

GUIDE

Assessment Platform

Counsellor user guide



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First step

If you act as a counsellor, this is also the place you will review and sign off your candidate's progress.

Follow this guide on how to use the Assessment Platform.

NAVIGATION

English

Welcome Scott Summers

RICS D365 - SAT - Assessment Platform Training manager home

Name	Email	Phone Number	Last Logged In	
Elizabeth Braddock	ElizabethBraddock@rics.org	+44 1234 56798	12/09/2022	Show More...
James Howlett	JamesHowlett@rics.org	+49 1234658796	13/09/2022	Show More...
Jean Elaine Grey	JeanElaineGrey@RICS.ORG	+971 775 4 69048	05/07/2022	Show More...

Navigating ARC

The areas of the Assessment Platform can be accessed from the homepage or the navigation bar.

01 Profile and help

Click the dropdown arrow to edit your profile details. You can also switch your platform view (see 3 below). Click the question mark to access help and download this guide.

02 Navigation bar

Hover the cursor over the navigation bar and it will expand to show you all areas of the platform. Click the RICS logo to return to the homepage from any screen.

03 Switch view

If you act as an assessor and a counsellor, you can switch your view to access your candidates as a counsellor or your assessments as an assessor.

PROFILE

- View Profile
- Edit Profile
- View My Candidates
- View My Assessments
- View My Approvers Requests
- Log out

PROFILE



Lucas Bishop

2

Phone Number
012345697



Mobile
+44 1234679



Email
LucasBishop@Rics.org

3

Academic Qualifications

Professional Qualifications

Primary Employment

Company Name	Job Title	Start Date	End Date
Vokes and Co	Surveyor	01/01/2018	
Address GB	Postcode B1 1AA	Phone 07712365489	

Employment History

Location

123
Ashley Street
Birmingham
GB
B16 8GZ



7960312
Professional Number

Profile view

The profile view displays information about you.

01 Your profile photo, name and honours

02 Your contact details

03 Your personal address

04 The academic qualifications, professional qualifications and employment history you have recorded

Personal

Employment History

Academic Qualifications

Professional Qualifications

Personal Details

Profile Photo Upload

1

Please upload a current picture, then press the Save button at the bottom of the page to attach the photo to your profile.
Please upload a current, high quality, picture of yourself that is no more than 2MB.

Browse

First Name
Lucas

Last Name
Bishop

Honours

FRICS

2

Personal Address

To search for an address, just start typing in the Address Line 1 or Postcode fields.

Address Line 1

123

3

Address Line 2

Ashley Street

Phone Number

(Telephone numbers should start with a + sign, followed by the country code and national number)

012345697

4

Mobile

+44 1234679

Email

LucasBishop@Rics.org

5

Profile edit — personal

You can insert and edit the following personal details:

- 01 Profile photo
- 02 Honours
- 03 Personal address
- 04 Phone numbers
- 05 Email address

Any changes you make will automatically update the central RICS database. There is no need to contact RICS with these changes.

To amend your name, you will need to contact your local RICS office.

Employment Details

+ New ¹

Current Employer

Vokes and Co

Primary Employment ²

Job Title

Surveyor

Phone Number

Start Date

EndDate

Work Experience

Please enter your work experience

Cancel Save

Profile edit — employment history

You can add your employment history and edit your current employer details.

01 Click to add a new employment entry

02 Indicates your primary employment

Note: adding a new employment entry will automatically default it to your primary employment. You can change this by clicking the slider.

PROFILE

New Employment Entry

Country

 3

Postcode

Lookup

Company

 5

Primary Employment

If you cannot find your company listed, [click here](#). Only enter experience related to your pathway. Your request will be reviewed by RICS staff within 5 working days so please check the RICS Assessment Platform after this time. You can continue to enter any other employment history.

Job Title

 4

Phone Number

 5

Start Date

 6

EndDate

Cancel

Save

Profile edit — employment history

You can find your employer on the RICS database.

03 Enter the country and then postcode or city as prompted. Click 'Look up' and select your company from the list.

Note: if your employment details are not listed, you will need to contact your local RICS office to update them.

04 Enter your job title

05 Enter your telephone number (if current employer)

06 Enter your start date and end date (if not current employer)

PROFILE

Academic Qualifications Details

+ New

Latest Academic Qualification

Institution: Coventry University

Course: QS and Construction

Qualification: Degree

Start Date: 01/01/2017

End Date: 01/07/2019

Cancel Save

NEW ACADEMIC QUALIFICATION ENTRY

New Academic Qualification

Institution: Please enter...

Course: Please enter...

Qualification: Please enter...

Start Date: dd/mm/yyyy

Completion Date: dd/mm/yyyy

Cancel Save

Edit profile — academic qualifications

The academic qualifications you entered when you completed your enrolment will be displayed. To add a new academic qualification, click 'New'.

Enter the qualification details. Click 'Reset' to clear your entries. Click 'Save' to add the qualification to your profile.

The screenshot shows a navigation bar with four tabs: 'Personal', 'Employment History', 'Academic Qualifications', and 'Professional Qualifications'. The 'Professional Qualifications' tab is active and highlighted in purple. Below the navigation bar, the title 'Professional Qualifications' is centered. A green '+ New' button is positioned in the center of the main content area.

Edit profile — professional qualifications

The professional qualifications you entered when you completed your enrolment will be displayed (if required). To add a new professional qualification, click 'New'.

The form is titled 'NEW PROFESSIONAL QUALIFICATION ENTRY'. It contains the following fields and controls:

- Organisation/Establishment:** A dropdown menu.
- Current Grade:** A dropdown menu.
- Year Gained:** A text input field containing the value '2022'.
- Buttons:** 'Cancel' (orange) and 'Save' (green) buttons at the bottom.

Enter the qualification details. Click 'Reset' to clear your entries. Click 'Save' to add the qualification to your profile.

MESSAGES

Inbox

The screenshot shows an inbox with three messages. At the top, there are two summary boxes: 'Total 13' (with a callout '1') and 'Unread 13' (with a callout '2'). The first message, dated 06 July 2022, has the title 'A Case Study is ready for review' (callout '3') and a 'Mark as read' button (callout '4'). A dropdown arrow (callout '5') is visible next to it. The second message, also dated 06 July 2022, has the title 'Summaries of Experience are ready for review'. The third message, dated 05 July 2022, has the title 'A Case Study is ready for review'. To the right, a 'Need Help?' sidebar (callout '6') contains a 'Counsellors' User Guide' link, a phone number '+44 (0)24 7686 8555 Opening hours 09:00 - 17:00 GMT', and an email address 'contactrics@rics.org' with the text 'We aim to answer all queries promptly within 2 working days'.

Messages

We will contact you through the platform with key messages as you progress with your assessment.

01 Total messages

The total number of messages you have received.

02 Unread messages

The total number of unread messages.

03 Title

The title of the message.

04 Mark as read

When you select a message, it will be marked as read.

05 Message content

Use the dropdown arrow to open and close the message content.

06 Help

Access contact details for your local RICS office and the platform user guide.

English
Welcome Erik Lehnsherr

D365 - SAT - Assessment Platform
Counsellor Home

1. Counsellors must complete the Counsellor Training module on the RICS Online Academy. If you have not done so, please click the button to take the course. If you have just completed the course, please be aware that your Completed status is not updated in the system immediately and it may take up to an hour for this to happen. Thank you for your patience.

[Counsellor Training](#)

	Name	Email	Phone Number	Last Logged In	
2		Elizabeth Braddock	+44 1234 56798	10/06/2022	3
		Henry McCoy	+44 466080840	10/06/2022	1

Company
Lucie Atterbury consulting

Title
Surveyor

Pathway
Commercial Real Estate

Expected Final Date
not set

[Show More...](#)

★ CPD	4	Completed	⚙️ Competencies Selected	Completed
🕒 Professionalism Module (Expires: 07/06/2023)		Completed	📁 Case Study	Started
📅 Employment History			👤 Approve Candidate	Not Approved
📅 Employment History			👤 Approve Candidate	5 Not Approved

APPROVE CANDIDATE

When you are satisfied that, to the best of your knowledge, this candidate has understood the requirements and this document complies with RICS guidance, please click submit approval. By doing this you are also confirming that the content of this submission is a true representation of the candidates own, unaided work and involvement in the project. Please note that the case study must be a maximum word count, as stated within the relevant assessment guide; should the total be more than the maximum you need to reject the submission for amendments to be made to the contents.

Submit approval 6

Home

The homepage allows you to see the progress of your candidates and reach the key areas of your counsellor functions.

01 Counsellor training

Access to a counsellor training module is available, if you are a new counsellor or wish to refresh your understanding of the role.

02 Candidate banners

Each banner represents a candidate you are counselling. You can view name, email, phone number and the date of each candidate's last log into the platform. Click on the banner to access more information on a candidate.

03 Approval notifications

The icons in the banner indicate what elements of the submission the candidate has requested you to review: summary of experience for each competency; case study; final submission.

04 Candidate progress tracker

The candidate's progress against key elements of the assessment journey is indicated. You can view the competencies selected and case study. Click on the appropriate coloured button to access those elements.

05 Final assessment approval

When all a candidate's elements are complete (shown by green buttons), you must approve the candidate for final assessment. Click the 'Not Approved' button to change the status to 'Approved'.

06. Counsellor declaration

Read the declaration and, if satisfied, click 'Submit approval'. The candidate will be notified and the final assessment submission option will now be available to the candidate.

CaseStudy.pdf

1 Download

Feedback

2

3 Approve

Submit Feedback 4

Submission reviews

You will receive requests to review elements of a candidate's submission.

You will have a read-only view of your candidate's CPD, and will be able to see a list of the competencies they have selected.

You will be required to review and give feedback or approve the summary of experience and case study documents.

01 Download

You can download the relevant file for the summary of experience or case study for review.

02 Feedback

You can enter any feedback you wish to give to your candidate on their submitted documentation. The candidate will be able to view this when you have either approved or submitted feedback.

03 Approve

If you are satisfied that the candidate documentation meets the requirements, click here.

04 Submit feedback

If the candidate's documentation is not satisfactory, click here.

Delivering confidence

We are RICS. Everything we do is designed to effect positive change in the built and natural environments. Through our respected global standards, leading professional progression and our trusted data and insight, we promote and enforce the highest professional standards in the development and management of land, real estate, construction and infrastructure. Our work with others provides a foundation for confident markets, pioneers better places to live and work and is a force for positive social impact.

Americas, Europe, Middle East & Africa
aemea@rics.org

Asia Pacific
apac@rics.org

United Kingdom & Ireland
contactrics@rics.org