

Steps to be followed by Regional Director

| Stage | Login Action | Preceding condition |
|-------------|--|--|
| 1 | Registers with Accreditation Portal and creates login id and password | Briefed about new Accreditation process |
| 2 | Reviews and approves candidate application | Candidate has submitted application and an email alert has been received |
| Final stage | Clicks on the link in email alert to go on the portal and confirms that the accreditation has been noted or if required discusses with Industry Expert offline. | Industry expert has approved the accreditation and Regional Director has received a email alert. |

Steps to be followed by the Assessor

| Stage | Login Action | Preceding condition |
|-------------|--|---|
| 1 | Login to Accreditation portal and create user Id and Password | Have been briefed about the new accreditation process |
| 2 | Indicate availability for accreditation over the next few weeks on the Portal calendar . | Assessor has been intimated about a upcoming accreditation via email |
| 3 | Review candidate profile and the MR proposal submitted in response to brief and raise queries and request for additional evidence in the form of previous reports if required. | Email alert received after candidate has submitted the Proposal. |
| 4 | Note the date for group discussion and interview proposed by the candidate | Candidate has selected one of the available option from the available dates indicated by the Assessor earlier |
| 5 | No login – Assessor should be available for GD and Interview at the venue indicated by the candidate. | Candidate has indicated venue details on the portal and a email alert is received |
| 6 | Assessor submits summary report on the portal and clicks ‘To discuss’ button . | Interview is completed |
| 7 | No Login – Discussion between Assessor and Auditor once Auditor receives a email alert will be outside the system. | |
| Final stage | Submit the final report to Auditor Clicks either Approve or Reject option to indicate final recommendation . | Off line discussion is completed and draft for final report is agreed |
| Payment | Invoice is uploaded on the system | Final report is submitted to Auditor |

Steps to be followed by the Auditor

| Stage | Login Action | Preceding condition |
|-------------|---|--|
| 1 | Login to Accreditation portal and create user Id and Password | Have been briefed about the new accreditation process |
| 2 | No Login : Note upcoming accreditation in calendar offline | Auditor has been intimated about a upcoming accreditation via email |
| 3 | Clicks on the link received with “ To Discuss “ email from Assessor and views the page on the portal | Assessor has submitted the summary Assessment and clicked “ To discuss button” |
| 4 | No Login – Discussion between Assessor and Auditor once Auditor receives a email alert will be outside the system | Auditor has reviewed the candidate’s documents along with the summary report . |
| 5 | Auditor prepares and uploads the draft Assessment report and clicks “ To discuss” | Final Assessment report along with the recommendation is received from the Assessor. |
| 6 | No Login – Discussion between Auditor and Industry expert offline once Auditor receives an email alert will be outside the system. | The auditor has prepared the draft assessment report . |
| Final Stage | Submit the final report to industry expert Clicks either Approve or Reject option . Also selects final recommendation as a Temp / Full Accreditation. | Off line discussion is completed and draft for final report is agreed |
| Payment | Upload one invoice for Accreditation completed in the month after downloading report from system. | The accreditation process is completed and submitted to Industry expert |

Steps to be followed by industry expert

| Stage | Login Action | Preceding condition |
|-------------|---|--|
| 1 | Login to Accreditation portal and create user Id and Password | Have been briefed about the new accreditation process |
| 2 | No login - Note upcoming accreditation in calendar offline | Industry expert has been intimated about a upcoming accreditation via email |
| 3 | Clicks on the link received with “ To Discuss “ email from Assessor and views the page on the portal | Auditor has submitted the summary Assessment and clicked “ To Discuss “ button |
| 4 | No Login – Discussion between Industry expert and Auditor once Auditor receives a email alert will be outside the system | Reviews Auditor’s summary recommendation along with related history of candidate’s accreditation on the portal |
| Final Stage | Downloads the report written by Auditor , Adds comments , uploads final report and clicks – Approve / Reject button. | Auditor has submitted the final report with recommendation. |
| Payment | Upload one invoice for Accreditation completed in the month after downloading report from system. | The accreditation process is completed and submitted to Industry expert |

Steps to be followed by IQKS* Manager

| Stage | Login Action | Preceding condition |
|-------|--|--|
| 0 | Respond to queries by candidate regarding Accreditation via email / phone | Enquiry by candidate regarding accreditation prior to registering |
| 0 | Contact Assessors via email / phone to obtain agreement to participate in Accreditation program . Obtain cost proposal for Assessment | Accreditation calendar has been finalized |
| 0 | Update ALL masters on the system on a regular basis | Change in status or details of various users of the system - Change in parameters |
| 1 | Follow up to ensure timely approval / rejection of new candidate applications pending with regional directors | New candidate has submitted application |
| 2 | Allocate Assessor , Auditor and Industry expert along with respective fees . | Candidate's application has been approved by Regional Director. |
| 3 | Confirm and record receipt of payment from candidates | Candidate remitted fees and confirmed on line. |
| 4 | Allocate brief | The auditor has prepared the draft assessment report . |
| 5 | Monitor on time performance of Assessment on the system .Communicate with all users on email or phone and ensure OTIF completion of process . Availability 24/7 for all time zones . | Candidate payment has been received and is going through various stages of accreditation |
| 6 | Payment to Assessor | Once the invoice is uploaded by Assessor on the system. |
| 7 | Payment to Auditor and Industry Expert | Monthly basis – Once the invoice is uploaded on the system |
| 8 | Issuance of Accreditation letter and Certificate | Once clearance is received from Regional Director |
| 9 | Download MIS reports monitoring efficiency of Accreditation of program | Monthly basis |
| 10 | Download old accreditation reports | When there is a query regarding old accreditation |

1. CMILT Members will have to login and create their user Id and password on a one time basis .
CMILT Members will have access and view all the data on the portal .

They will also receive an email alert every time a new candidate is accredited . This alert can be switched-off if not desired

- 2 . Other Managers who are part of Qualitative Accreditation core team can also create their own user id and password and view data .

| IQKS MANAGER | <u>Candidate</u> -Portal Training - Fees related - Problem resolution - Accreditation letter | <u>Assessor</u> - Assessment planning - Costing - Problem resolution - Payment | <u>Auditor</u> - Payment - Problem resolution | <u>Industry expert</u> - <u>Payment</u> - Problem resolution - Candidate data base query | <u>Regional Director</u> - Problem resolution |
|---------------------|--|--|---|---|--|
|---------------------|--|--|---|---|--|

| | |
|-----------|--|
| Candidate | Can speak with Assessor offline to communicate regarding location of the Venue for Group discussion and interviews Can call the Assessor to check on requirement to submit optional documents ie Summary, Past report , full report etc . |
|-----------|--|

| | |
|----------|--|
| Assessor | DISCUSSION WITH CANDIDATE Will communicate with candidate to seek clarifications about documents submitted , can ask for additional documents to be submitted . If additional clarifications are required AFTER the candidate has submitted documents via the porta , the assessor may ask for the same offline directly |
|----------|--|

Use of “ TO DISCUSS” FUNCTIONALITY BY ASSESSOR / AUDITOR/ INDUSTRY EXPERT

Both the Assessor and Auditor have the option of making the candidate data and the summary report visible to the next level so that they can discuss the case offline and then based on inputs received draft the final report and submit with Approve or Reject option.

| | |
|-------------------|--|
| Regional Director | May discuss offline to evaluate Candidate prior to approval for accreditation May discuss with Industry Expert to seek clarifications regarding finally accredited candidates May discuss with senior line managers of clients in case of ‘ sensitive cases’ |
|-------------------|--|

Launch Date - Dec 2015 / Jan 2016