NCDA CREDENTIALING

POLICY & PROCEDURES

MANUAL

NCDA Credentialing Commission | 2nd Edition – July 2023

NCDA CREDENTIALING POLICY & PROCEDURES MANUAL
2ND EDITION

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SECTION 1 – A

OPERATIONS: COMMISSION STRUCTURE & CONFIDENTIALITY

The following is covered in this section pertaining to the commission structure: Commission Overview, Commission Membership, and Commission Member Selection Process and Terms.

Commission Overview

The Commission has 3 main operating entities:
1. The Executive Team: Director, Chair, Chair Elect
2. The Entire Commission: Credential Representatives, NCDA Administrative Staff, Board Liaison, Executive Team
3. NCDA Staff: Credentialing Director and Administrative Staff

The Commission respects that information sharing is very important and has established internal transparent and open resources for Commissioners, currently housed on a DropBox account. In addition, The Commission seeks to get other entities well informed, hence members of the Executive team (individually or collectively) meet regularly with key stakeholders, particularly NCDA staff and the NCDA Board.

As an affiliate of the NCDA Board of Directors, the Commission is accountable and reports to the Board. The Board has identified 3 areas where formal Board approval must be sought:
1. Annual operating budget,
2. Appointment of Commissioners, and
3. Establishment of a new credential.

Commission Membership

- Executive Team
    - Chair (1-year term)
    - Chair-elect (1-year term succeeding to Chair) – serves as Commission Secretary
    - Director of Credentialing Administration (reports to NCDA Executive Director)
- Board Liaison (appointed annually by Board President)
- Commissioners
    - Certified Career Services Provider - CCSP (3-year term)
    - Certified Career Counselor - CCC (3-year term)
    - Certified Master of Career Services - CMCS (3-year term)
    - Certified Clinical Supervisor of Career Counselors or any subsequent revision to this supervisory credential – CCSCC or equivalent replacement (3-year term)
    - Certified School Career Development Advisor - CSCDA (3-year term)
    - Ad Hoc Member-at-Large (1-year term, renewable annually for up to 3 years)
- NCDA Administration Staff

Commission Member Selection Process and Terms

Selection of NCDA Credentialing Commissioners, Chair, and Chair-Elect
- NCDA will announce Commission vacancies and solicit applicants through administrative staff
- The Commission elects its own Chair and Chair-elect as outlined in the Policy and Procedures handbook
- The Commission will vet, interview, and select a new Commissioner, Chair, and Chair-elect. The names of these individuals will be sent to the NCDA Board for approval.

Terms for Commissioners
- Each Commissioner term will be for 3-years
- Commissioners can serve 2 consecutive terms
- After a break in term, a commissioner can apply again

Terms for Chair and Chair-elect
- Beginning October 1, 2019, the Chair will serve a single one-year term.
- The Chair-elect will serve a one-year term in that role and then the following year become Chair of the Commission.
- Only current or past Commissioners are eligible for nomination to Chair-elect
- An individual nominated for Chair-elect may or may not have immediately served 2 consecutive terms as a credential commissioner

<u>Confidentiality</u>

All members of the NCDA Credentialing Commission, credential reviewers, audit committee volunteers, and any other work committee members or volunteers will be required to complete the NCDA Confidentiality Agreement before receiving access to proprietary Commission information.

SECTION 1 – B

OPERATIONS: EXECUTIVE TEAM ROLES

Primary duties of Executive Team

- Oversee operations of the Commission (primarily Director and Administrative Staff)
- Work with key external stakeholders (i.e. Board, TEC, Coalition, international community, emerging markets, members and other NCDA standing committees or professional associations)
- Plan and set budget to be sent to Commission and then to the Board for approval
- Work in partnership with the Commission to accomplish work related to NCDA credentialing
- Establish and monitor all Advisory Taskforces:
    a) The Chair will establish Advisory Taskforces, set charge, timelines, and deliverables and appoint a chair for the Taskforce, in conjunction with the Executive Team.
    b) Taskforces are of 2 types: Credential-specific or administrative (Commission operations).
        o Credential-specific taskforces will most likely include external SMEs.
        o Administrative taskforces may include external stakeholders along with Commission reps.
    c) Administrative taskforces: After completing a) above, and before beginning any work, the Commission will discuss the charge of an administrative taskforce, seeking parameters, and ideas. Once the administrative Taskforce is finished, the group will present its findings and recommendations to the Commission for approval and action.
    d) Credentialing taskforces must work within current Commission operations. Any deviations from operational practices must seek Commission approval.

SECTION 1 – C

OPERATIONS: COMMISSIONER ROLES

Primary duties of a Commissioner

- Read materials and prepare in advance for meetings (files stored in DropBox)
    - Ensure access to DropBox on personal computer; Director may assist with obtaining file access through supporting DropBox account purchases as necessary
- Respond to email requests within 3 business days
- Credential Representative responsibilities:
    - Start up and maintenance of a new credential
    - Establish credential eligibility criteria
    - Reviewer selection, oversight, training to include a regularly revised Reviewer Training Manual
    - Create, review, and revise Assessment and Grading rubrics as necessary
    - Manage credential and/or assessment pilots
    - Author, review, and revise applicant Study Guides as necessary
    - Serve as primary POC concerning unique questions and/or as 3rd reviewer
    - Application information
    - Oversee and maintain accurate information on NCDA Credentialing website
- Assist in administrative duties impacting Commission operations
- Participate in administrative or Credential taskforces
    - Identify needs and concerns from stakeholders to be bought forward
    - When asked, act as Commission representative at staff and other stakeholder meetings.

SECTION 1 – D

OPERATIONS: NCDA STAFF ROLES

Primary duties of NCDA Staff (Director and Administrative Staff)

- Handle administrative responsibilities related to role:
  - Obtain, circulate, and save monthly reports on DropBox, to include monthly budget, monthly credentialing report, and any additional reporting needs added by Executive Team
- Research and draft budget
- Oversee Alternative Pathway applications, implementations, and renewals while consulting with Executive Team on decision points
  - New Alternative Pathways must be voted upon by Executive Team and Board Liaison before implementation
- Lead credentialing software selection processes, implementations, conversions, and ongoing software maintenance needs (currently SMApply)
  - Any software selection processes must include the Commission Chair's attendance at all vendor meetings
- Bring NCDA Board requests to the Commission for consideration and voting, and respond to the Board as necessary
- Lead selection processes and implementations for additional Commission vendors in conjunction with Executive Team and/or appropriate Commissioner
- Point of contact for most inquiries (phone, web, etc.)
  - at times Executive Team may be consulted
- Work with Commission being actively involved in live and virtual meetings, read materials, and participate in discussion and decision making
- Identify needs and concerns from stakeholders to be brought forward
- Act as Commission representative at staff and other stakeholder meetings

SECTION 1 – E

OPERATIONS: MEETING SCHEDULE

Meeting Schedule

The Commission meets face-to-face 3 times a year:
- In conjunction with the fall NCDA CPI Conference (1-2 days preceding CPI)
- In conjunction with the winter/spring NCDA CPI Conference (1-2 days preceding CPI)
- In conjunction with the June NCDA Global Conference (1-2 days preceding conference – day before & including PDI day)

Domestic travel expenses to the fall and winter/spring CPI meetings will be covered by the association. Travel expenses to and during the June Global Conference are the responsibility of individual commissioners.

In addition, the Commission meets virtually via videoconference every 4 – 6 weeks depending on needs. We frequently communicate and make decisions via email.

SECTION 2 – A

CREDENTIAL DEVELOPMENT: ADDING A NEW CREDENTIAL

SECTION 1: Advisory Team Members
Commission Liaison:
Team Lead:
Team Members:

SECTION 2: Target Population and Need
Description of what need this credential will serve for professionals/providers and the public

Estimate of anticipated # of applicants per year:

SECTION 3: Descriptive Information
Brief description: *a credential for WHO from BACKGROUND working in SETTINGS, to deliver services and demonstrate core competencies in a SPECIFIC AREA.*

Proposed name and abbreviation (all begin with certified):

Detailed description*: Answer these 2 questions:*
- What is the NAME OF CREDENTIAL HERE™ (its abbreviation here) credential?
  - **Sample:**   The credential is intended for providers offering career services in an array of roles and settings; such as consultants, coaches, advisors, workforce practitioners, facilitators, trainers, recruiters, and resume writers. This multi-purpose credential includes demonstration of competence in the essential skills needed to provide career services in any setting. It is appropriate to all levels and all settings. It is aligned with the current 12 competencies addressed by NCDA's *Facilitating Career Development* curriculum. Completion of this training program is required before applying. Specific levels of educational attainment and work experience are not required.

- Who is eligible for this credential?
  - **Sample:**   Currently, those who have completed training using NCDA's *Facilitating Career Development* curriculum are eligible to apply. After December 31, 2018, only a 2017 or later version of NCDA's *Facilitating Career Development* curriculum will be accepted to apply for the credential. If you completed a training program based on NCDA's Facilitating Career Development curriculum published before 2017, you have until December 31, 2018 to apply for the CCSP. After that date, you will need to have completed the most NCDA's Facilitating Career Development training with the 2017 or later curriculum.

FAQ Information (topics to be covered – **Sample** below from CCSP):
- [What is the Certified Career Services Provider™ (CCSP) credential?](#)

- [How does the CCSP differ from the GCDF?](#)
- [Who is eligible for the CCSP?](#)
- [I have a GCDF. How can I get a CCSP?](#)
- [I have already completed NCDA's Facilitating Career Development training. Can I get a CCSP?](#)
- [I have not completed NCDA's Facilitating Career Development training. How can I get a CCSP?](#)
- [What are the steps to apply for the CCSP?](#)
- [How much time do I have to finish the application?](#)
- [What if I don't pass?](#)
- [How can I prepare for the assessment portion of the application?](#)
- [How do I keep my credential up-to-date?](#)
- [How do I find continuing education relevant to career development?](#)
- [What do I need to know to use the application software?](#)
- [I'm Ready! How can I apply for the CCSP?](#)

SECTION 4: Define the Competencies that will be assessed
List the competencies and a brief definition of each. Reviewing some of the other credentials can be helpful.

SECTION 5: Specify Applicant Eligibility Information
Define applicant criteria for application:
- Minimum education level
- Are specific courses, majors, or degrees required? (If so, define)
- Is there a minimum level of experience in a particular area required? (if so, define how much & any specific experiential requirements)
- Is there any other training required? (If so, define)
- What evidence does an applicant have to supply to be eligible to gain the credential? (transcripts, certificate of completion of training, documented experience in relation to competencies)
- Will there be any "fast-track" for this credential? If so, please describe in detail.

By Commission policy, fast track options must meet the following criteria:
   a.   The applicant must have a current credential in good standing.
   b.   The credential must still exist.
   c.   The application process for the credential must have included an assessment component.
   d.   Fast track options are generally time limited.

SECTION 6: Develop Assessment and Grading Rubric
Develop assessment
- By what means does someone demonstrate the competencies (references, case study)?
- How are the competencies mapped to the demonstration of them?

- How are the competencies measured?
- How is data gathered about results?

Develop Grading rubric
- How does the grading rubric align to the case study content and the case study question/prompt?

What are policies for re-test/re-apply?

SECTION 7: Recruit and Train Reviewers

We recommend an initial reviewer pool of 4-7 individuals. Additional reviewers can be recruited as needed. Reviewers must qualify for the credential and will be expected to complete the application and case studies (without charge).
- Recruit reviewers
- Develop and conduct training

Training should include understanding competencies, case studies, grading rubrics, and the logistics of using SMAPPLY software.

SECTION 8: Plan and Execute Pilot and Revise Assessment/Rubric

We recommend 1-3 pilots of about 8-10 individuals in each pilot. All reviewers (recommend at least 4 reviewers) review each applicant in the 1st pilot. Using reviewer feedback and report from SMApply, the leadership team can determine alignment among case study presentation, questions, and grading rubrics. After each pilot, revisions may be made in any of the 3 above.

Conduct debriefings following each pilot with reviewers concerning process and alignment of case study content, question, and grading rubrics and retest procedures.

SECTION 9: Continue Monitoring During Extended Pilot (up to 25-100 applicants)

Pay attention to consistent low ratings of a case study or what is happening with reviewer consistency. Until 25-100 applicants have been processed, 2 reviewers will be assigned to review each application.

SECTION 10: Marketing and Continuing Education

What is the initial recommendation for the continuing education requirements for renewal of this credential (over a 3 year term)?

What current providers/vendors are available to meet the CE requirements?

To what organizations, professionals, etc. would you immediately market this credential?

SECTION 2 – B

CREDENTIAL DEVELOPMENT: OFFERING A FAST TRACK FOR A CREDENTIAL

A "fast track" is a time-limited opportunity for qualifying applicants to earn an NCDA credential without undergoing the typical assessment process for the credential with a fast track.

Any fast track proposals must be presented to the NCDA Credentialing Commission for review at least 30 days in advance of a Commission vote. Following a yes vote by the Commission, the fast track proposal will then be presented to the NCDA Board for approval. Fast tracks can only be implemented following a majority yes vote by the Commission and NCDA Board, and should be implemented at the start of the NCDA fiscal year (October 1).

Fast track proposals must include the following justification as presented in the sample proposal below:

> **FAST TRACK Option for The Certified Master of Career Services (CMCS) Credential**
>
> **Audience:**
> - Professionals who have earned and currently hold a professional coaching credential recognized by one of the two major credentialing bodies for coaches recognized in the USA and have specialized in the delivery of coaching in the career development/services sector (career coaches, executive coaches, leadership coaches, student success coaches, talent development coaches)
> - These professionals will be coaches holding the Master Certified Coach (MCC) or Professional Certified Coach (PCC) from the International Coach Federation (ICF) or those holding the Board Certified Coach (BCC) from the Center for Credentialing and Education Inc.
>
> **Objectives:**
> 1. To recognize the contributions of highly experienced, credentialed coaches who specialize in career coaching (some of whom are already members of NCDA)
> 2. To attract highly experienced, credentialed coaches to the CMCS credential, thereby expanding the awareness of and interest in the CMCS
> 3. To attract highly experienced, credentialed coaches to NCDA membership
> 4. To increase the number of CMCS holders as a service to the public, who may be seeking a reputable and informed career coach through NCDA but unable to find one in their local area
> 5. To address the consistent question to the CC from NCDA members, "where is your coaching credential?"

Core Eligibility for CMCS Credential

▪ Applicants must meet core eligibility requirements [Graduate degree + 5 years of full-time related work experience OR Bachelor's degree + 7 years of related full-time work experience]

Eligibility for Fast Track to the CMCS

1. Hold a valid or current coaching certification from ICF or CCE, Inc. (MCC, PCC, BCC)
2. Document sixty (60) continuing education (CE) contact hours (per the current NCDA CE Manual) within the past seven (7) years in career development, career coaching, resume writing, job search, workforce development, and/or leadership development. CE hours earned for general coaching skill development are not eligible.
   a. Completion of NCDA's Facilitating Career Development (FCD) course will meet the full sixty (60) CE requirement. Certificate must be provided.
   b. Completion of a 3-credit hour university career counseling or career development theory course will provide thirty (30) CE contact hours. Transcript must be provided.
   c. At least forty (40) hours must consist of core skill development in career readiness, career development, career coaching, and/or career transition and job search. Certificate/s must be provided.
   d. A maximum of twenty (20) hours will be counted from resume writing, organizational development, learning and development, or leadership development courses. Certificate/s must be provided.

3. Certificates issued by the following providers of career development and career services education will be accepted: NCDA select providers, ICF- or CCE-approved training providers, NACE, ATD, SHRM, OD Network, RWA, MBACSEA, Career Thought Leaders, Career Development Network, NAWDP, and accredited universities. Certificates should be uploaded in a single file.

CMCS commissioner will provide NCDA with list of approved providers from ICF/CCE plus NCDA select providers in 2021.

Fast Track Process (NCDA Headquarters & SMAPPLY)

1. Start CMCS application on SMAPPLY
2. Pay the CMCS application fee of $175
3. Click the prompt in SMAPPLY to accept the Fast Track application
4. Upload/complete all required information for education and relevant work experience
5. Upload a copy of your current coaching credential
6. Upload/complete the required information to document 60 CE contact hours in career development/services topics and activity as outlined previously (per NCDA CE Manual)

7. Upon review of your completed Fast Track Application (by Headquarters and/or approved CC Reviewers) the application will be approved, denied or placed in "pending' status while awaiting additional information from headquarters (for 2nd round review)

Proposed SMAPPLY Screen Sequence for CE Questions
Step 1: Have you completed FCD? If yes, skip to upload of certificate and end of application. If no, move to Step 2.

Step 2: Have you completed a 3-credit hour university career counseling or career development theory? If yes, ask how many courses (1 or 2)? If one, upload transcript and move to Step 3. If two, upload both transcript/s and move to end of application. If none, move to Step 3.

Step 3: Provide language from Item 3 under "Eligibilty" above with list of accepted providers. Applicant fills out CE form from CCC fast-track application and uploads certificate/s.

SECTION 2 – C

CREDENTIAL DEVELOPMENT: RETIRING A CREDENTIAL

In the event that a credential is not meeting the objectives of NCDA and/or the Credentialing Commission, the following process will be followed to retire a credential:
1. Commission will vote to retire the credential
2. Commission will present retirement recommendation to the NCDA Board for approval
3. NCDA Board will vote to retire the credential

In the event that the NCDA Board votes to retire a credential, the Director of Credentialing may notify those credential holders in writing that the credential they hold will be discontinued.
- This notification process will happen at least 60 days before the credential is officially discontinued.
- At that time, credential holders will be given alternative credentialing options, if applicable.
- The holders of the retired credential will be allowed to use the title and privileges associated with their credential in perpetuity or until the Credentialing Commission and NCDA Board decides otherwise.

Any amendment to this policy requires a majority vote (or quorum) of both the Credentialing Commission and NCDA Board of Directors.

SECTION 2 – D

CREDENTIAL EVALUATION PROCEDURES

Credentials will be evaluated every 3 years using a systematic method for collecting and analyzing the examination data.

Credential Evaluation should include two components:

1. Ascertaining ongoing need for and interest in existing credentials. This should include review to:
    a. note the number of credential holders at any given time,
    b. determine annual number of applications,
    c. ascertain general interest expressed in the credential, and
    d. establish employer and market demand for the credential (to the extent this can be determined).
2. Process evaluation may include reliability of competency testing, reviewer efficacy, and pass rate.

SECTION 2 – E

ALTERNATIVE PATHWAYS (AP) TO EXISTING CREDENTIALS POLICY

Policy Summary

The integrity and quality of NCDA credentials remains of utmost importance to the NCDA Credentialing Commission (CC). For that reason, pathways under consideration for becoming eligible to meet the criteria for an NCDA credential must meet the rigor, quality, and accountability standards set for any NCDA credential.

Definition of Alternative Pathway: Each NCDA credential has a clearly defined process in which to qualify to apply for and achieve the credential. **An alternative pathway (AP) is parallel process in which an individual can qualify to apply for and achieve an existing NCDA credential.**

As is the case with any new credential, the CC may consult with non-Commission stakeholders (e.g. appropriate Training and Education Council representation involvement, SMEs, compliance with NCCA accreditation standards) to be a part of the Advisory Taskforce. Although input is frequently sought from non-Commission entities, the vetting of any alternative pathway lies with the CC and is subject to Board approval.

For the full NCDA Alternative Pathways policy, reference the document titled *Alternative Pathways Policy Final 2019*.

SECTION 2 – F

PROCESS FOR ASSESSMENT TROUBLESHOOTING

Troubleshooting
1.   The rep should review the data by reviewers as to which case study is causing discrepancies in reviewer results and read the comments made by reviewers to understand their responses. Generally, discrepancies are caused by:
   a.   Lack of alignment between case study, the question phrasing or vagueness, and grading rubric specificity or vagueness.
   b.   Problem w/ reviewer interpretation or expectations

2.   We have found that frequent discrepancies exist among the reviewers the problem usually lies with 1.a.

3.   Resolving 1.a. Issues
   a. The rep should enlist Commission members to review the alignment between the 3 items in 1.a. It is helpful if one of the Commission members has a similar academic or experience background required by a credential applicant. The other Commissioner does not need the same background as that individual and should be reviewing for language clarity and alignment among the 3 parts of 1.a.

SECTION 2 – G

RECRUITMENT BLURB FOR ADVISORY TEAM

Dear

I come to you with a request and a volunteer opportunity. I am the Chair of the NCDA Credentialing Commission. We are beginning our process to create a new credential called the XXXX credential. This credential is in support of XXXX. A group has been working on this project for over a year. Sufficient progress has been made so it's time to develop the credential!

Here is my request. I am hoping you would be willing to lead the Commission's Advisory Team to develop this credential. Below are the team's tasks:

1.   Define the requirements for being able to apply for the credential
2.   Clearly identify the competencies required for the credential
3.   Develop a means to assess an applicant in relation to the competencies (most likely case studies)
4.   Recruit and train reviewers
5.   Oversee 1-3 pilots to test the assessments.

You are not in this journey alone. The NCDA Director of Credentialing and Special Projects, and I, Commission Chair, will assist you. We also have in mind another person or 2 to serve on the task force with you. We now have administrative staff at NCDA that can support us in this process as well.

We hope to begin this process soon.

Finally, how will you benefit from this volunteer opportunity? First, you will be having a major part in the creation of a new credential, which might provide you an opportunity to be a trainer of future individuals interested in the credential. If we seek a Commissioner to represent this credential, our task force members would be considered first. And, of course, here is a chance to give back to NCDA!

SECTION 2 – H

DISABILITY ACCOMMODATION POLICY

The NCDA Credentialing Commission complies with the ADA and offers reasonable examination accommodation(s) to individuals with disabilities.

Reasonable examination accommodation(s) under the ADA may be provided for candidates with visual, sensory or physical disabilities that would prevent them from taking the examination under standard conditions, including some diagnosed learning or mental health conditions so long as examinations can be completed with reasonable accommodations.

To qualify for a reasonable accommodation under the ADA, a qualified medical professional must provide a statement discussing the nature and extent of the applicant's disability and the resulting functional impairment that limits access to its examinations.

The following questionnaire must be submitted by any applicant seeking accommodation:

Test Accommodation Request Form

Complete this form only if you answered YES to the accommodation question on the main application. In addition to completing and signing this form, you must also submit documentation from a qualified professional verifying your functional impairment. This documentation must also include a diagnosis and the qualified professional's recommendation for accommodation.

Information regarding test accommodation decisions will not be released via telephone. All official communications regarding your request will be provided in writing.

NAME	First	Middle Initial	Last	Maiden Name (if applicable)
☐ Mr. ☐ Ms. ☐ Dr.				

NATURE OF DISABILITY		**Describe the functional limitation(s) that exist as a result of your disability for which test accommodations are necessary.**
☐	Cognitive (serious difficulty concentrating, remembering, or making decisions because of a physical, mental, or emotional condition)	
☐	Hearing (deaf or serious difficulty hearing)	
☐	Orthopedic or Physical (difficulty walking, ambulating, lifting, grasping, manipulating, or serious or extreme lack of range of motion in any joints)	
☐	Visual (blind or serious difficulty seeing)	
☐	Other (Please Specify)	

Indicate the accommodation(s) you are requesting. Note that accommodation(s) must be appropriate to the functional limitation(s) that exist as a result of the disability and must be supported by documentation from a qualified professional.	
☐	Scribe (An individual to operate mouse and/or keyboard for the applicant.)
☐	Reader (An individual to read information verbatim from screen for the applicant.)
☐	Time and a half
☐	Other – Describe below:

I hereby affirm that all the information provided above is complete, true, and correct. Further, I hereby consent to the release and disclosure, by the professional who has verified my disability and need for accommodation, of my Personal Health Information to the NCDA Credentialing Commission for the purpose of allowing NCDA to make a determination regarding my request for a testing accommodation. I understand that NCDA will employ reasonable commercial methods to help ensure that my Personal Health Information provided to NCDA is treated as confidential.

Signature of NCDA CC Applicant   Date (mm/dd/yyyy)

Documentation Submission Checklist

☐	Did you include documentation from a qualified professional that includes a diagnosis of a disability or disabilities?
☐	Did you include documentation from a qualified professional verifying your functional limitation(s)?
☐	Did you include documentation from a qualified professional that includes the professional's recommendation for accommodations?
☐	Did you complete, sign and date the form?

SECTION 2 – I

INTERNATIONAL APPLICATIONS PROCEDURES

The Credentialing Commission makes its credential assessment process available to all applicants globally. Assessments are offered in United States English only.

Individuals with degrees or coursework from post-secondary institutions that are not accredited by a US Regional or National Institutional Accrediting Agency as recognized by the US Department of Education, will need to complete a transcript evaluation for submission with credential application in addition to the degree or coursework transcript.

NCDA accepts transcription evaluation service from Josef Silny & Associates, Inc. International Education Consultants (http://www.jsilny.com)

SECTION 3 – A

NCDA CERTIFICATION APPEAL PROCEDURE

This Policy applies to individuals certified by the NCDA Credentialing Commission (certificants).

The following procedures will be used to review and resolve appeals and challenges related to certification requirements and eligibility standards. The Appeal Procedures serve as an informal process for the resolution of all complaints concerning Credentialing Commission determinations related to certification:

1. The Commission's interpretation of standards, including candidate eligibility determination, certificant renewal determination, and certification revocation determination,
2. Content of the exam and/or keyed responses to items,
3. Alleged inappropriate exam administration procedures, and/or
4. Alleged testing conditions severe enough to cause a major disruption of the examination process.

CERTIFICATION PROGRAM ACTIONS
Certificants and candidates may appeal the following adverse actions:

1. the candidate was found to be ineligible for certification due to a failure to satisfy one or more certification requirement(s), or was otherwise ineligible for certification,
2. the candidate failed a component of the assessment of competencies included failing one or more case study and retest or reference endorsement and/or verification of competencies, and/or
3. the certification is revoked due to a proven violation of the NCDA Code of Ethics, substantiated by evidence provided by any member of NCDA.

DEADLINE FOR APPEALS
Appeals must be received by the Chair of the NCDA Credentialing Commission within thirty (30) days of the date of an adverse action.

APPEALS PROCEDURES
The Appeal Procedures provide three (3) levels of review concerning the appeal of an adverse action:
1. an informal review and determination by the Director of the NCDA Credentialing Commission);
2. a formal appeal to the NCDA Credentialing Commission, to be received by the Chair and voted upon by the full Commission;
3. and, a limited right of appeal to the NCDA Board.

Detailed procedures are as follows.

1. **Informal Review by Director, Credentialing Commission**
   A certificant/candidate, who is the subject of an adverse Certification Program action, may appeal to the Director of the Credentialing Commission (Director of Credentialing) by submitting a written Request for Review. The Request for Review explains the reasons that the certificant/candidate believes the adverse action is incorrect and should be changed, and includes copies of all supporting documents. The NCDA Credentialing Commission Chairperson (Director) will conduct an informal review of the request, and will either uphold, modify, or take other appropriate action. The appeal may be referred for formal review to the NCDA Credentialing Commission for review and resolution.

2. **Appeals to the NCDA Credentialing Commission**
   Appeals of Director's determinations will be reviewed and resolved by the NCDA Credentialing Commission. An appeal to the Commission should explain the specific reason(s) that the initial decision is incorrect, and justification for why the initial decision should be reversed or modified.

3. **LIMITED FINAL APPEALS TO THE NCDA BOARD**
   Final appeals of NCDA Credentialing Commission may be reviewed and resolved by the NCDA Board in limited circumstances including:

   a. the candidate/certificant is able to demonstrate to the Credentialing Commission misapplied the relevant policies, which significantly affected the outcome of the decision;
   b. the candidate/certificant is able to demonstrate that the appeal request is based on a substantial and compelling reason, which clearly supports a modification or reversal of the Commission Decision; or,
   c. upon the request of the NCDA Credentialing Committee for a substantial reason, and with the consent of the candidate/certificant. All final NCDA Board appeal requests must be submitted to the Executive Director of NCDA.

   If the appeal is accepted by the NCDA Board, they will review the appeal record and issue a Final Decision. The certificant/candidate may be asked to appear before the NCDA Board at the certificant/applicant's expense.

FINALIZING AND CLOSING APPEALS
A Certification Appeal matter will be closed when:

1. the finalized appeal has been decided or resolved by the Director of the NCDA Credentialing Commission, the full NCDA Credentialing Commission, or the NCDA Board, and the time period to submit a further appeal has passed;
2. an appeal request to the NCDA Board has been denied; or,
3. the appeal has been withdrawn or terminated by the certificant/candidate.

The NCDA Board's appeals decisions are final.

SECTION 3 – B

REVOCATION POLICY

The certification can be revoked or a renewal of certificate can be denied for failure to satisfy one or more renewal requirement(s) including:

1. Failure to disclose or providing incomplete, false or misleading representations
2. Violating agreements related to the sharing of testing information as disclosed in the Attestation statement within the assessment
3. Using outside aid to complete assessments
4. Failure to cooperate in the investigation into ethical or policy violations

If a credential has been revoked, a former credential-holder is eligible to reapply, including completing the credential assessment process again, after a period of 2 years.

SECTION 4

ATTESTATIONS & SIGNATURES

¨ I understand that receipt of the CCSP credential depends upon my successful fulfillment of all required criteria in this application. I hereby indemnify and hold harmless NCDA, its agents, employees, directors, officers, advisors, counsel and affiliates SMApplyom against any and all claims, losses, actions, costs and expenses, including attorneys' fees, incurred by NCDA as a result of or arising out of any delay or rejection of my application, including the impact that the delay or rejection, for any reason, of a CCSP credential may have on my professional standing or employment status.

¨ If there is any dispute, controversy or claim arising out of or relating to this application and my use of the credential, I agree to attempt in good faith to resolve any such dispute by negotiation and consultation with NCDA. In the event that such dispute is not resolved on an informal basis within fifteen (15) days after written notice by me or NCDA, I agree to submit the dispute to be administered by the American Arbitration Association to be conducted in Tulsa County, Oklahoma in accordance with the Mediation Procedures of the American Arbitration Association as the exclusive method for dispute resolution. I agree to cooperate with NCDA and with the mediation service in scheduling and participating in the mediation proceedings. I agree that I will bear my own fees and expenses in connection with the mediation. I further agree that all offers, promises, conduct and statements, whether oral or written, made in the course of the mediation by NCDA, its agents, employees, experts and attorneys, and by the mediator and any employees of the mediation service, are confidential, privileged and inadmissible for any purpose, including impeachment, in any litigation, arbitration or other proceeding involving NCDA and me.

¨ I hereby indemnify and hold harmless NCDA, its agents, employees, directors, officers, advisors, counsel and affiliates SMApplyom against any and all claims, losses, actions, costs and expenses, including attorneys' fees, incurred by NCDA as a result of or arising out of: (i) my acts or omissions in my provision of services in connection with my CCSP credential; (ii) my failure to abide by the NCDA Code of Ethics and the provisions of this application; (iii) any falsification, including by omission or inclusion, of information on this application or any supporting documentation; (iv) my conduct or actions that are prejudicial to the purposes, interests, effectiveness, reputation or image of NCDA; (v) my failure to discontinue claiming the CCSP credential upon my failure to renew and/or pay the annual fee to maintain the CCSP credential; and (vi) any other action or omission relating to my CCSP credential.

¨ If I am granted CCSP credential and I fail to abide by the renewal requirements and/or fail to pay the annual fee to maintain the CCSP credential, I agree to immediately cease all use of and claim to the CCSP credential until I obtain further notice from NCDA that I am in good standing and approved for recertification.

¨ I have read, understand and hereby confirm that I will abide by the NCDA Code of Ethics. To protect the public and reduce legal liability to NCDA, I understand that the issuance of the CCSP credential is contingent upon my ongoing adherence to the NCDA Code of Ethics.

¨ The information, statements, and documents in this application are accurate and reflect my true experience, education, training, and expertise. Such information and statements are my sole responsibility and I agree to hold harmless and indemnify NCDA for any consequences resulting from any inaccurate or misleading information. I understand and agree that any misstatement or omission in the application may constitute grounds for withdrawal of the application for consideration, suspension of the application or a revocation of my CCSP credential. I will notify NCDA within ten (10) days if there are any changes to the information I have provided in my application.

¨ I agree that NCDA may contact any necessary third party in reviewing this application and I authorize the release of relevant information to verify the accuracy of the information I have herein provided.

¨ I understand that the biographical data provided in this application is considered public information and all data relating to this application and certification process as a whole may be used anonymously and in an unidentifiable manner for research and/or statistical purposes only.

¨ I agree that the questions and my answers provided to such questions in this application are confidential and I will not disclose such questions and/or my answers to any third party without the prior written consent of an authorized representative of NCDA.

¨ **I agree not to use any outside resources including such items, but not limited to, books, notes, journals, web resources, or other individuals (except for pre-arranged**

accommodations) in the completion of the assessment portion (case studies, scenarios) of the application.

Applicant's Signature: Date: