for wiring harnesses certification.
- CSA marking(s) requirements for end products and components.

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