



# Accreditation Portal User Guide

Organization Representative

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# Getting Started

## ICF Support

For assistance with the accreditation Portal, please reach out to ICF Coaching Education Staff at [support@coachingfederation.org](mailto:support@coachingfederation.org).

For assistance or questions regarding your specific accreditation, please contact your Accreditation Excellence Manager at [support@coachingfederation.org](mailto:support@coachingfederation.org).

### Accreditation Excellence Managers:

Leslie Cavin - Asia Pacific & Oceania

Cody Cioffe - Europe, Middle East, & Africa

Mariela Tirado Rivera - North America, Latin America, & Caribbean

Rockelle Ward - Director of Global Accreditation

Maria Lester - Global CCE Manager

## Supported Browsers and Platforms

**Google Chrome:** Windows 10, 8.1, 8 & 7, limited support on MAC OS X and iOS

**Microsoft Edge:** Windows 10

**Firefox (current version):** Limited support on Windows 10, 8.1, 8 & 7

**Safari (current version):** Limited support on MAC OS X and iOS

For the best user experience, we recommend using Microsoft Edge or Google Chrome.

### Other Browser Requirements:

- JavaScript must be enabled on your web browser.
- Cookies must be enabled on your web browser.

# Getting Started

## Login- Member Profile

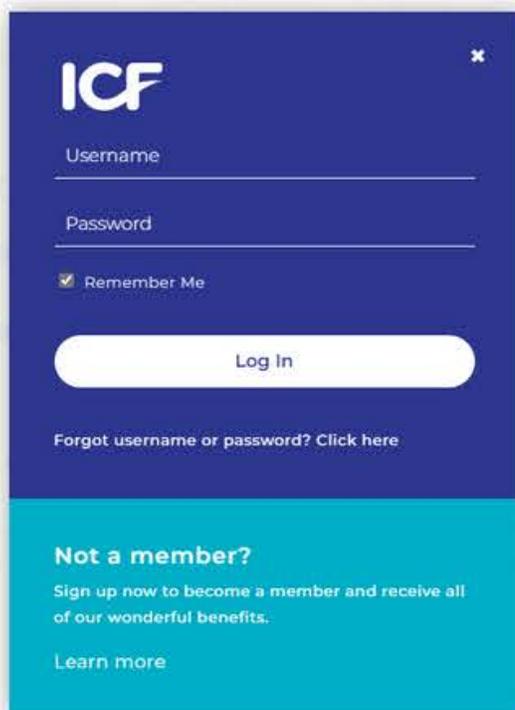
Access the ICF Member login page using the URL in your selected browser:

[www.coachingfederation.org](http://www.coachingfederation.org)

Select "Sign In" in the top right-hand corner of the screen.



Log in to your ICF Member Profile using your ICF member email address and password.



If you do not remember your ICF login information, please contact ICF at [support@coachingfederation.org](mailto:support@coachingfederation.org).

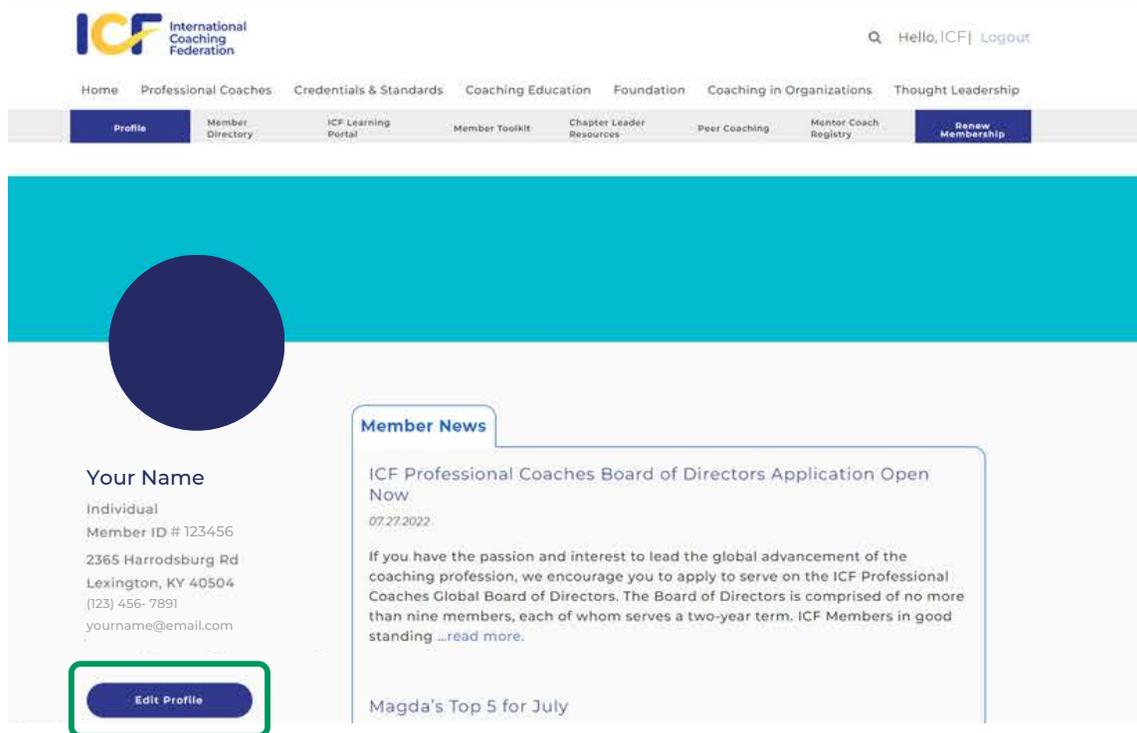
**Note:** If you are not a current ICF member, you can create a non-member profile on the ICF website. This will allow you access to the accreditation portal, but you will not have access to other ICF member benefits.

See page 8 for instructions.

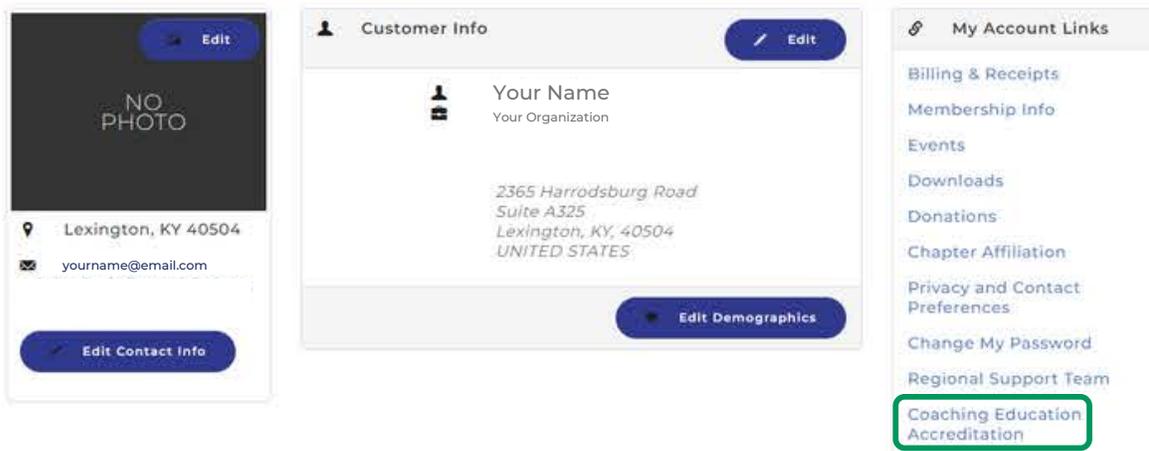
# Getting Started

## Login

Once logged in to your Member Profile, select "Edit Profile" under your contact information.



On your Member Profile page, click "Coaching Education Accreditation" on the right-side menu.



# Getting Started

## Login

Select "Access Accreditation Portal" to apply for accreditation, update your profile, and see accreditation status for your organization(s).



Q Hello, ICF | Logout

Home Professional Coaches Credentials & Standards Coaching Education Foundation Coaching in Organizations Thought Leadership

## My Accreditation

← Back to My Profile

Link To An Organization

Record No.	Organization Name	Address
12345	Your Organization	123 Address Dr.

Access Accreditation Portal

## Link an Organization

If the organization you are looking for does not appear, you can link it to your account by selecting "Link to An Organization."



Q Hello, ICF | Logout

Home Professional Coaches Credentials & Standards Coaching Education Foundation Coaching in Organizations Thought Leadership

## My Accreditation

← Back to My Profile

Link To An Organization

Record No.	Organization Name	Address
12345	Your Organization	123 Address Dr.

Access Accreditation Portal

# Getting Started

## Link an Organization

Use the search boxes to enter information about the organization you are looking for. You can search by organization name, email address, or postal code.

### Search for an Organization

If you think an organization already may have a profile, you can search for it and add it.

[← Go Back](#)

Organization Name:

Primary E-Mail:

Postal Code:

If the organization exists in the system, it will appear on the search results page. Select "Link to This Organization" to connect it to your profile.

### Organization Search Results

[← Go Back](#)

If the organization you are looking for is listed below, please use the button under associated with organization name to it, otherwise please click here to add a new organization to the system.

▼ Results

Record No.	Organization Name	Email	Address	State	Zip Code	
12345	Your Organization	yourname@email.com	123 Address Dr.		012345	<input type="button" value="Link To This Organization"/>

# Getting Started

## Link an Organization

If the organization does not exist in the system, or if you don't see it on the search results list, you can add it by selecting "None of the Above."

**Organization Search Results** [← Go Back](#)

There are no organizations that match your search, or matching organization is already in a relationship with you. Please use the "None of the Above" button if you would like to add the organization manually.

▼ Results

Record No.	Organization Name	Email	Address	State	Zip Code
<a href="#">None Of The Above</a>					

Complete the Organization Information page by filling in the organization information.

### Add Organization

#### Organization Information

Name:

Required

#### Primary Address Information

Mailing address line 1:

Line 2:

Line 3:

The organization should now appear on your profile. Click "Access Accreditation Portal" to continue.

### My Accreditation

[← Back to My Profile](#)

[Link To An Organization](#)

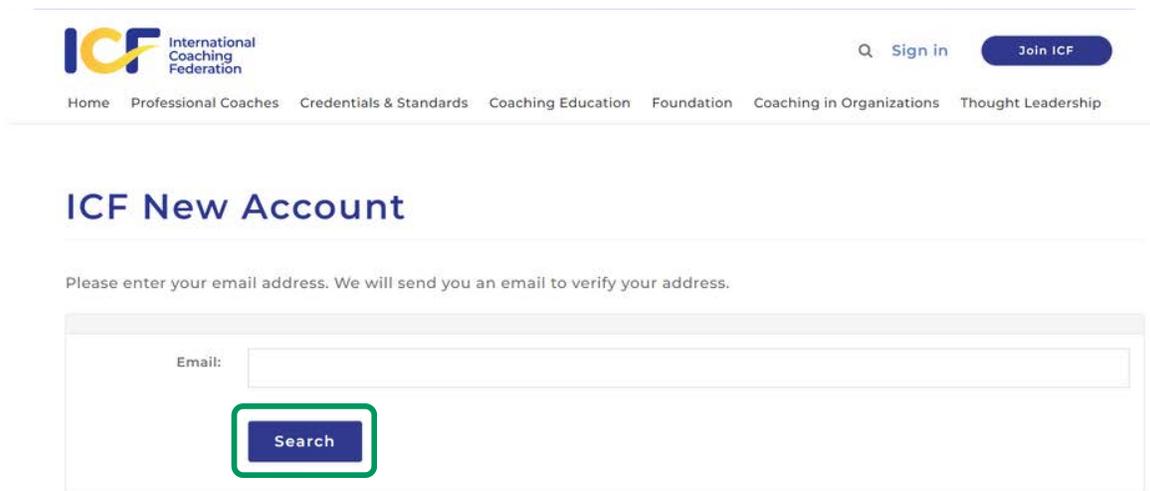
▼ Accreditation

Record No.	Organization Name	Email	Address	Action
12345	Your Organization	yourname@email.com	123 Address Dr.	<a href="#">Access Accreditation Portal</a>
12346	New Organization	yourname@email.com	123 Address Dr.	<a href="#">Access Accreditation Portal</a>

# Getting Started

## Login- No Member Profile

Enter your email address and select "Search."



The screenshot shows the ICF website header with the logo and navigation links: Home, Professional Coaches, Credentials & Standards, Coaching Education, Foundation, Coaching in Organizations, and Thought Leadership. There are 'Sign in' and 'Join ICF' buttons. Below the header is the 'ICF New Account' section with the instruction: 'Please enter your email address. We will send you an email to verify your address.' The form contains an 'Email:' input field and a 'Search' button, which is highlighted with a green rectangular box.

You will receive an email to confirm your email address. Click the link in this email to create your account. Fill in the information in the form.

### ICF New Account | Individual

#### Personal Information



The 'Personal Information' form section includes four input fields: 'First Name', 'Last Name', 'Password', and 'Confirm Password'. Each field has a 'Required' label in red text below it. There is also a small eye icon next to the 'Confirm Password' field.

#### Address Information

Once your account has been created, you will log in to your Member Profile following the steps beginning on page 4 to access the accreditation portal. Then, follow the steps to link to a new organization.

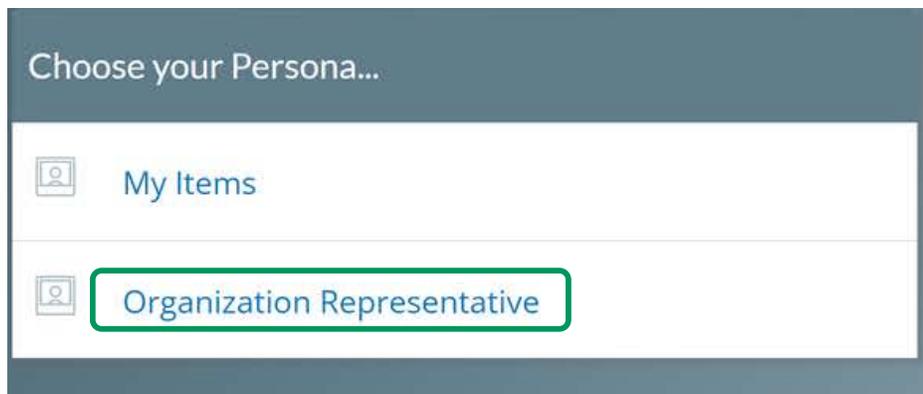
# Getting Started

## Personas

When logging in, you may have access to two Personas to select from:

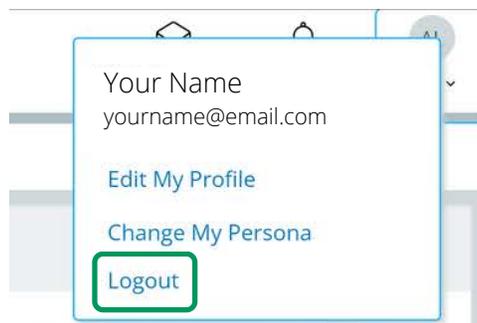
1. **My Items** – This is a dashboard specifically showing your assignments and information.
2. **Organization Representative** – This is a dashboard specifically showing the organization(s) you are assigned to.

Select “**Organization Representative**” to view and access all the details related to your designated organization(s).



## Logout

The "Me" icon in the top right corner of your Home Screen/Dashboard provides access to log out of the system.

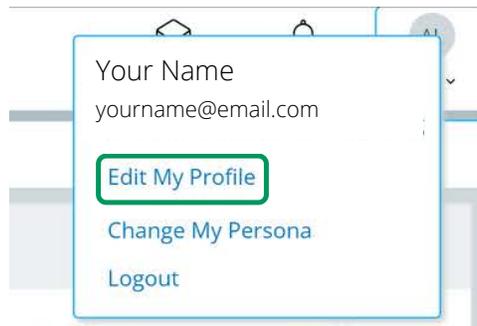


Select the "Me" icon, and choose "Logout."

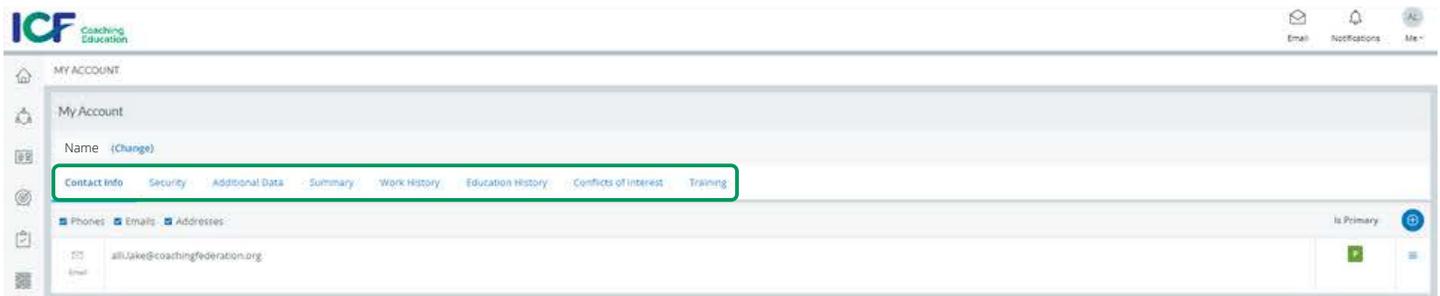
# Getting Started

## Updating Your Account Information

To update your account information, first select the "Me" icon and choose "Edit My Profile."

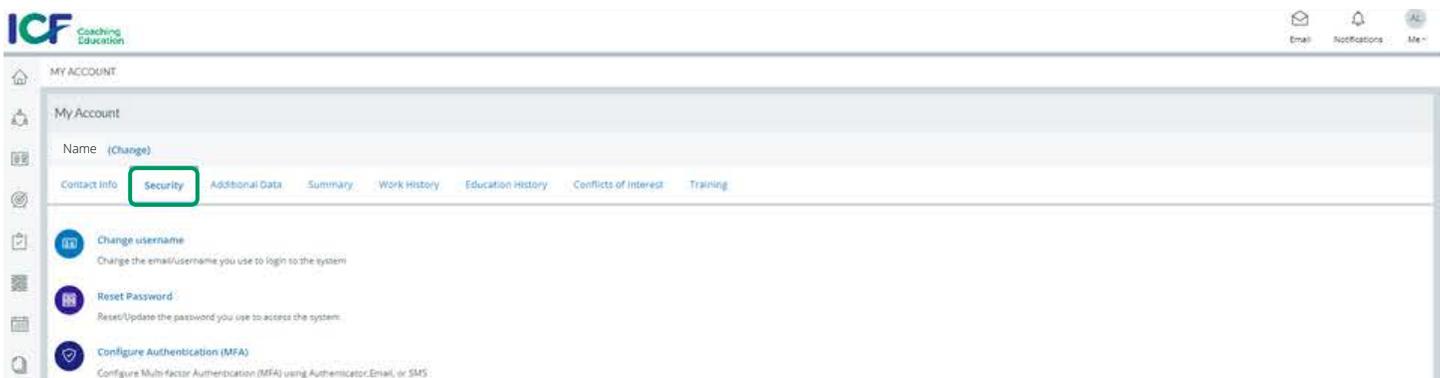


Once you select "Edit My Profile" you will see the screen below.



When you select an option on the horizontal navigation (Contact Info, Security, Additional Data, etc.) you will be able to add/edit your information as applicable.

To view/change your security settings, select "Security."

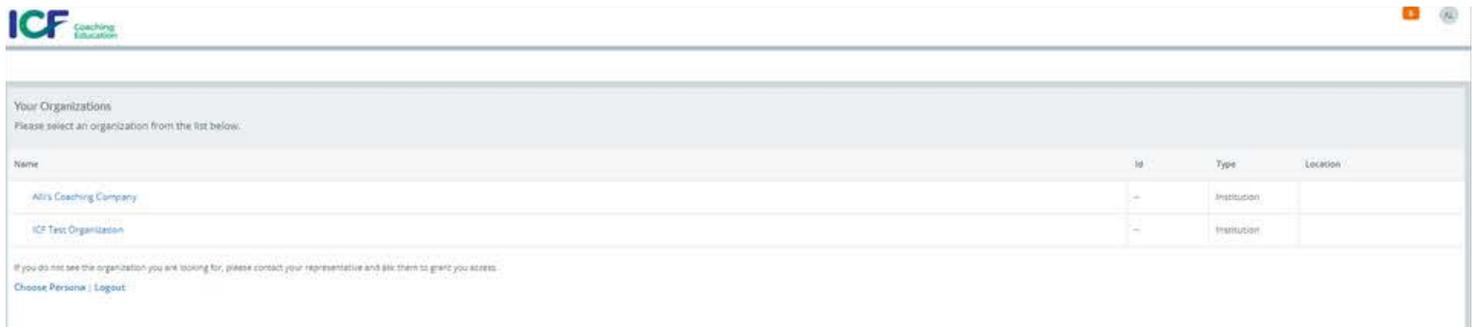


Here you can change your email/username and reset your password.

# Dashboard

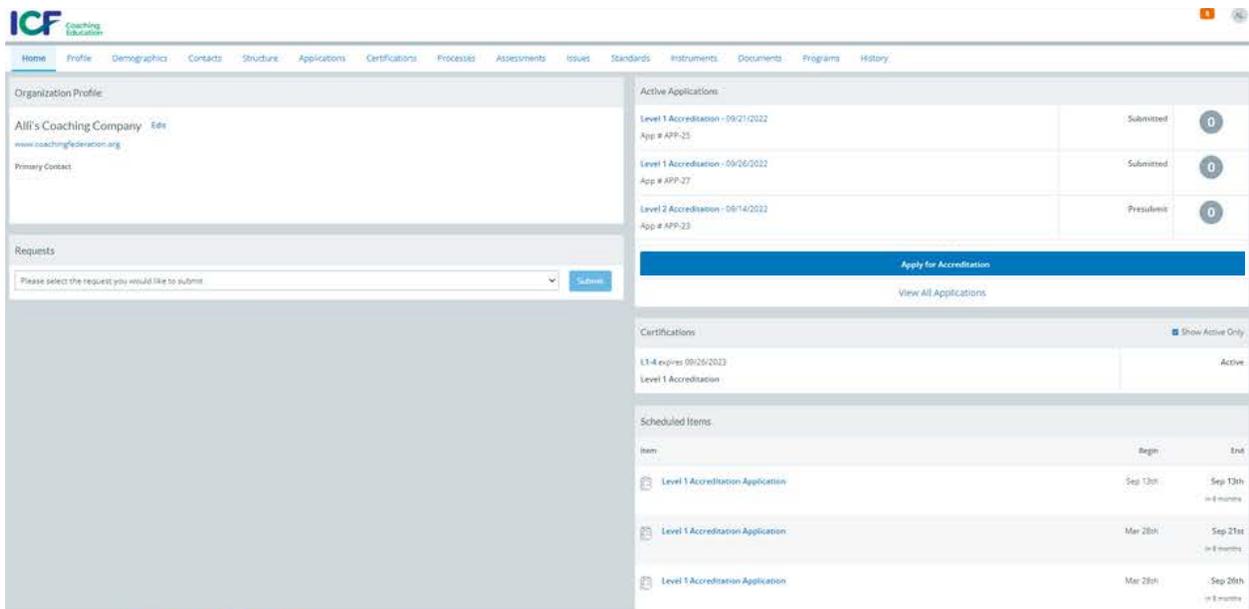
## Organizations

If you have access to multiple organizations, you will see these in a list allowing you to select which one you wish to access.



Select your organization to navigate to your Dashboard.

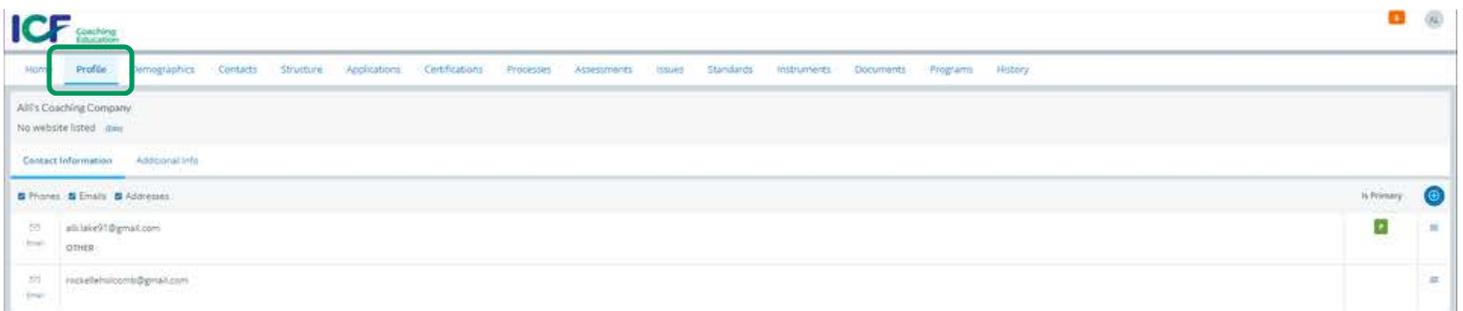
Your Dashboard provides a summary view of activities, actions, and status so you can see what's in progress, at a glance. You will be able to view active certifications, a history of applications, and any other requests you have made. In addition, navigation tabs located across the top of the screen provide more in-depth information. You'll find more information about these sections in the screenshots that follow.



# Dashboard

## Profile

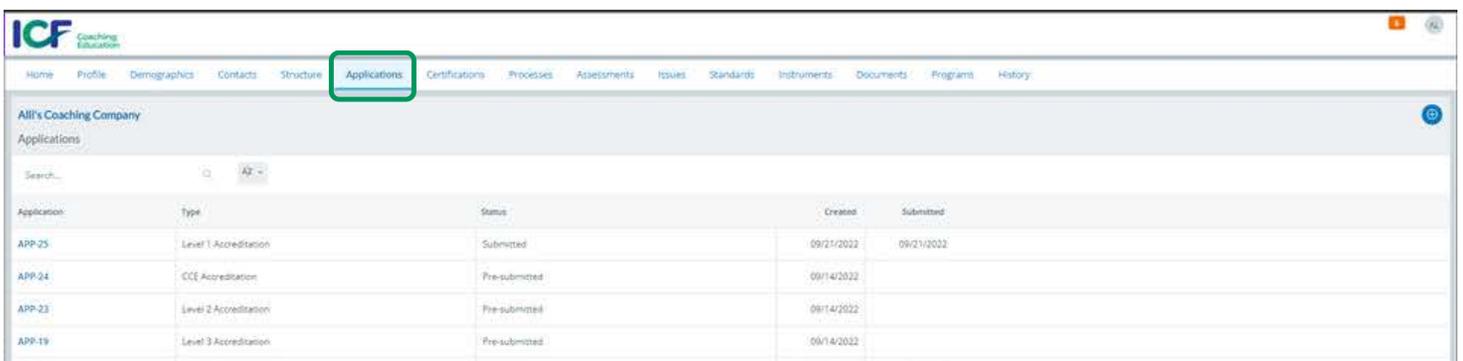
The Profile section, shown below, enables you to view key information such as address(es), contact information, and other applicable organization data.



The screenshot shows the ICF Coaching Education profile page for 'Alli's Coaching Company'. The 'Profile' tab is selected in the navigation menu. The page displays contact information, including email addresses: alli.lake71@gmail.com and rachel@lehigh.com. There are also sections for 'Phones', 'Emails', and 'Addresses'.

## Applications

This section displays the status of any applications you have submitted or are working on. For ease of navigation, you can click directly through to each of the applications to access further information.



The screenshot shows the ICF Coaching Education applications page for 'Alli's Coaching Company'. The 'Applications' tab is selected in the navigation menu. The page displays a table of applications with columns for Application, Type, Status, Created, and Submitted.

Application	Type	Status	Created	Submitted
APP-25	Level 1 Accreditation	Submitted	09/21/2022	09/21/2022
APP-24	CCE Accreditation	Pre-submitted	09/14/2022	
APP-23	Level 2 Accreditation	Pre-submitted	09/14/2022	
APP-19	Level 3 Accreditation	Pre-submitted	09/14/2022	

# Dashboard

## Accreditations/Certifications

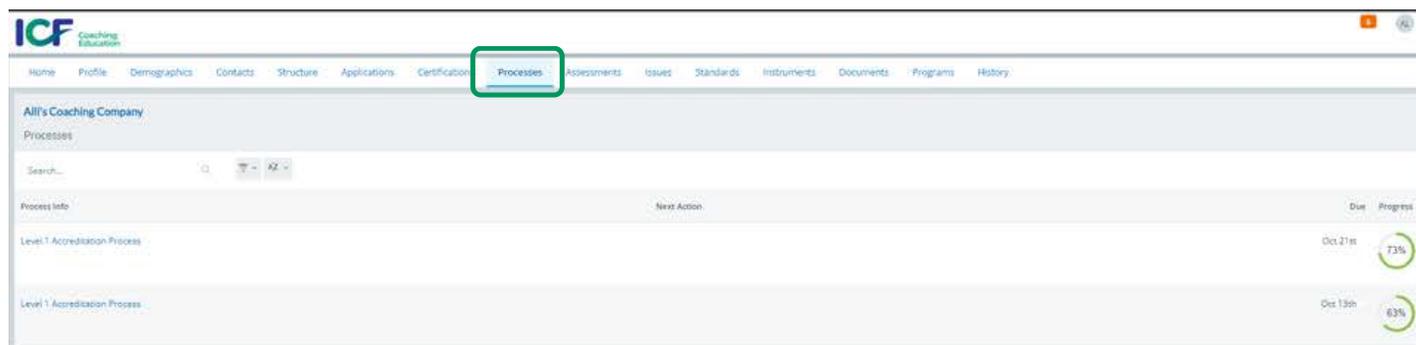
When navigating to this section you will be able to see the status of any certifications that apply to your organization.



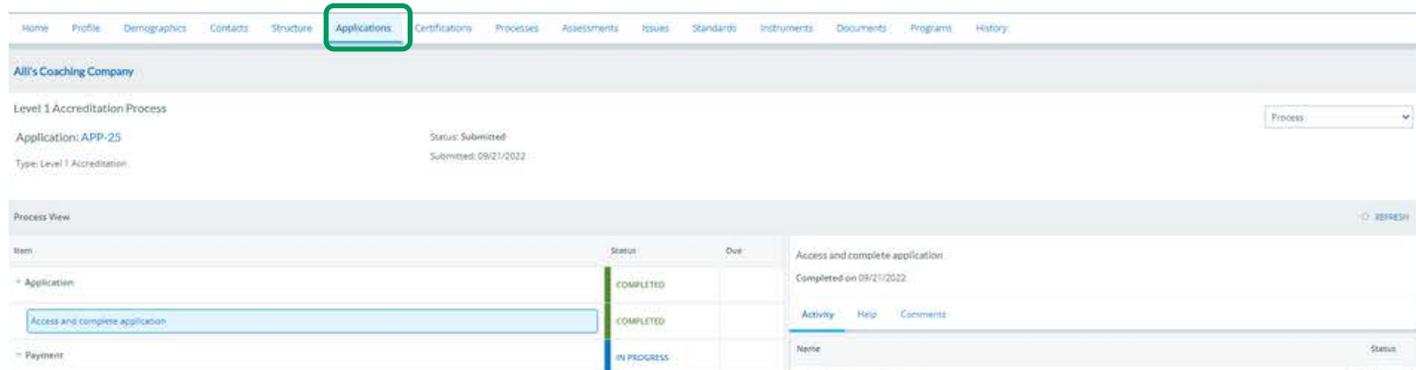
Certification is the language that this system uses for accreditations. In the example above, you will see one active Level 1 accreditation/certification.

## Processes

Here you can view any processes associated with the organization you are assigned to, along with a progress summary and due dates. Processes are the steps you need to complete to submit and receive your accreditation approval.



If you select any of the applicable processes, you will be taken directly to a process overview that provides you a snapshot of where an organization is in the context of the entire accreditation process.



# Dashboard

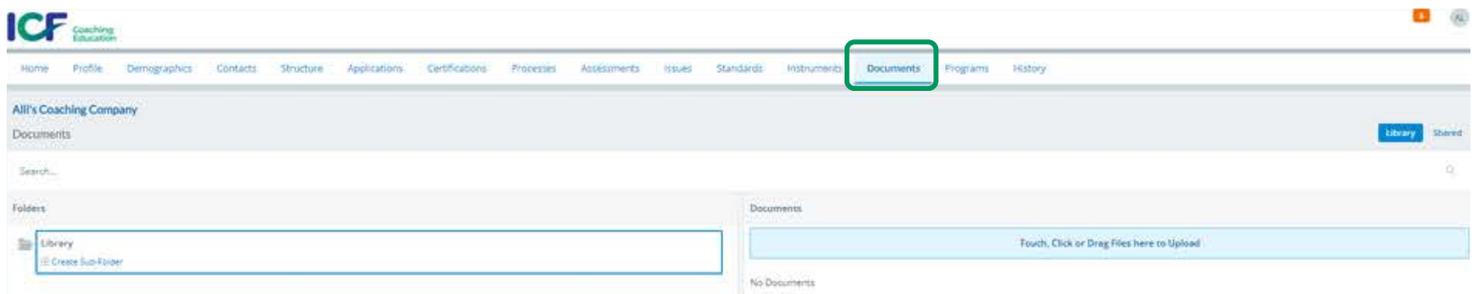
## Standards

Here you can view the applicable standards that relate to the organization you are assigned to.



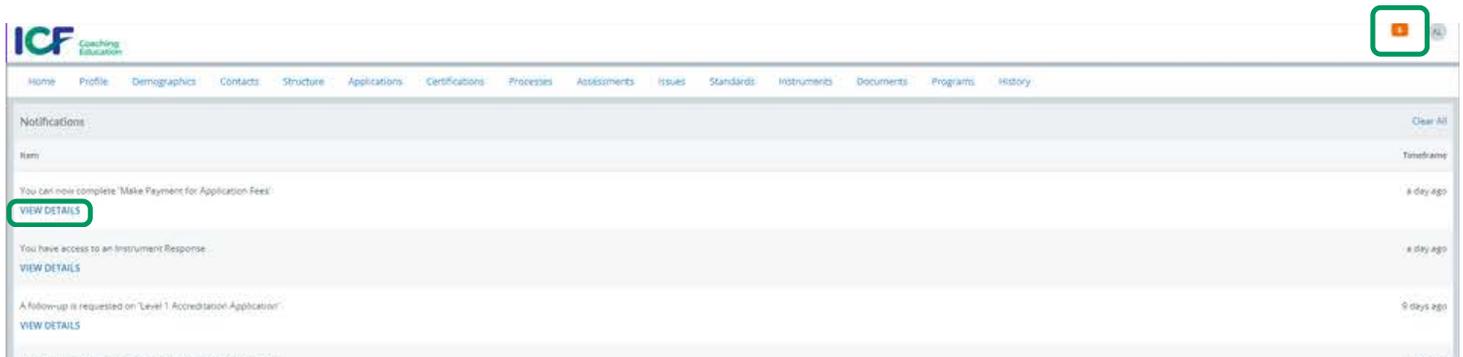
## Documents

Here you will find any documentation associated with your organization. You will be able to view/download and upload documents as you wish. The screen will default to the "Library" tab within the "Documents" page. To download any documents that may have been shared to you, select the "Shared" tab.

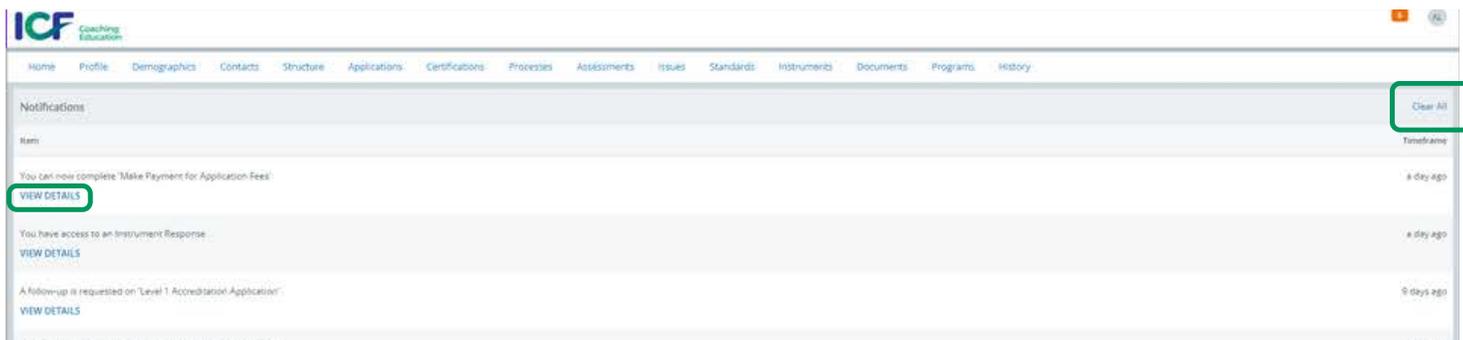


# Notifications

You will receive notifications via the bell in the top right corner of your screen when certain actions need your attention. The number indicates how many new notifications are available. By clicking **“View Details”**, you will be able to access further information regarding the notification.



To access your notifications select the **“bell”** icon. Notifications are dismissed individually by selecting a **“View Details”** link or all at once by selecting the **“Clear All”** link on the top right of the notifications screen.

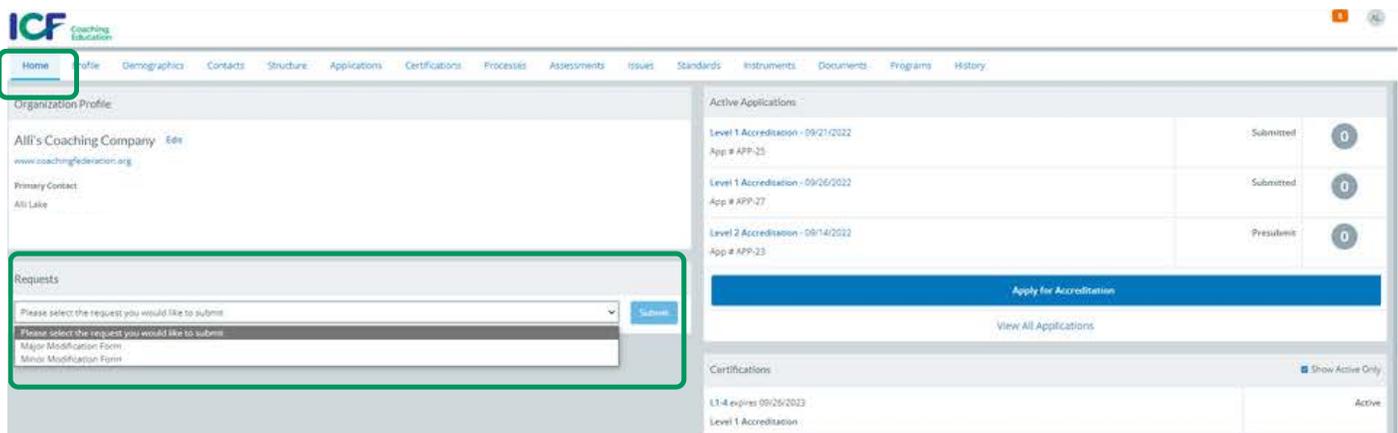


Email notifications will also be sent to you directly.

# Requests

The Requests section, which is located on your homepage allows you to request changes to your program. There are two types of modifications: Major and Minor.

- Minor Modifications include:
  - Minor changes to organization's policy documents
  - Updating your faculty list
  - Changing delivery locations and languages
- Major Modifications include:
  - Major changes to your organization's policy documents
  - Changes to participant contact hours
  - New courses or changes to existing courses
  - Significant changes to your faculty changes



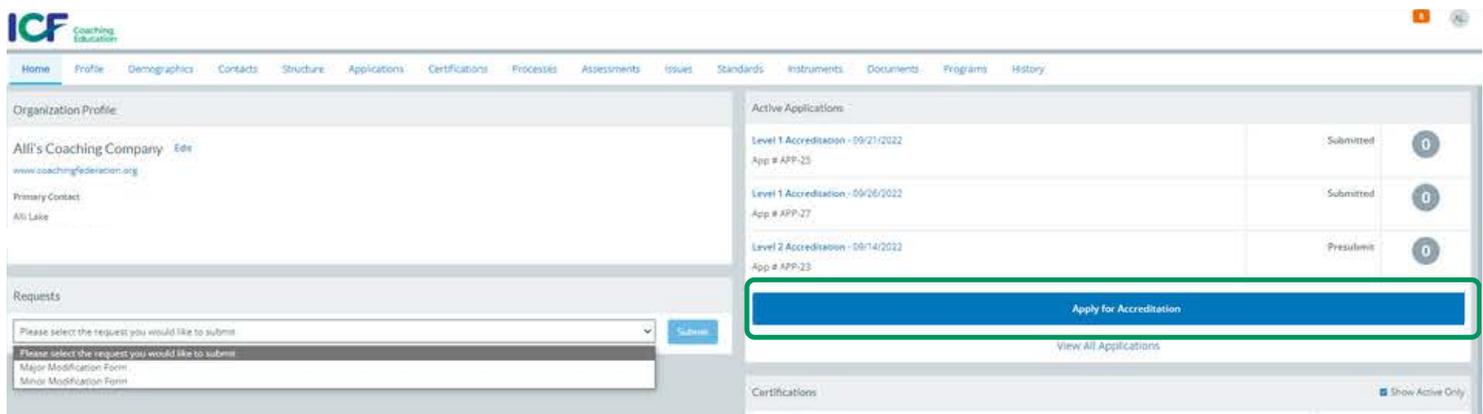
To initiate a request, select the dropdown menu and make your selection. If you are submitting a change request, complete the form to indicate the changes being made. An example of the major modification request is shown below.

A screenshot of the 'Edit Form' window for a 'Major Modification Form'. The window title is 'Edit Form' with a close button. The form content includes a header 'Major Modification Form' and a thank-you message: 'Thank you for indicating your interest in updating your ICF accreditation records. This form will allow you to update the following areas for ICF staff review:'. Below this message is a bulleted list of areas for review: 'Organization policy documents', 'Add/Remove accredited participant contact hours', and 'Faculty List'. At the bottom of the form, there is a prompt: 'Please select the accreditation you would like to submit updates for:'.

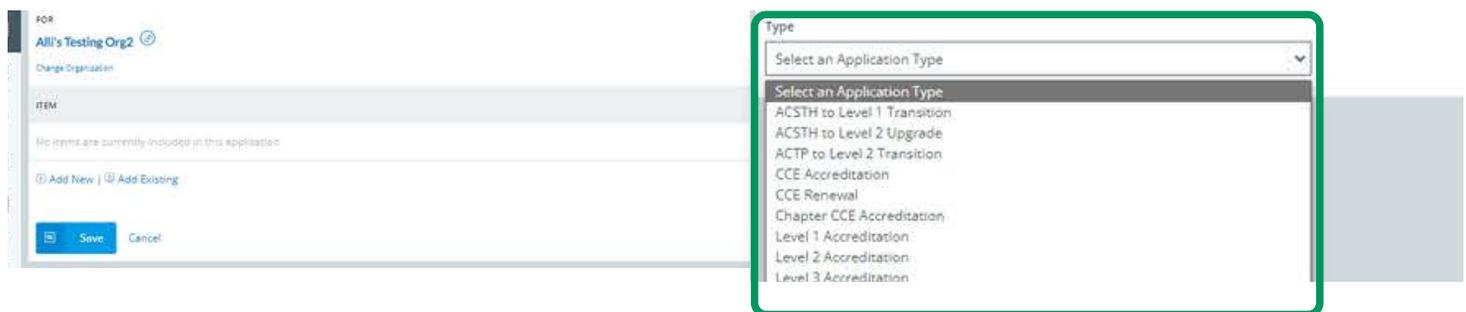
# Accreditation Process

## Apply for Accreditation

To apply for an accreditation, first follow the process for logging into the Accreditation Portal, outlined on page 4. Once logged in to the system, select the blue "Apply for Accreditation" button on the right-hand side of the screen.



Select your application type from the drop-down menu.

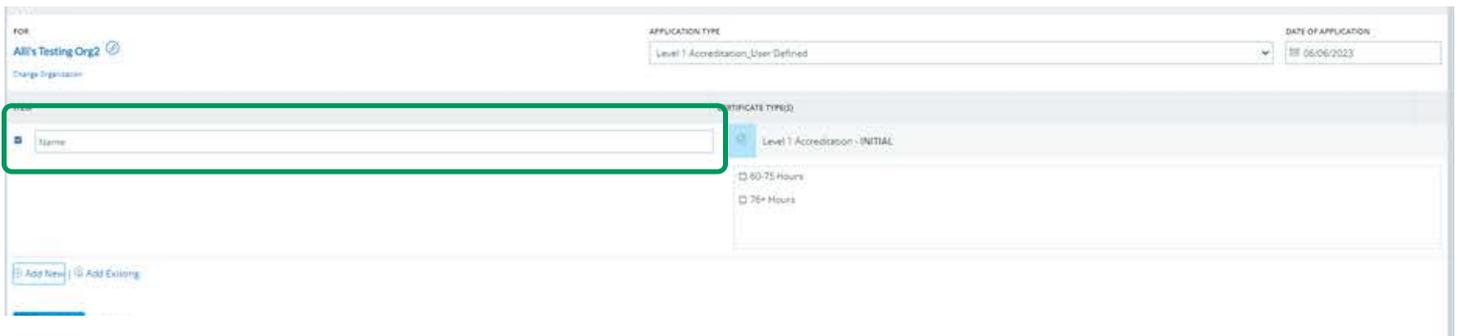


This will open a new application request where you can enter additional details about your program, including the program name and scope of hours.

# Accreditation Process

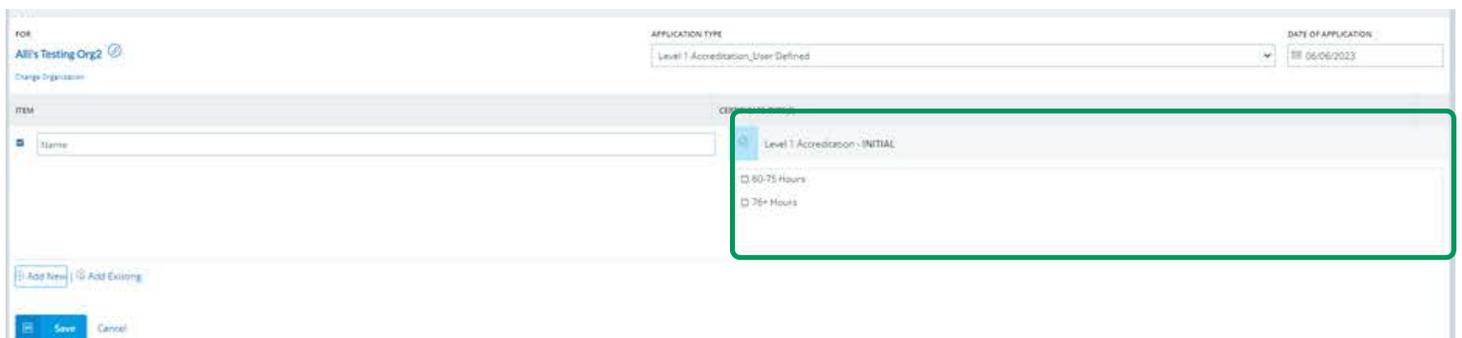
## Apply for Accreditation

Click the blue "Add New" button and enter your program name in the text box.



The screenshot shows the accreditation application form. At the top, there are fields for 'FOR' (Alli's Testing Org2), 'APPLICATION TYPE' (Level 1 Accreditation\_User Defined), and 'DATE OF APPLICATION' (06/06/2023). Below these, there is a table with columns 'ITEM' and 'CERTIFICATE TYPE(S)'. The 'ITEM' column has a text input field labeled 'Name', which is highlighted with a green box. The 'CERTIFICATE TYPE(S)' column shows 'Level 1 Accreditation - INITIAL' and two radio button options: '60-75 Hours' and '75+ Hours'. At the bottom left, there are buttons for 'Add New' and 'Add Existing'.

For all Level 1, Level 2, CCE, and CCE renewal applications, you will also need to select the Scope of Hours to identify the total number of hours for your program. Select "Save".



The screenshot shows the accreditation application form. At the top, there are fields for 'FOR' (Alli's Testing Org2), 'APPLICATION TYPE' (Level 1 Accreditation\_User Defined), and 'DATE OF APPLICATION' (06/06/2023). Below these, there is a table with columns 'ITEM' and 'CERTIFICATE TYPE(S)'. The 'ITEM' column has a text input field labeled 'Name'. The 'CERTIFICATE TYPE(S)' column shows 'Level 1 Accreditation - INITIAL' and two radio button options: '60-75 Hours' and '75+ Hours'. At the bottom left, there are buttons for 'Add New', 'Add Existing', 'Save', and 'Cancel'. The 'Save' button is highlighted with a green box.

Select "Submit." This will notify ICF staff that you are interested in applying, and they will assign the application to you. This may take up to 72 hours.



The screenshot shows the accreditation application form. At the top, there are fields for 'FOR' (Alli's Testing Org2), 'COORDINATOR' (Level 1 Accreditation\_User Defined), 'STATUS' (Open), and 'DATE OF APPLICATION' (06/06/2023). Below these, there are tabs for 'Certifications', 'Application Info', 'Processes', 'Artifacts', and 'History'. The 'Application Info' tab is selected. Below the tabs, there is a table with columns 'ITEM' and 'CERTIFICATE TYPE(S)'. The 'ITEM' column has a text input field labeled 'Test Program ABC'. The 'CERTIFICATE TYPE(S)' column shows 'Level 1 Accreditation - INITIAL' and a radio button option: '60-75 Hours'. At the bottom right, there is a blue 'Submit' button, which is highlighted with a green box.

# Accreditation Process

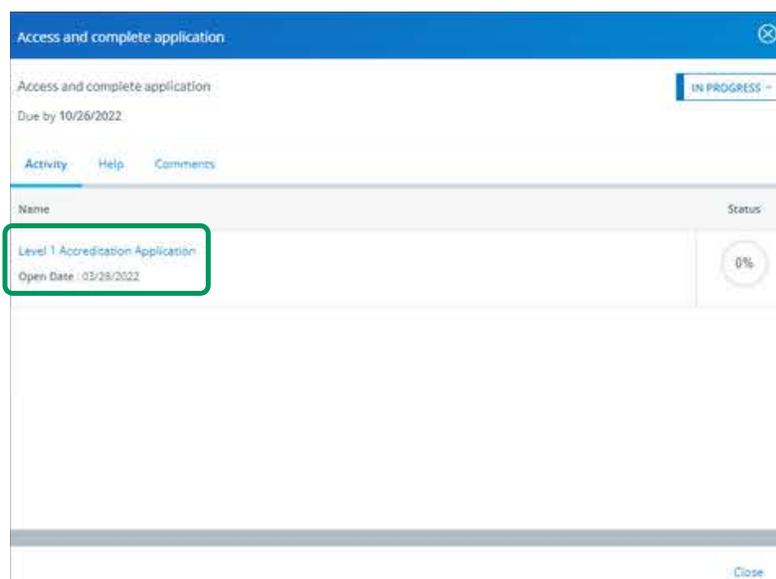
## Access and Complete Application

You will be notified via email when your application is ready. Log back into the Accreditation Portal to view and complete your application.

When you open the application, you will see that you now have access to two items: Complete the Application and Make a Payment. These are found under the **Activities** tab.



Select "Complete Application" to access the application. Select the application you have been assigned. Please notify your accreditation excellence manager as soon as possible if the application assigned to you is not the application you were expecting.



# Accreditation Process

Selecting your application will bring you into the instrument (form) to complete. You will need to complete the entire application before submitting, but can move through the application to various standards at your discretion.

**Note:** Any individual listed as a trusted contact for your organization will have access to your application. We recommend having one person updating the application at a time to eliminate confusion as you are completing the application.

The progress bars on the side of the screen will help identify the sections you have completed as well as those that require additional information.

At the bottom of the screen, you will see buttons labeled "Next," "Save," and "Submit."

**Next:** This button moves you to the next page of the application.

**Save:** This button saves your progress as you move through the application. We recommend that you save each page before moving on to the next standard to ensure you do not lose information.

**Submit:** This button allows you to submit your application to ICF staff for review. Please note that you must complete the entire application before you will be able to submit.

# Accreditation Process

Once you have completed all standard areas of the application, select "Submit."

Level 1 Accreditation Application  
Alli's Coaching Company

Standard Seven: Assessment, Evaluation & Effectiveness

ICF-accredited providers will establish a baseline for quality that satisfied the perspective from both the participant and the participant's consumers. This baseline will be reported to the ICF through a series of self-study surveys released every six (6) months.

Q-2916  
Concern that you understand there will be more to do:  
 I concur.

Progress: Documents: Filters:

- 100% Welcome
- 100% Standard One: Mission/Vision of Education Learning Program
- 100% Standard Two: Administration, Organization & Business Operations
- 100% Standard Three: Ethics, Integrity & Transparency
- 100% Standard Four: Education & Training
- 100% Standard Five: Teaching & Instruction
- 100% Standard Six: Learning Experience & Support
- 100% Standard Seven: Assessment, Evaluation & Effectiveness

PREV. NEXT

Save Submit

Return to your application process by selecting the "Applications" tab at the top of your screen. Select the application you submitted by clicking on it.

Home Profile Demographics Contacts Structure Applications Certifications Processes Assessments Issues Standards Instruments Documents Programs History

Alli's Coaching Company

Applications

Search... AP

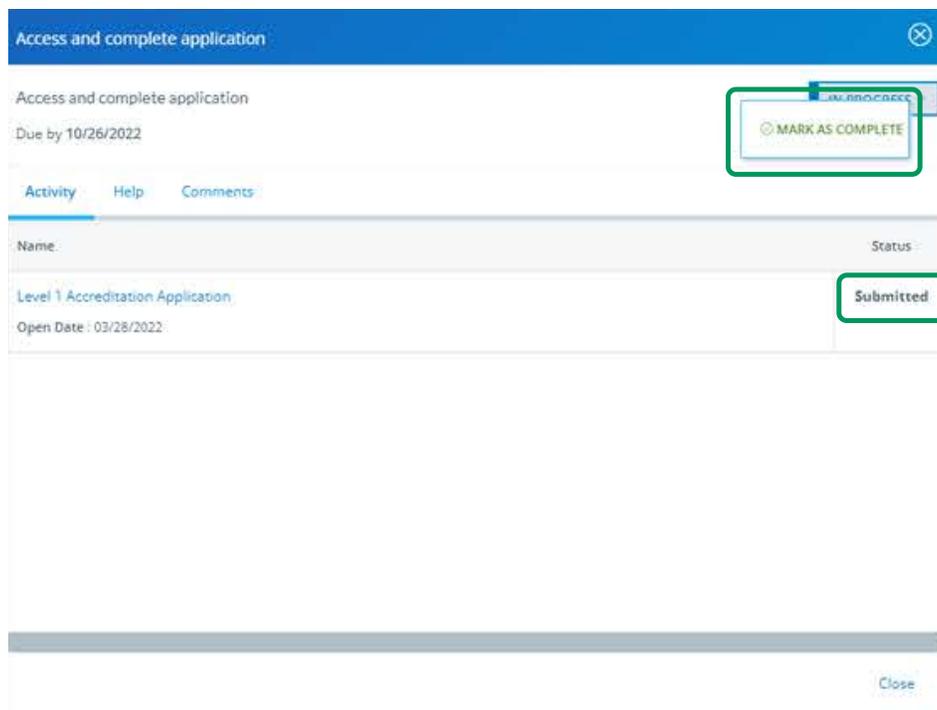
Application	Type	Status	Create	Submitted
APP-27	Level 1 Accreditation	Submitted	09/26/2022	09/26/2022
APP-26	Level 2 Accreditation	Pre-submitted	09/22/2022	
APP-25	Level 1 Accreditation	Submitted	09/21/2022	09/21/2022
APP-24	CCE Accreditation	Pre-submitted	09/14/2022	
APP-23	Level 2 Accreditation	Pre-submitted	09/14/2022	
APP-19	Level 3 Accreditation	Pre-submitted	09/14/2022	

# Accreditation Process

Verify that the application shows as submitted. Click the Activities tab, and then click the "Access and Complete Application" button.



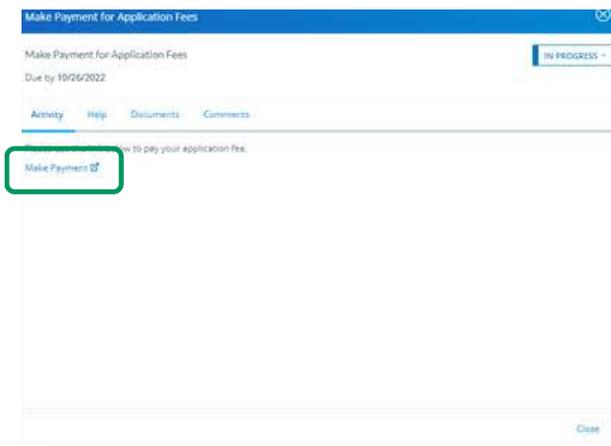
Mark the item as "Complete."



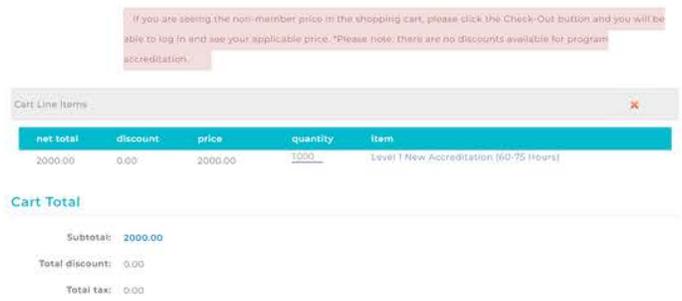
# Accreditation Process

## Make Payment

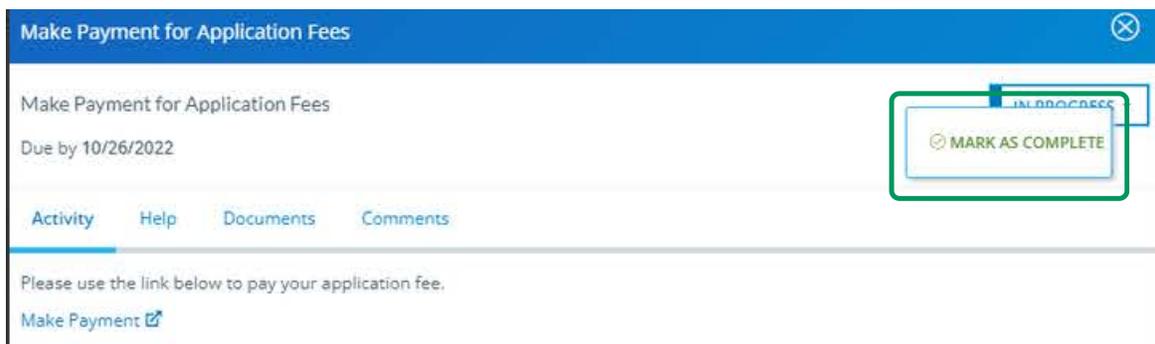
Next, click on the "Make a Payment" button to complete your application payment. This will redirect you to the ICF Shopping Cart. Follow the steps on the screen to complete the form, and select "Submit."



## Online Store Shopping Cart



Return to the Accreditation Portal and mark your payment as "Complete." Once marked as complete, ICF staff will receive a notification that your application has been submitted for review.

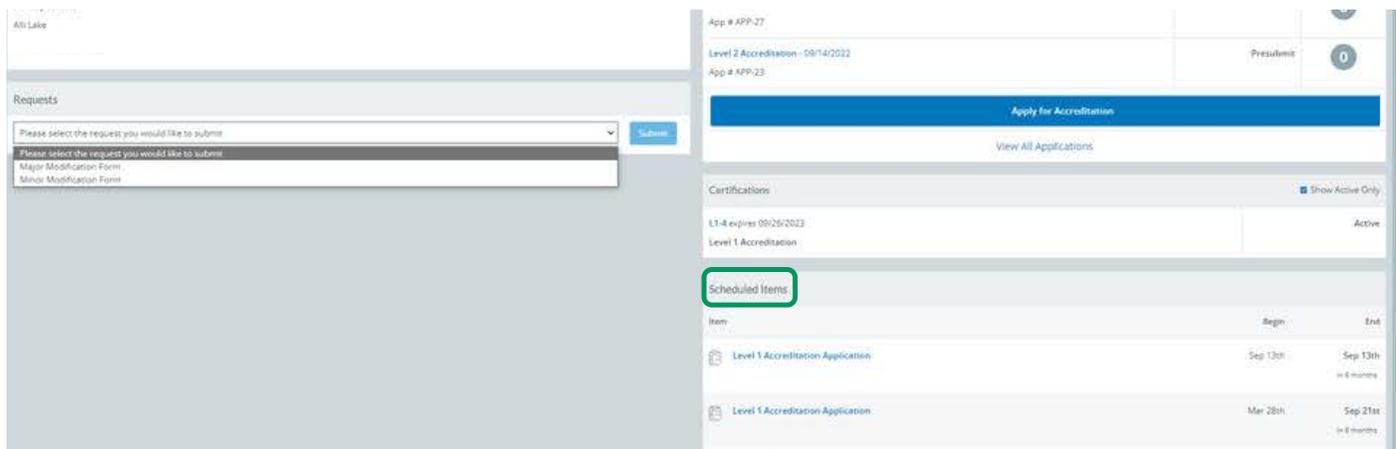


# Accreditation Process

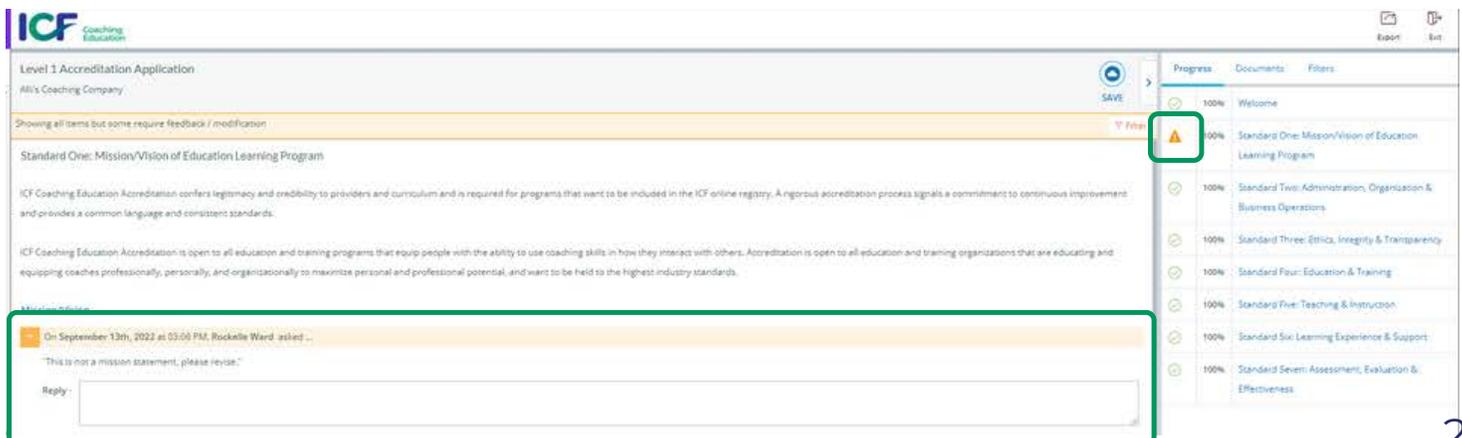
## Communicate with ICF Staff

Throughout the review process, your accreditation excellence manager may leave comments or questions in your application. You will receive an email notification if comments are submitted. Navigate to the Accreditation Portal to view and respond to comments, upload additional documentation, and communicate with your Accreditation Excellence Manager.

When you log back into the portal, you will see the tasks which require attention listed under "Scheduled Items." Click this application to view the requested changes.



Each item which requires changes will be highlighted in orange on both the progress bar and within the application. You can click the item to view comments and reply directly to ICF staff.



# Accreditation Process

Once all changes have been made, you can "Submit Changes" to send the application back to ICF staff for additional review.

The screenshot shows the ICF Coaching Education Level 1 Accreditation Application interface. The main content area contains a form with sections for 'Mission/Vision', 'Please document the following', and 'Indicate consent'. A 'Submit Changes' button is highlighted in the bottom right corner. The right sidebar shows a progress bar with 100% completion for various standards.

Progress	Documents	Filters
100%		Welcome
100%		Standard One: Mission/Vision of Education Learning Program
100%		Standard Two: Administration, Organization & Business Operations
100%		Standard Three: Ethics, Integrity & Transparency
100%		Standard Four: Education & Training
100%		Standard Five: Teaching & Instruction
100%		Standard Six: Learning Experience & Support
100%		Standard Seven: Assessment, Evaluation & Effectiveness

## Accreditation Approval

Once ICF staff have reviewed your application, you will receive a notification of your application status (Approved or Denied). You will now be able to see your accreditation listed on your Dashboard under Certifications on the right-hand side of the screen.

The screenshot shows the ICF Coaching Education dashboard. The 'Home' tab is selected. The 'Active Applications' section shows three submitted applications. The 'Certifications' section shows one active certification, 'L1-4 expires 09/25/2023', which is highlighted with a green box.

Active Applications	Submitted
Level 1 Accreditation - 09/26/2022 App # APP-27	0
Level 1 Accreditation - 09/21/2022 App # APP-25	0
Level 2 Accreditation - 09/14/2022 App # APP-23	0

Certifications	Show Active Only
L1-4 expires 09/25/2023 Level 1 Accreditation	Active

# Accreditation Process

## Updating Your Accreditation

To request changes to your accreditation, select the appropriate change from the drop down menu under "Requests." Select "Submit."

The screenshot shows the ICF Coaching Education portal. The 'Requests' dropdown menu is highlighted with a green box. The dropdown options are: 'Please select the request you would like to submit', 'Major Modification Form', and 'Minor Modification Form'. The 'Submit' button is also visible next to the dropdown.

Complete the information in the pop-up box and select "Submit." You also have the option to save and return later to complete the form.

Once submitted, the request to update will be sent to your Accreditation Excellence Manager for review.

The screenshot shows the 'Edit Form' pop-up box for a Major Modification Form. The form includes the following fields and options:

- Thank you for indicating your interest in updating your ICF accreditation records. This form will allow you to update the following areas for ICF staff review:
  - Organization policy documents
  - Add/Remove accredited participant contact hours
  - Faculty List
- Please select the accreditation you would like to submit updates for:
  - Select an option...
- Program Name:
  -
- Do you wish to update one or more of your organization's policy documents previously submitted?:
  - Select an option...
- Are you updating your participant contact hours?:
  - Select an option...
- Are you offering any new courses within the accredited program?:
  - Select an option...
- Total Synonymous hours/oversee:
- Total Accredited hours/oversee:
- Total Core Competency related training:
- Total Resources Developed:
- Buttons: Save, Submit, Abandon

# Additional Information

## Glossary & Icons



### Dashboard:

Click this icon to return to your dashboard at any time.



### Organizations, People, Programs & Groups:

Search for organizations, individuals, or specific programs.



### Issues:

View and resolve all issues with processes & applications.



### Instruments:

This is the application that providers will fill out to become accredited. Also referred to as accreditation application.



### Processes:

Each accreditation type has a specific process, similar to a checklist. This is where you can check the progress of your accreditation and determine what steps you might be missing.



### Documents:

Upload and review documents.



### Notifications:

All notifications will appear at this icon in the top right corner of the screen.

# Additional Information

## Contact ICF Staff

ICF Support: [support@coachingfederation.org](mailto:support@coachingfederation.org)

### Accreditation Staff:

Rockelle Ward - Director of Global Accreditation

Maria Lester - Global CCE Manager

### Accreditation Excellence Managers:

Leslie Cavin- Asia Pacific & Oceania

Cody Cioffe - Europe, Middle East, & Africa

Mariela Tirado Rivera - North America, Latin America, & Caribbean

All accreditation excellence managers can be reached by emailing [support@coachingfederation.org](mailto:support@coachingfederation.org).

### Looking for additional resources? Visit the Global Knowledge Community.

The ICF Coaching Education Global Knowledge Community (GKC) is a virtual venue for ICF accredited coach educators, trainers, and organizations to share resources, discuss leading practices in coaching education, and connect with other coach educators around the world.

Not sure how to access the GKC? Visit

<https://engage.coachingfederation.org/coachingeducation>