

IC Assessment Platform - User Guide

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About the User Guide

This guide is intended as an aid for using the IC Assessment Platform, which can be accessed here: <https://icvcm.enkrateia.io/>

If you have any issues or questions, please contact applications@icvcm.org.

Features Coming Soon

There are several features currently under development that will improve the functionality and ease of use of the IC Assessment Platform.

The following features are currently in development, with placeholders shown on the platform:

1. Document uploads
2. Export of responses in PDF format

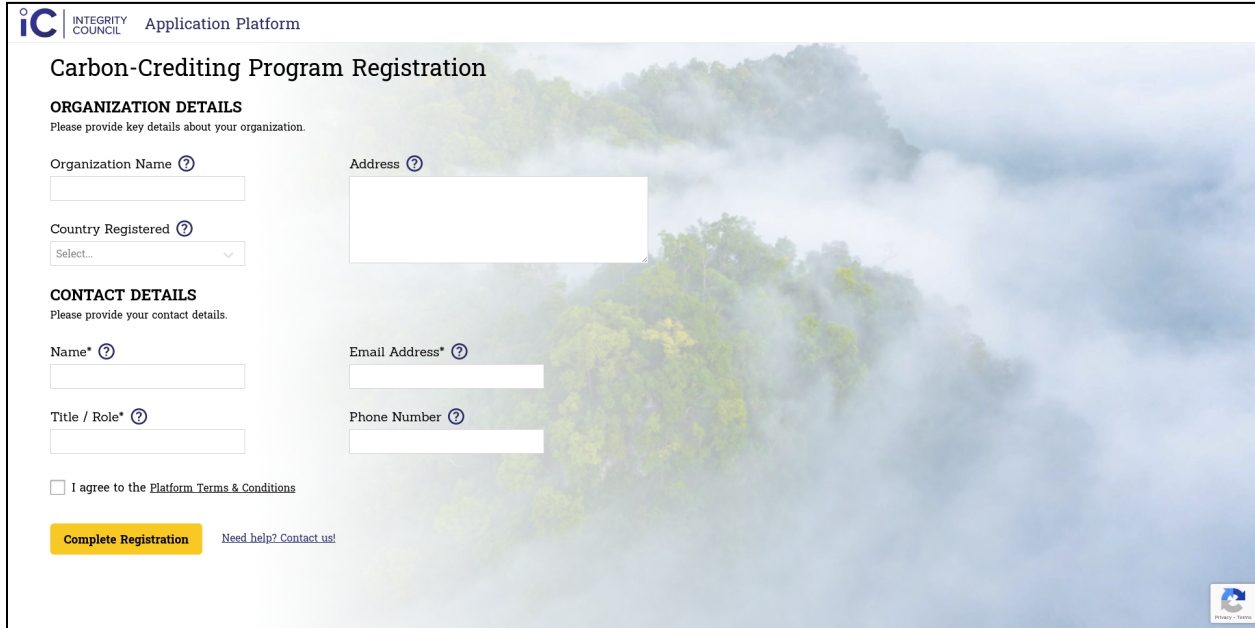
This guide will be updated as new features are made available.

1. Summary / Quick Start Guide

1. Use the [registration page](#) to submit a registration request. Once your registration has been approved, login details will be sent via email.
2. Proceed to the [login page](#), and after logging in to the IC Assessment Platform, click '+ Program-Level Assessment' to start a new Program-Level Assessment.
3. Once it has been created, click on the new Assessment entry to see the Assessment Overview.
4. Click into each of the sections and criteria.
5. Under each criterion, you will find a 'Background' and 'Questions' tab. Review the 'Background' tab, and proceed to the 'Questions' tab.
6. Review and update each question within each of the criteria. Click 'Mark as Complete' once all questions within the criterion have been filled out.
7. Create tickets as needed for any questions or issues.
 - a. The 'Create Ticket' button can be found on most screens of the platform.
 - b. By default, these tickets will be assigned to the IC Support Team. If the ticket relates to a specific criterion, please be sure to select the criterion from the 'Linked Criterion' drop-down menu in the 'Create Ticket' dialog box.
8. Once all sections have been completed, the application can be submitted by clicking 'Start Submission Process'.

- a. NOTE: This functionality is currently disabled pending updates related to Release 2 of the Assessment Framework.

2. Registration Page



IC | INTEGRITY COUNCIL | Application Platform

Carbon-Crediting Program Registration

ORGANIZATION DETAILS
Please provide key details about your organization.

Organization Name [?]

Address [?]

Country Registered [?]
Select...

CONTACT DETAILS
Please provide your contact details.

Name* [?]

Email Address* [?]

Title / Role* [?]

Phone Number [?]

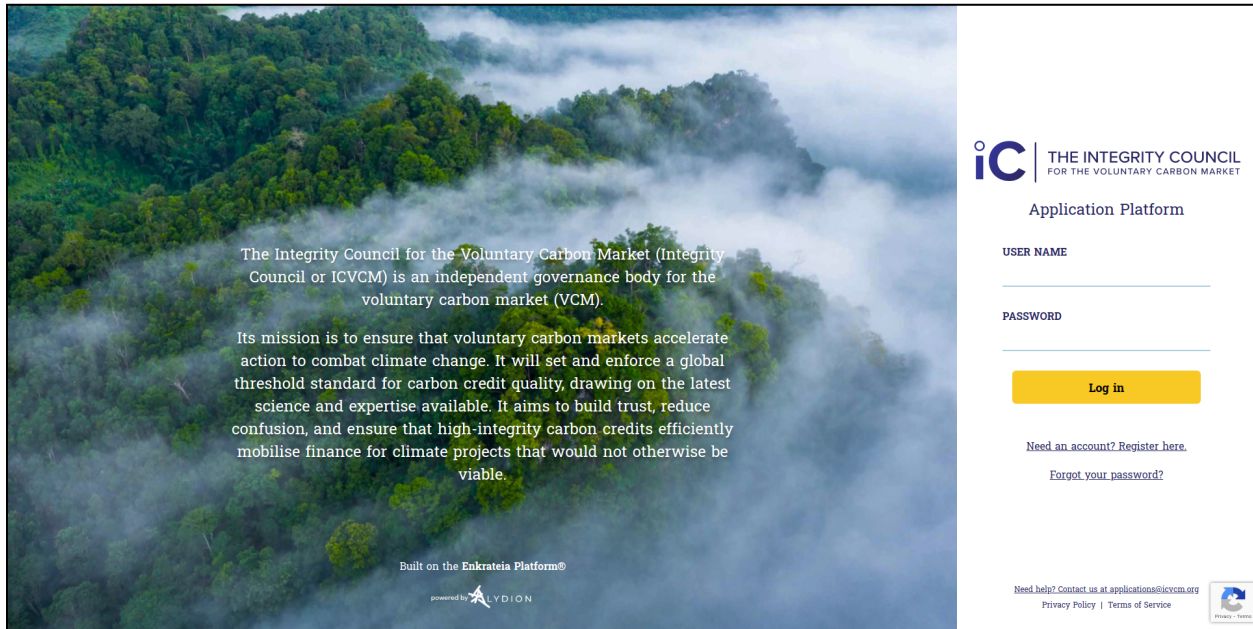
☐ I agree to the [Platform Terms & Conditions](#)

[Complete Registration](#) [Need help? Contact us!](#)

Privacy Policy


1. The registration page can be accessed [here](#) or by clicking the 'Need an account? Register here'. link on the login page.
2. After entering all required details, click the 'Complete Registration' button to generate a registration approval request.
3. Once the request has been approved, login information will be shared with the organization contact person.
 - a. This account activation email also contains instructions for setting a password.
 - b. If additional members of your organization needed to be added as users, please send a request to applications@icvcm.org.

3. Login Screen



The Integrity Council for the Voluntary Carbon Market (Integrity Council or ICVCM) is an independent governance body for the voluntary carbon market (VCM).

Its mission is to ensure that voluntary carbon markets accelerate action to combat climate change. It will set and enforce a global threshold standard for carbon credit quality, drawing on the latest science and expertise available. It aims to build trust, reduce confusion, and ensure that high-integrity carbon credits efficiently mobilise finance for climate projects that would not otherwise be viable.

Built on the Enkrateia Platform®
powered by 

iC | THE INTEGRITY COUNCIL
FOR THE VOLUNTARY CARBON MARKET

Application Platform

USER NAME


PASSWORD

Log in

[Need an account? Register here.](#)

[Forgot your password?](#)

[Need help? Contact us at \[applications@icvcm.org\]\(mailto:applications@icvcm.org\)](#)
[Privacy Policy](#) | [Terms of Service](#)



1. You can access the login screen [here](#).
2. Your user name is your email address, unless a distinct ID has been provided to you.
3. Enter the password set via the account activation email prompts.
4. Click the 'Log in' button.
5. The first time you log in (or log in from a new browser), you will be presented with Terms of Service that must be acknowledged.

4. Program Dashboard / Home Screen

Program-Level Assessments

PROGRAM NAME	OPEN TICKETS	% COMPLETE	STATUS
Validation test - Non-CORSIA	0	0%	● Open >
Validation Test - CORSIA	1	7%	● Open >

Recent Tickets [All Tickets](#) [Create Ticket](#)

TICKET NO	DESCRIPTION	STATUS	ASSIGNED TO	DUE DATE
000001	Ticket test for validation	Open	Sirtaj Brar	7/20/2023

Upon logging in, you will be presented with the 'Home' or 'Dashboard' screen. Each section of this screen is detailed below.

4.1 Top Nav

The following links are available in the navigation bar across the top of the screen and are persistent across all screens.

1. Home - links to this screen
2. Tickets Overview - links to the Tickets Overview screen
3. Document Upload (currently inactive) - This will be enabled later.
4. User Guide - a link to this guide
5. Bell / notification icon (inactive) - In-app notification will be enabled soon.
6. User Icon - used to log out

4.2 Main Screen

1. Top level buttons
 - a. + Program-Level Assessment - Click this button to begin a new Program-Level Assessment. See additional details [here](#).

- b. Organization Profile- Click this button to view an organization's profile. See additional details [here](#).
 - c. My Profile - Click this button to view a user's profile. See additional details [here](#).
 2. Program-Level Assessments section
 - a. Shows all Program-Level Assessments that have been started by users within your organization.
 - b. Information in this section can be sorted by clicking on the column headings.
 - c. **Clicking on one of the Program-Level Assessment entries in the section takes you to the [Assessment Overview](#) screen.**
 3. Recent Tickets
 - a. Shows a list of recent tickets.
 - b. Clicking one of the entries takes you to the Ticket Detail for that ticket.
 - c. Clicking the 'Create Ticket' button shows the Create Ticket dialog screen. This button is available in many places to easily facilitate the creation of tickets. See more in the [Tickets section](#).

4.3 New Program-Level Assessment

Clicking + Program-Level Assessment' allows you to start a new Program-Level Assessment.

You will be asked to first select an Assessment Type. Two options are available:

- CORSIA Approved - Program Level Assessment
- Non-CORSIA Program Level Assessment

Please also enter a name for your Program Assessment.

The image shows two screenshots of the 'New Assessment' dialog box, separated by a right-pointing arrow. The left screenshot shows the initial state: 'Organization*' is set to 'Proponent 1 Org', 'Assessment Type*' is set to 'Select...', and 'Program title*' is empty. The right screenshot shows the state after selection: 'Assessment Type*' is set to 'Program Level Assessment (CORSIA ...)' and 'Program title*' is set to 'My First Program Assessment'. Both screenshots include a 'Submit' button and a footer with a disclaimer and a 'Contact Us' link.

Upon clicking 'Submit', you will be presented with an Assessment Disclaimer. Please review and click 'OK'.

Once completed, your new Program-Level Assessment will be visible in the Program-Level Assessments section. Clicking on it will take you to the [Assessment Overview](#).

4.4 Organization and User Profile

The screenshot displays the 'Application Platform' interface for the Integrity Council. The top navigation bar includes the 'iC' logo, 'INTEGRITY COUNCIL', and 'Application Platform' text. On the right, there are links for 'Home', 'Tickets Overview', a notification bell, and a user profile icon.

Organization Profile

Organization Name: Proponent 2 Org
Country Registered: United Kingdom
Address: 456 Main St
London SW1F 6RC

? Need updates or additional users? Please contact us at applications@icvcm.org.

User Details

NAME	TITLE	EMAIL	SYSTEM ROLE	PHONE NUMBER
Proponent 2B		proponent2B@lydion.com	Standard User	555-555-1238
Proponent 2A		proponent2A@lydion.com	Standard User	555-555-1237

At the bottom, there are links for 'Privacy Policy', 'Terms of Service', and 'Contact Us'. A small 'Privacy - Terms' icon is also visible in the bottom right corner.

The Organization and User profiles are currently combined into one screen for easy reference.

This screen shows the key details registered for your organization, as well as each of the users that have been set up within your organization.

If updates are needed, or you would like to request the addition of more users, please contact applications@icvcm.org.

5. Assessment Overview Screen

The screenshot displays the 'Assessment Overview' screen. The left sidebar contains the following information:

- Company/Organization: Proponent 1 Org
- Program name: My CORSIA Assessment
- Assessment Status: Open » In Review » Final
- Assessment Response Completion: 0%
- Open Tickets: 1
- Last updated: 13-Jun-2023
- IC Relationship Manager: IC Support Team
- Export Responses button

The main content area shows the 'Program Level Assessment (CORSIA Eligible)' with a list of links:

- ICVCM.org
- Assessment Framework
- Assessment Procedure
- Application Platform Background and Orientation - link to be updated

A 'Create Ticket' button and a 'Start Submission Process' button are also visible.

The 'Sections' table is as follows:

SECTION / CRITERION	REVIEW RATING	OPEN TICKETS	RESPONSE STATUS
» Background	●	0	Not Started
» A – Governance	●	1	Not Started
» B – Emissions Impact	●	0	Not Started
» C – Sustainable Development	●	0	Not Started

The Assessment Overview presents all details of the selected Program-Level Assessment and can be used to review and enter details related to different criteria.

5.1 Overview Screen - Left Side Pane

1. The Program Name entered previously is directly editable here. Click the pencil icon next to it or click in the field itself.
2. Other key details of the Program-Level Assessment are visible here, including the current status, the percent completed, and the number of open tickets.
 - a. Assessment Status - All new Assessments start in the 'Open' status and can be fully edited. Once an Assessment has been submitted for review, it will become locked as the IC team completes their review. After all open items have been addressed, it changes to 'Final' status.
 - b. Assessment Response Completion is a representation of the number of criteria marked as complete. See more details in the [Criteria and Questions section](#).
 - c. IC Relationship Manager - This states the direct contact person that will be supporting your Assessment.
3. 'Export Responses' is currently inactive, but once enabled will generate a PDF with all criteria and responses entered.
4. The panel itself can be collapsed by clicking the chevron/arrows in the top right corner.

5.2 List of Sections and Criteria

1. The top of this section has information and links about the Program-Level Assessment.
 - a. Once all responses are in 'Complete' status, the proponent will be able to click the 'Start Submission Process' button.
 - b. NOTE - The 'Start Submission Process' button is currently disabled, pending updates related to Release 2 of the Assessment Framework.
2. Each section can be expanded by clicking the arrows to the left of the section name.
3. Once expanded, all the criteria within that section will be displayed along with the status for each:

Application Platform			
SECTION / CRITERION	REVIEW RATING	OPEN TICKETS	RESPONSE STATUS
Background		0	In Progress
Category Level (Must Read)		0	
Methodologies for Exclusion		0	
A – Governance		1	In Progress
1.1 Effective Governance		0	
1.2 Public Engagement, Consultation, And Grievances		1	
2.1 Effective Registries (Retirement And Addressing Erroneous Issuance)		0	
3.1 Information		0	
4.1 Robust Independent Third-Party Validation And Verification		0	
B – Emissions Impact		0	Not Started
C – Sustainable Development		0	Not Started

- a. Additional details about the Criterion Review Rating and Response Status can be seen by clicking the help icons next to each.
 - b. 'Open Tickets' is the count of open tickets associated with that criterion. Where the icon appears next to a section name rather than an individual criterion, it indicates the sum of all open tickets for the criteria in that section.
4. Clicking on one of the criteria will take you to the 'Background' screen for that criterion.

6. Criteria and Questions

The screenshot displays the Integrity Council Assessment Platform interface. The top navigation bar includes the IC logo, 'Assessment Platform', and links for Home, Tickets Overview, Document Upload, and a user profile. The left sidebar contains a navigation menu with 'Section A – Governance' and 'Criterion 2.1 (a) Effective Registries (Retirement and Addressing Erroneous Issuance)'. The main content area shows the 'Background' tab selected, with a 'Create Ticket' button. The background text explains that a registry is an information technology system used by a carbon-crediting program to identify mitigation activities and track each carbon credit from its issuance through subsequent transactions to its retirement or cancellation. It further states that registries play a critical role in ensuring high integrity by providing a transparent and secure platform to track and verify carbon credits. A callout box specifies that the carbon-crediting program's registry should identify by whom and on whose behalf a carbon credit was retired, identify the purpose of retirement, have procedures in place to address erroneous issuance of carbon credits as well as procedures and requirements to ensure no more than one carbon credit is issued per tonne of CO2 equivalent. A 'Continue >' button is located at the bottom right of the main content area. The sidebar also shows 'Response Status: Not Started', 'Last Update: 28-Feb-2023', 'IC Review: Not Reviewed', 'Open Tickets: 0', and 'IC Relationship Manager: IC Support Team'. At the bottom of the sidebar, it mentions 'Built on the Enkrateia Platform®' and 'powered by LYDION'.

On this screen, background and context for each criterion is provided, along with the specific questions that must be answered. Additionally, there is also a list of tickets related to the criterion.

Clicking the 'Create Ticket' button opens the Create Ticket dialog screen. This button appears in many screens within the platform to facilitate the easy creation of tickets. See more in the [Tickets section](#).

6.1 Left Side Pane

(Shown in image above)

1. The section lists key details such as:
 - a. The specific criterion you are viewing
 - b. The current status of your response. See details [here](#).
 - c. The IC Review status of the criterion

2. It is possible to directly navigate to the previous or next criterion by clicking the arrows next to the section and criterion names.
3. This section can be collapsed by clicking the chevron/arrows in the top right corner.

6.2 Background

(Shown in image above)

The Background presents important context about the criterion to which you are responding.

Click 'Continue' to go to the Questions tab, or click directly on 'Questions' at the top.

6.3 Questions

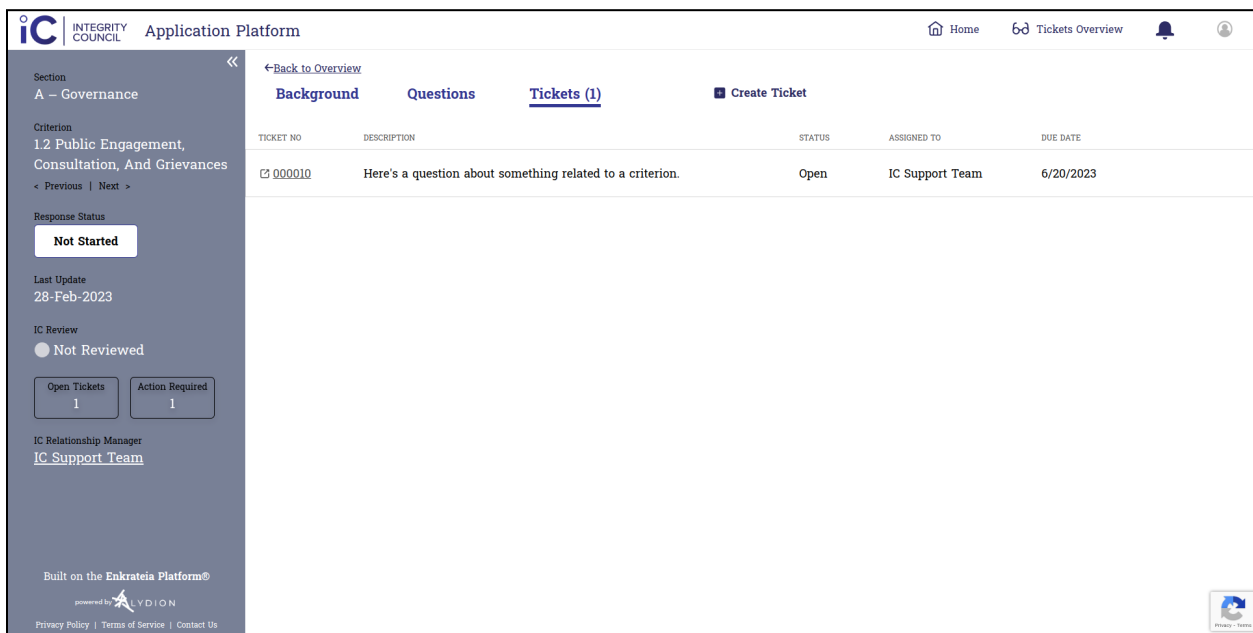
The screenshot shows the 'Integrity Council Application Platform' interface. The top navigation bar includes 'Home', 'Tickets Overview', and a user profile icon. The left sidebar contains a 'Section' dropdown set to 'Background', a 'Criterion' dropdown set to 'Category Level (Must Read)', and a 'Response Status' dropdown set to 'In Progress'. Below these are 'Last Update' (28-Feb-2023), 'IC Review' (Not Reviewed), and buttons for 'Open Tickets' (0) and 'Action Required' (0). The main content area has tabs for 'Background', 'Questions' (selected), and 'Tickets (0)'. A 'Create Ticket' button is in the top right. The 'Questions' tab displays a message: 'Please acknowledge that you have reviewed the details provided in the Context section. Please create a ticket for any questions.' Below this is a 'We have reviewed the assessment framework background materials.' section with a 'Yes' dropdown and a 'Mark as Complete' button. The bottom of the sidebar shows 'Built on the Enkratea Platform®' and 'powered by LYDION'.

The Questions tab details each of the specific questions that require a response as part of the criterion.

1. Saving updates and criterion status updates:
 - a. Updating an entry will result in it being auto-saved, with the status automatically updating as well if appropriate (from 'Not Started' to 'In Progress', for example).
 - b. Clicking 'Mark as Complete' will update the response status to 'Complete'. You will not be able to edit your response after it is marked as 'Complete'.
 - c. However, if the status is set to 'Complete', the button at the bottom will change to 'Revert to In Progress'. Clicking the button will change the status back to 'In Progress' and allow you to once again make updates.

- d. The 'Response Completion' percentage shown on the [Assessment Overview](#) is based on the number of criteria that are in 'Complete' status.
2. A response is required for each question on this page. If required, some questions may be responded to with 'N/A' or similar..
 - a. It will not be possible to click 'Mark as Complete' if there are unanswered questions.
 - b. Upon clicking 'Mark as Complete', any errors (whether related to missing responses or other issues) will be shown next to each question.

6.4 Tickets (on Criterion screen)



The screenshot shows the 'Integrity Council Application Platform' interface. On the left sidebar, the 'Section' is 'A – Governance' and the 'Criterion' is '1.2 Public Engagement, Consultation, And Grievances'. The 'Response Status' is 'Not Started'. The 'Last Update' is '28-Feb-2023'. The 'IC Review' status is 'Not Reviewed'. There are '1' Open Ticket and '1' Action Required. The 'IC Relationship Manager' is 'IC Support Team'. The main content area shows a table of tickets:

TICKET NO	DESCRIPTION	STATUS	ASSIGNED TO	DUE DATE
000010	Here's a question about something related to a criterion.	Open	IC Support Team	6/20/2023

At the bottom of the sidebar, it says 'Built on the Enkrateia Platform®' and 'powered by LYDION'. There are links for 'Privacy Policy', 'Terms of Service', and 'Contact Us'.

This screen lists any tickets that are associated with this specific criterion. Clicking one of the entries will take you to the [Ticket Detail](#) for that ticket.

6.5 Response Status

Each criterion has the following possible status values:

1. **Not Started** - No updates have been made to the criterion or section.
2. **In Progress** - Updates to the criterion are in progress, but it has not been marked as 'Complete'.
3. **Complete** -
 - a. Clicking 'Mark as Complete' for a criterion updates it to this status, indicating that updates are finished.

- b. Each of the question responses will be 'grayed out', and you will not be allowed to make edits if the status is 'Complete'.
 - c. It is possible to later click 'Revert to In Progress' to return the criterion to that status and make updates.
- 4. **In Review** - This indicates that review is in progress for the criterion and it cannot be updated.
- 5. **Review Complete** - This indicates that review has been completed, with all open items resolved.
- 6. **Update Required** - This status will be manually set by the reviewer instead of the 'Review Complete' status to indicate that an update is required to proceed.
- 7. **Not Required** - This status can be manually set by the reviewer if an entire criterion is not required.

7. Tickets

Tickets should be used for raising issues or asking questions. They can easily be tracked in the system, as both updates and history are available.

Tickets will also be used by reviewers to raise any concerns or issues with responses to the different criteria. Tickets are expected to be created for everything ranging from general questions to specific items that need to be remediated.

7.1 Create Ticket

Create ticket

Organization: Proponent 1 Org

Linked Criterion: None

Ticket Description*

Assigned to: IC Support Team

Due date ? 6/20/2023

REVIEW RATING SUBMIT CANCEL RESPONSE STATUS ?

Clicking the 'Create Ticket' button on any screen will display the above dialog screen.

- 'Organization' will default to your organization
- 'Linked Criterion' will default to the criterion you are currently reviewing (if any). Otherwise, it will default to 'None'.
- Please enter a detailed ticket description.
- Tickets are assigned to the IC Support Team by default but can be assigned to any users within your organization for internal review or updates.
- The requested due date/response date is set to seven (7) days from today by default.

Submitting a ticket causes a notification to be sent to the person or team the ticket has been assigned to.

7.2 Tickets Overview

Application Platform

Home Tickets Overview

8 Open Tickets 4 Assigned to Me 5 Past Due 1 Closed

Tickets Overview Create Ticket

TICKET NO	DESCRIPTION	STATUS	ASSIGNED TO	DUE DATE	LINKED CRITERION
000002	This is a general question that is...	Open	Reviewer 1A	5/4/2023	-
000001	Test ticket that is tied to an RFP...	Closed	Reviewer 1A	4/29/2023	-
000003	Here is another question. This o...	Open	Proponent 1A	5/4/2023	-
000005	This is just another ticket for tes...	Open	Proponent 1A	6/4/2023	-
000006	test	Open	Proponent 1A	6/1/2023	-
000007	Trying out one more ticket.	Open	Reviewer 1A	6/4/2023	-
000008	Testing tickets, testing tickets, 1, ...	Open	Reviewer 1A	6/14/2023	-
000009	Still testing more tickets....	Open	Proponent 1A	6/14/2023	-

The Tickets Overview lists all tickets within the user's organization. They can be sorted by clicking on any column heading and filtered by typing or selecting a value in the 'Search...' box.

The following key metrics are shown in boxes across the top of the screen. Clicking on each brings up a 'filter view' with preselected filter criteria to show the tickets based on the metric that was clicked:

- Open Tickets - the number of tickets with 'Open' status
- Assigned to Me - the number of tickets marked 'Open' and assigned to you
- Past Due - the number of tickets past the requested due date
- Closed - the number of tickets that have been closed

Note that for the 'Due Date' drop-down menu, a calendar is shown with 'From' and 'To'.

- Selecting only a date in the 'From' calendar will show all tickets created on or after that date (inclusive of the date).
- Selecting only a date in the 'To' calendar will show only tickets created before that date(exclusive of the date).

Clicking on a ticket number will take you to the relevant Ticket Detail screen.

7.3 Ticket Detail

The screenshot shows the 'Ticket No. 5' detail page. At the top, there's a header with the Integrity Council logo and 'Application Platform'. Navigation links for 'Home' and 'Tickets Overview' are visible. A 'Mark as closed' button is present. The ticket status is 'Open'. It is assigned to 'Proponent 1A' with a dropdown arrow. The due date is '6/4/2023'. The ticket description is 'This is just another ticket for testing.' Below this is a 'Comments' section with a text input field and an 'Enter comment' button. At the bottom, there are links for 'Privacy Policy', 'Terms of Service', and 'Contact Us'.

The Ticket Detail screen displays all information related to the selected ticket. On this screen, comments can be added by members of the IC team, and your organization can add comments in response.

Tickets are expected to be created for everything ranging from general questions to specific items that need to be remediated.

Key features:

- **Ticket Description** - This is the original ticket description that was entered when the ticket was created.
- **Comments** - All communications entered in the ticket are displayed as comments, including the name of the person who entered the comment as well as a date & time stamp.
 - These comments are used to answer questions, provide feedback, etc.
 - Note that when a ticket is first created, a comment will automatically be created with details of who created the ticket and when.
- **Assigned to** - This is the user currently responsible for responding to the ticket or following up on the latest comments. Please be sure to update this as needed if a ticket is assigned to a different user.

Additional details shown on this screen include:

- **Status** - The statuses currently supported are 'Open' and 'Closed'.
 - Clicking the 'Mark as Closed' or 'Re-Open' button updates the status of the ticket accordingly.
 - Each time you click 'Mark as Closed' or 'Re-Open', you will be prompted to enter a comment as well.
- **Due Date** - This is the requested due date or response date.

8. Submission and Review

Once responses to all criteria have been entered and the 'Assessment Response Completion' is 100%, it will be possible to submit the Assessment for review.

This functionality is currently disabled, pending updates based on Release 2 of the Assessment Framework.