

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

2 English

1

Erik L


**RICS** SAT - Core - Assessment Platform













Counsellor Home

You have candidate approvals awaiting action.

Candidate Approvals

**New RICS Counsellor module is now available!** As an RICS counsellor, staying up to date with the assessments is essential. This latest module ensures compliance with RICS requirements and offers best-practice tips to support your candidates on their assessment journey. The course counts as 1-hour formal CPD. Once you complete the course, your status will update within an hour. Thank you for your patience.

Counsellor Training

	<b>Name</b> Elizabeth Braddock	<b>Email</b> ElizabethBraddock@rics.org	<b>Phone Number</b> 44123456798	<b>Last Logged In</b> 01/08/2025	 0  0  0 <div>Show More...</div>
	<b>Name</b> James Howlett	<b>Email</b> JamesHowlett@rics.org	<b>Phone Number</b> +49 1234658796	<b>Last Logged In</b> 	 0  0  0 <div>Show More...</div>
	<b>Name</b> Santana Lopez	<b>Email</b> Slopez@hotmail.com	<b>Phone Number</b> 07946569421	<b>Last Logged In</b> 	 0  1  0 <div>Show More...</div>

3

PROFILE

View Profile

Edit Profile

View My Candidates

View My Assessments

View My Approvers Requests

Log out

## 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

English

Welcome Lucas Bishop

 D365 - SAT - Assessment Platform


Profile




1

Lucas Bishop


2




Phone Number  
012345697





Mobile  
+44 1234679





Email  
LucasBishop@Rics.org


 Academic Qualifications




 Professional Qualifications




 Location




123  
Ashley Street  
Birmingham  
GB  
B16 8GZ


 #


7960312  
Professional Number

 Primary Employment



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

 Employment History



## 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

# PROFILE

 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

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

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

## 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.

# PROFILE

Personal

Employment History

Academic Qualifications

Professional Qualifications

Employment Details

+ New

Current Employer

Vokes and Co

Job Title

Surveyor

Phone Number

07712365489

Start Date

01/01/2018

EndDate

dd/mm/yyyy

Work Experience

Please enter your work experience

Cancel

Save

Primary Employment

## 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

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

## 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'.

**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


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




## PROFILE

 Personal

 Employment History

 Academic Qualifications

 Professional Qualifications

Professional Qualifications

+ New

## 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'.

NEW PROFESSIONAL QUALIFICATION ENTRY

New Professional Qualification Entry

Organisation/Establishment

▼

Current Grade

Year Gained

▼

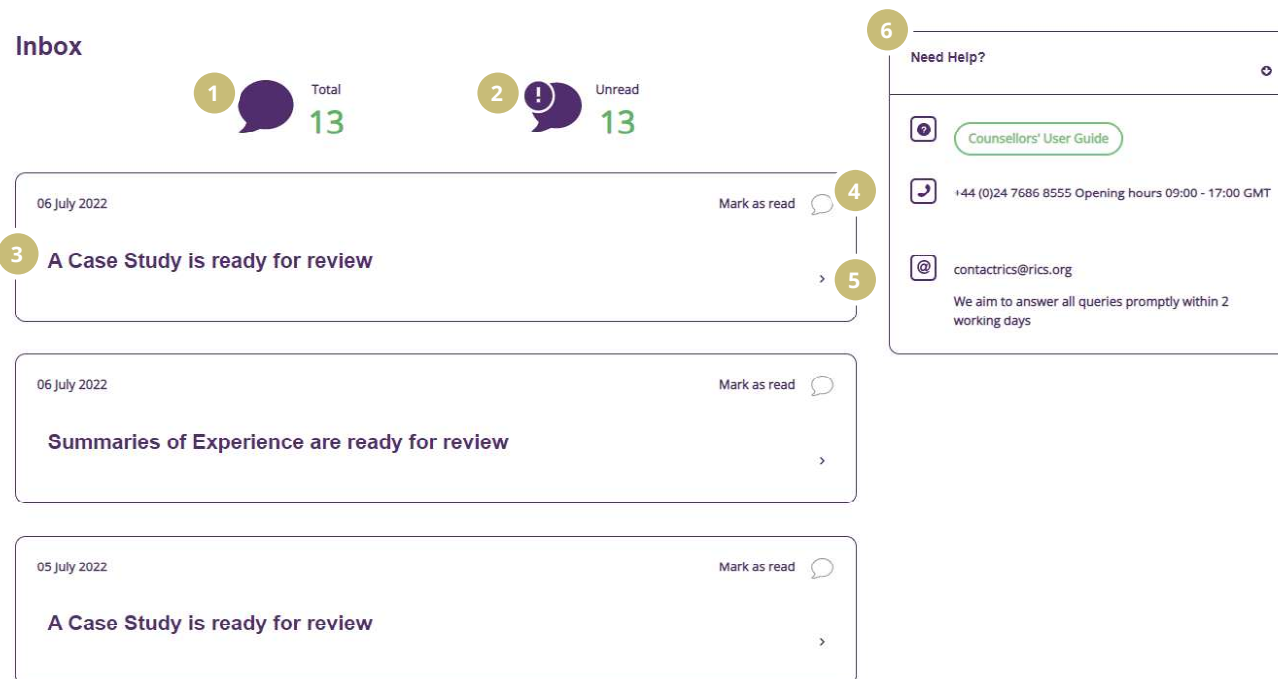
2022

Cancel

Save

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

# MESSAGES



## 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.

# COUNSELLOR

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](#)

2

	<b>Name</b> Elizabeth Braddock	<b>Email</b> ElizabethBraddock@rics.org	<b>Phone Number</b> +44 1234 56798	<b>Last Logged In</b> 10/06/2022	3 <div> </div> <a href="#">Show More...</a>
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	<b>Name</b> Ralph Smith	<b>Email</b> ralphsmithqa@rics.org	<b>Phone Number</b> +44 787988964769	<b>Last Logged In</b> 15/12/2022	<div> </div> <a href="#">Show Less...</a>
--	----------------------------	---------------------------------------	---	-------------------------------------	---

<b>Company</b> not set	<b>Title</b> not set	<b>Pathway</b> Quantity Surveying & Construction	<b>Eligible For Assessment After</b> 02/05/2023	<b>Date Application Submitted</b> 11/07/2023
---------------------------	-------------------------	---	--	---

★ CPD	4 <b>Not Started</b>	⚙️ Competencies Selected	<b>Completed</b>
🕒 Professionalism Module	<b>Not Started</b>	⚙️ Summary of Experience	<b>Completed</b>
📁 Case Study	<b>Started</b>	📅 Employment History	<b>Not Started</b>
👍 Approve Candidate	5 <b>Not Approved</b>		

**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 content.

☐
[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. You will not be able to approve or give feedback until you have downloaded the file.

### 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](mailto:aemea@rics.org)

Asia Pacific  
[apac@rics.org](mailto:apac@rics.org)

United Kingdom & Ireland  
[contactrics@rics.org](mailto:contactrics@rics.org)