



Version Control

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1. Goal and general information

This document describes the detailed procedure for Registration of Training Providers and training materials.

Registration can be done by intacs™ or (based on same criteria) by registered registration organizations or Certification Bodies.

Registration is possible for each level / type of training.

At least one training (course) has to be submitted by the provider to start any registration process.

Registration as Training Provider (which implies commitment to follow the rules) is necessary for course registration.

For each course registration is granted separately (in addition to general registration of the Training Provider).

In order to support an objective, consistent and efficient registration process intacs™ have issued the following procedures.

2. Registration of Training Providers

The procedures for registration and re-registration and the content requirements (e.g. course syllabus) will be changed by intacs™ only once a year.

The English version of procedures and requirements for the following calendar year will be provided to the Certification Bodies and all registered Training Providers until the 30th September (date of sending) of each year.

The national language versions (if applicable) will be provided until the 30th October (date of sending) of each year.

The information will be sent out to the communicated business contact by mail and in written form.

The information includes:

- prices for intacs™ services, e.g. registration fees
- procedures & requirements for registration and re-registration
- syllabus for courses that can be registered

Cost for registration and certificate are defined (yearly) by intacs™ (defines process for all registration organizations)

Registration is granted for one calendar year.

For the Verification and Validation procedure intacs™ defines a standard approval checklist with all relevant aspects / checkpoints that will be relevant for the procedure.

The standard procedure is designed for registration of a provider and a course at the same time.

The decision will be made on the percentage of checkpoints fulfilled by the applicant (based on the valid approval checklist which is defined for each type of course). The valid approval checklist is provided by intacs™ or Certification Body on request.

Cost for registration and certificate are defined (yearly) by intacs™ (defines process for all registration organizations)

Registration is granted for one calendar year.

intacs™ will provide a list of registered Certification Bodies upon request. The list of registered Certification and forms for registration are available on the intacs™ website.

2.1. Registration procedure

2.1.1. Required input information

Applicant has to provide to the responsible Certification Body (see intacs™ website) the following:

- filled application form. The template provided on the intacs™ website shall be used.
- named point of contact at the applicant's regarding the application process
- course materials:
 - ☐ complete set of training materials
 - ☐ references between training material elements and training syllabus
 - ☐ list of trainers:
 - at least two registered intacs™ Instructors (registration and renewal requirements see Procedure Assessor Certification).

At least one of the trainers must have a valid contract of employment with the Training Provider. The other trainers must prove to have a contractual relationship with the Training Provider of at least on year.

- the proof of qualified trainers can be substituted by having at least two instructor candidates with evidence that the requirements for the corresponding training level as given in procedure Assessor Certification are met. Section 2.4 in this document applies. The trainers should be qualified and only the observation may be outstanding (missing).

At least one of the trainer candidates must have a valid contract of employment with the Training Provider. All other trainers must prove to have a contractual relationship with the Training Provider of at least on year.

- ☐ quality assurance procedures & records for materials
- ☐ materials have to be sent in electronic format, i.e. by e-mail or on CD, DVD in PDF or other agreed format.

2.1.2. Verification and Validation of application

The verification and validation is performed based on the valid approval checklist for the specific course type, e.g. Provisional ISO/IEC 15504 Assessor.

1st step (formal acceptance check):

- Formal review of completeness of provided information as defined in Section 2.1.1
 - ☐ completeness of material (as defined in formal approval part of the checklist):
 - ☐ formal quality (spelling, etc.)
- If the formal quality is not satisfactory the applicant is informed by email.
- The applicant has to provide an improved version at latest 4 weeks after notification. Otherwise the applicant has to provide a new application.

The formal check for completeness has to be done in less than 5 working days.

2nd step (content acceptance check):

Prerequisite: Formal acceptance check passed

- Validation of course material against the content checklist defined and provided by intacs™, which includes inter alias:
 - ☐ coverage of syllabus
 - ☐ description of learning goals per module
 - ☐ trainer guidelines
- The validation can be done by third party on behalf of the Certification Body or intacs™.
- The validation has to be performed by at least two intacs™ ISO/IEC 15504 Instructors appointed by the intacs™ Advisory Board. These reviewers' assessors have to sign a NDA before receiving the material.
- There are two alternatives for performing a validation:
 - a) The validation is performed individually and the two reviewers document their individual findings and recommendations independently. After completion they arrange an exchange of information and finalize an agreed and consensual recommendation.
 - b) The validation is performed in a sequence. First reviewer is documenting the findings and passes the results and observations to the second reviewer. The second one is in charge to clarify all open issues by contacting the first reviewer. The agreement on the result has to send out by the second reviewer after written agreement by the first reviewer to the final judgment.

All checks are performed using course specific checklists defined by intacs™.

The entire application procedure will be completed done in 6 weeks after the Certification Body has confirmed completeness of the required input information.

2.1.3. Granting Registration

There are the following three types of registrations with additional restraints depending on whether instructor observation is needed:

	“Full Registration”	“Registration with minor deficiencies”	“Registration with major deficiencies”
Trainers are registered instructors	<p>Formal content check passed.</p> <p>Content acceptance check passed 100%.</p> <p>Contract signed by applicant and Certification Body.</p> <p>Payment of registration fee.</p> <p>Full registration granted for 1 year.</p>	<p>Formal content check passed.</p> <p>Content acceptance check resulted in a value between margin and 100%.</p> <p>Contract signed by applicant and Certification Body.</p> <p>Payment of registration fee.</p> <p>Temporary TP registration granted:</p> <ul style="list-style-type: none"> • The applicant is allowed to officially perform trainings using the course materials under verification and validation. • The applicant has to fix the deficiencies within in 8 weeks after the notification advance to “Full Registration”. Otherwise, the temporary registration is withdrawn. 	<p>Formal content check passed.</p> <p>Content acceptance check resulted in a value below margin.</p> <p>Contract signed by applicant and Certification Body.</p> <p>Payment of registration fee.</p> <p>Temporary TP registration granted.</p> <ul style="list-style-type: none"> • The applicant is <i>not</i> allowed to officially perform trainings. • The applicant has to fix the deficiencies within in 8 weeks after the notification in order to advance to “Full Registration”. Otherwise, the temporary registration is withdrawn.
At least one trainer needs observation (Section 2.4 applies)	<p>dto.</p> <p>Temporary registration granted is further subject to Section 2.4.4</p>	<p>dto.</p> <p>Temporary registration granted is further subject to Section 2.4.4.</p>	<p>dto.</p> <p>Temporary registration granted is further subject to Section 2.4.4.</p>

2.2. Re-Registration (with Course Changes)

2.2.1. Required Input Information

All requirements as defined in Section 2.1.1 applies. In addition the required input information must contain a documented list of commented changes and modifications.

2.2.2. Verification and Validation

See Section 2.1.2 with the following exception: in the 2nd step (content acceptance check) for the unchanged parts of the materials the content and quality is only checked by a random sample of the material.

2.2.3. Granting Registration

See Section 2.1.3

2.3. Re-Registration (without Course Changes)

Changes in order to improve the training material are allowed. The training provider has to assure that changes to training courses are conformant to the syllabus.

The Advisory Board makes the final decision about the request for re-registration.

This part describes the standard procedure for the re-registration based on an unchanged course. The criteria for what is defined as unchanged are defined in chapter 4 of this procedure.

For the Verification and Validation procedure intacs™ defines a standard approval checklist with all relevant aspects / checkpoints that will be relevant for the procedure.

The decision will be made on the percentage of checkpoints fulfilled by the applicant (based on the valid approval checklist which is defined for each type of course). The valid approval checklist is provided by intacs™ or Certification Body on request.

2.3.1. Required Input Information

Section 2.1.1 applies.

2.3.2. Verification and Validation

The changed course material elements undergo a full formal and content check as defined in Section 2.1.2. As for the unchanged course materials content and quality checks are performed as spot checks.

2.3.3. Granting Registration

See Section 2.1.3.

2.4. Observation of Instructor Candidates

2.4.1. Appointing observers

The intacs™ Advisory Board suggests an observer. The Training Provider can disapprove of this suggestion once. In such a case the Advisory Board appoints a second but final observer.

An observer must be an registered trainer at the level of observation.

2.4.2. Observation planning

The observation is planned together by the applicant and the observer appointed in a timely and logistic manner. Technical decisions, e.g. what course module to be trained by which instructor candidate, are upon the observer.

2.4.3. Observation execution

At most two instructor candidates can be observed by an observer.

- Observation of a single instructor candidate
 - ☐ The observation duration must be at least 3 days.
 - ☐ The observation must include all didactical course elements according to syllabus, e.g. instructor presentations, supervision of student presentations, case studies, role plays, written exercises, public discussions etc.
- Observation of two instructor candidates
 - ☐ The observation duration is the full duration according to the syllabus
 - ☐ At most two instructor candidates can be observed in a single course delivery. The observation of each candidate must include all didactical course elements according to syllabus, e.g. instructor presentations, supervision of student presentations, case studies, role plays, written exercises, public discussions etc.

The observer remains passive at all times. At the end of each course day a feedback session between observer and instructor candidates shall take place.

Assurance of training delivery under observation:

The organization which has requested the observation shall provide a training responsible who in case of severe deficiencies will take the role as trainer. This responsible can be an registered instructor internal or external to the organization or the observer.

If the observation shows severe deficiencies in training delivery so that the course objectives will not be met the observer has the right to stop the training delivery by the observed candidate. The course then has to be delivered by the predefined training responsible.

2.4.4. Observation validation

The observer documents his evaluation in a report by the use of the "Instructor Candidate Observation Sheet" template that contains the pass criteria. The report is to be submitted by the observer to the intacs™ Advisory Board within one week after the last course day.

After taking the exam the Certification Body collects the feedback reports filled by the participants and delivers these to the Advisory Board within one week after the last course day.

The Advisory Board then validates the observation based on the observer's observation report and the participants' feedback reports. The Advisory Board informs the Certification Body about the validation outcome within two weeks after having received all required inputs.

If only one of the criteria in the observation report is not met a follow-up observation of one day with respect to the corresponding criterion can be performed. If this criterion is again not met the observation has failed.

If more than one of the criteria in the observation report is not met then the observation has failed. A follow-up observation is not possible here.

In the case that the evaluations in the observation report and the participants' feedback reports should differ significantly the Advisory Board can require a new or a follow-up observation to be performed.

In the event of final observation failure the Certification Body will withdraw the temporary training provider registration.

2.4.5. Costs

The applicant has to pay

- an observation fee per observation day excluding expenses. Please refer to the intacs website for details.
- travel expenses based on receipts to be submitted by the observer to the training provider candidate.
- a lump sum for self-catering; the tax regulations and of the country of the observer's residence apply.

Payment is due 4 weeks after the last observation day. The applicant pays the observer or his employer directly.

2.4.6. Instructor registration

An registration of the instructor candidate by the Certification Body requires the following criteria to be met:

- positive observation validation by the intacs™ Advisory Board (see Section 2.4.4).
- confirmation of the observer or his employer that payment of all costs (see Section 2.4.5) by the applicant has been completed within 4 weeks after the last observation day

In the case that the criteria are not fully met the candidate can re-apply for instructorship after 1 year.

If the criteria are fully met the instructor candidate receives an registration by his name being listed on the intacs™ website. An instructor does not receive a certification. For details, including validity rules of instructor registrations, please refer to the Procedure Assessor Certification.

3. Duties of the Advisory Board

The Advisory Board assures objective and independent verification and validation with the authority to finalize decisions. The board will also verify revocation of registrations upon request.

If not stated otherwise the Advisory Board finalizes decisions within 6 weeks after having received a request.

4. Revocation of an registration

The registration can be revoked if any of the legal obligations of the Training Provider is missed.

The revocation is Valid after

- ☐ the registered organization has formally accepted the revocation
- ☐ 3 weeks without request of verification by the registered organization
- ☐ after decision by the Advisory Board (see 3)

For a new registration a new application has to be done.