



Archives & Records  
Association

# Professional Development Programme

## Website user guide

Welcome to this user guide. It is designed to help candidates and their mentors use the professional development programme website. Please read the [programme guidance](#) before using this guide so that you are familiar with the process to qualify as a Foundation or Registered member, or Fellow of the ARA.

The ARA's [professional development programme website](#) is supported by Survey Monkey Apply (SMAApply) who recommend that you use Chrome or Firefox browsers when using the programme website.

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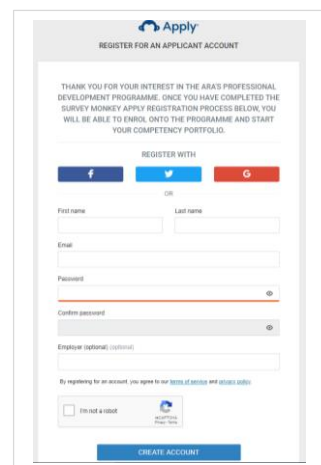
# Candidate guide

## Register with Survey Monkey Apply (SMAApply)

Before you can enrol onto the ARA’s professional development programme you must first create an account with Survey Monkey Apply (SMAApply).

Select the **register** option in the top right corner of the programme website. Enter your name and email address and select **create account**.

If you have already created a SMAApply account to use another SMA product, for example, TNA’s Archive Service Accreditation scheme or Survey Monkey, then you can log in using that email address and password if you prefer.



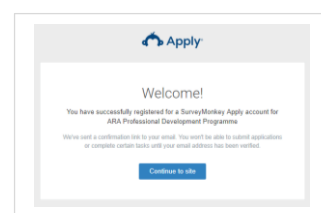
**i** A SurveyMonkey Apply account with this email address already exists. If this is your account, please enter your existing password below to continue. If you have forgotten your password, reset it using the link below.

If you are advised that an account with your email address already exists, then we recommend you register with an alternative email address. Resetting your

SMAApply password may impact on your access to other SMAApply products.

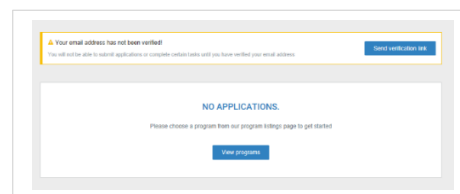
Alternatively, please check directly with SMAApply using the information icon in the top right corner.

Once you have selected create account you will then receive confirmation that you have successfully registered, and an email will then be sent to your address from SMAApply. You will need to respond to this email to verify your email address, which completes the registration process, before you can submit your application for assessment.



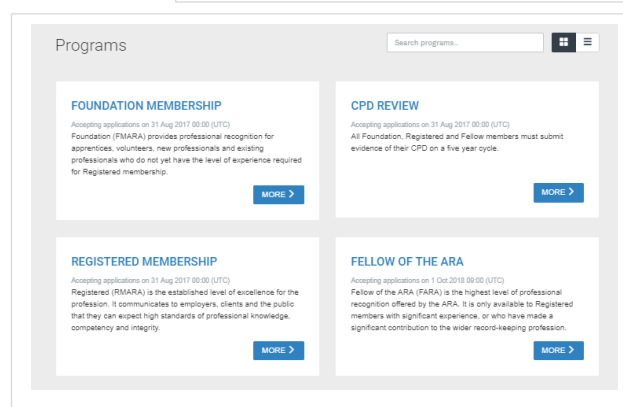
## Selecting Foundation, Registered and Fellow programmes and CPD Review

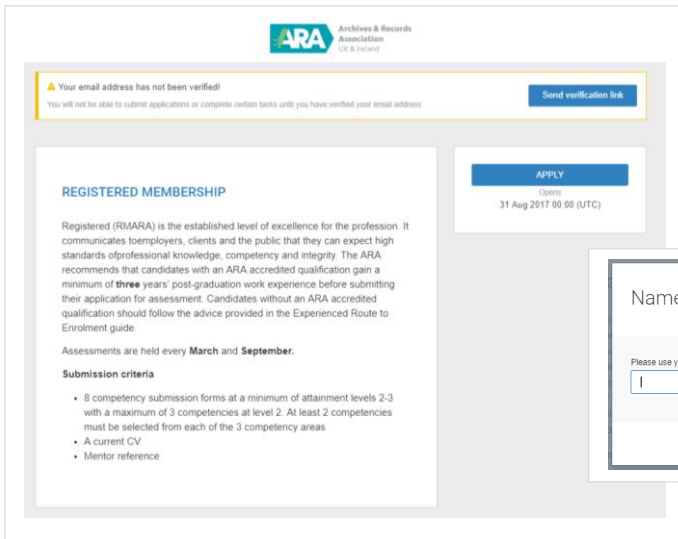
Once you have registered with SMAApply select **view programs** to return to the home page. From here you can select **Foundation, Registered, Fellow** or **CPD Review** to learn more about each programme and its criteria.



Select your chosen programme (Foundation, Registered, Fellow or CPD Review) to open your application and begin the enrolment process. Please note that CPD Review does not require members to enrol.

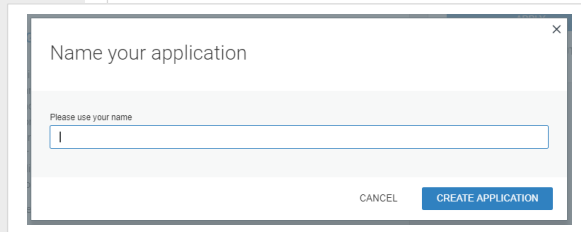
In this example we will choose Registered Membership. The process is the same for Registered and Fellow.





Select **apply** to open your Registered Membership application.

You will need to name your application. Please use your name as the title, then select **create application**.

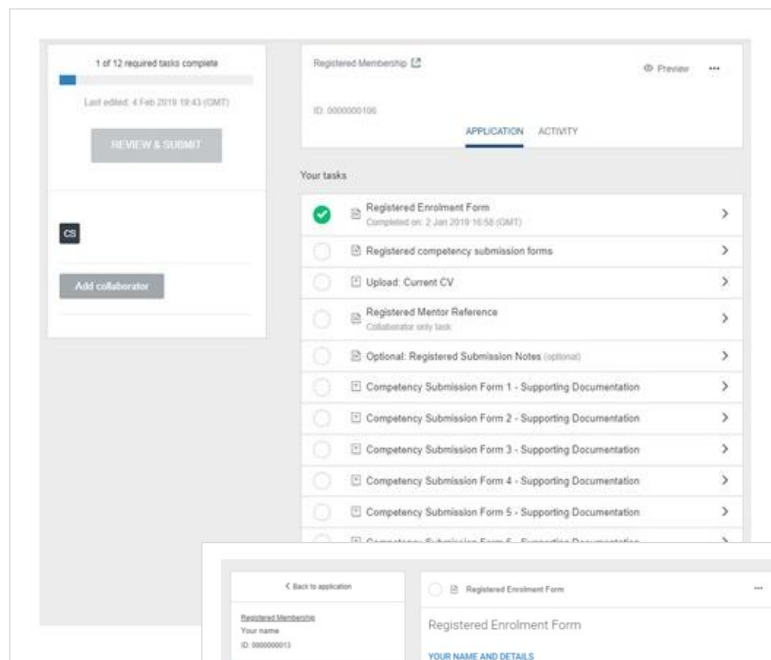


## Your application

Once you have created your application, you will be able to see the tasks that must be completed before you can submit it for assessment. The email verification reminder banner remains visible at the top of the screen until you respond to SMApplY's registration verification email.

Each application task is listed below. A green circle with a white tick will appear after each task is completed. The progress bar will also change.

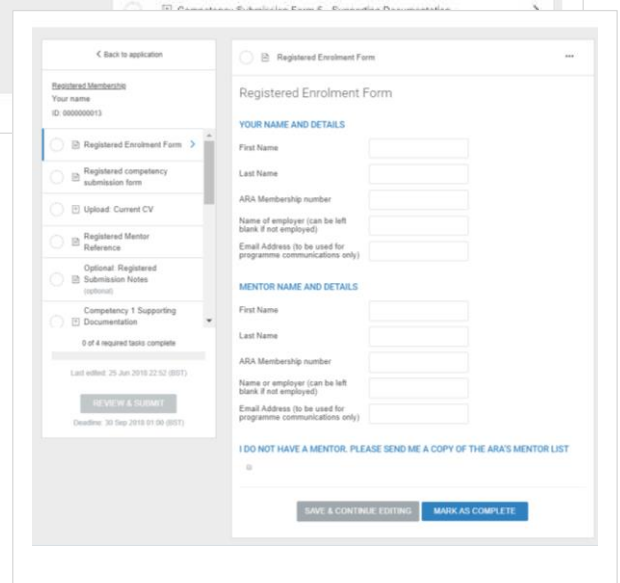
- Enrolment form
- Competency forms
- Current CV
- Mentor reference
- Supporting documentation



## Programme enrolment

Select **enrolment form** from the task menu. Please enter your name, membership number, name of employer and email address. We will use this address to keep you updated with programme news and updates. If you have a mentor then enter their name and email address.

If your mentor is not a member of the ARA, or they do not know their membership number, then just add four zeros ('0000') into the membership number textbox.



If you do not have a mentor then you can request a copy of the ARA's mentor list by selecting the option in the enrolment form. This will be sent to you once you have completed the enrolment form, selected **mark as complete** and paid the enrolment fee.

When you return to the application screen you will notice a green circle with white tick next to the enrolment form option, indicating it is now a completed task. The task progress bar also indicates that one task has been completed.

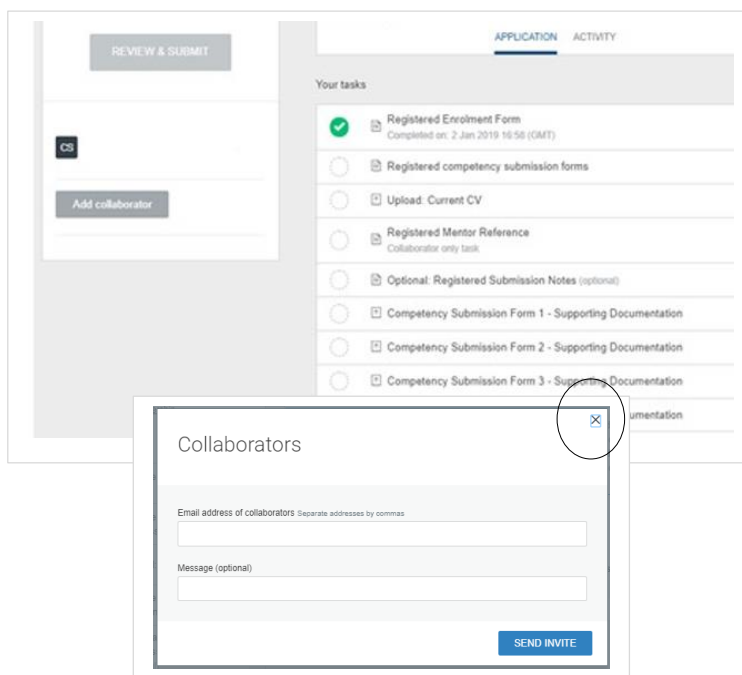
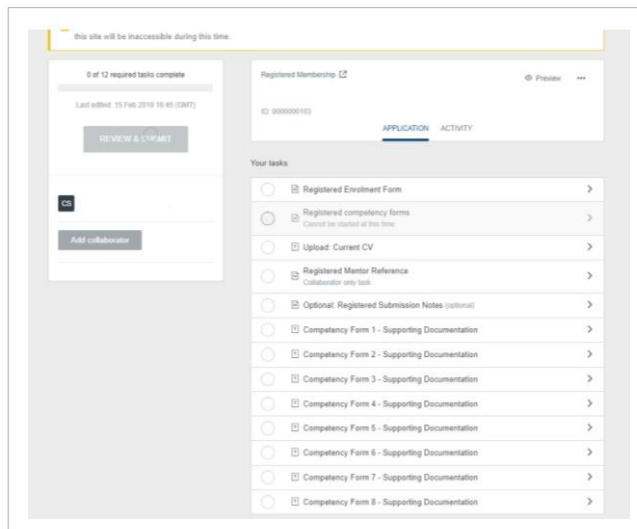
If you do not complete the enrolment process, then the competency form option will remain greyed out with the message *'cannot be started at this time'*. You will not be able to start your application until the enrolment process has been completed.

### Inviting your mentor as a collaborator

To invite your mentor to collaborate with your application you will need to invite them to register with SMAApply as your collaborator.

To the left of the screen, below the **review and submit** option, is the option to **add collaborator**. Select this to invite your mentor by entering their email address. You also have the option of adding a personalised message, which will be embedded into the automated invitation email. Select **send invite** to complete this process. Click the **X** in the top right corner (circled) to return to the previous screen.

Once registered, your mentor will be able to access your competency application, view its contents, add comments into each competency form, and submit their mentor reference.



## Competency forms

Open your first competency form by selecting **competency forms** from the task menu.

The first part of the form asks you to provide the competency reference number and title (e.g B4 *appraising and disposing of records*), the level of experience demonstrated (e.g Level 2) and the period which the development took place (e.g January 2016 to March 2017).

The form contains the following headings: **context**, **activity**, **progression & learning**, **reflection** and **follow up**. There is a 1000 word limit for each form (1500 limit with Fellowship applications) so make sure you focus the majority of your content under the **Activity**, **Progression & Learning** and **Reflection** headings.

You can enter text directly into the form or paste text from another source. Select **save & continue editing** to ensure content is saved. If **next** is selected, then you will be able to open a new competency form. Please note that your content is automatically saved.

You will not be able to open a new competency form until text has been entered into each text box. The text does not necessarily need to be a draft version of the final content. You may prefer to enter a small number of random letters which will be sufficient to then open the next form. This option is helpful if working on more than one competency form at a time.

We advise that you enter the name of your chosen competency, with the level of experience claimed, in each form you open. This will ensure that you always know which competency form you are working on. Scroll through the forms by selecting **previous** or **next**.

As each form is opened, the progress bar at the top of the form increases until the required number of forms have been completed (6 or 8 depending on the level of membership you are applying for). Once you have completed the required number of competency forms, give each form a final review before you **mark as complete**. If you **mark as complete**, but spot an error, select the three dots at the top of the form (circled) and choose **edit** from the drop down menu. You will then be able to edit the form. When finished, **mark as complete**.

Further guidance on completing the form is provided in the [programme guide](#), including an example of a completed competency form.

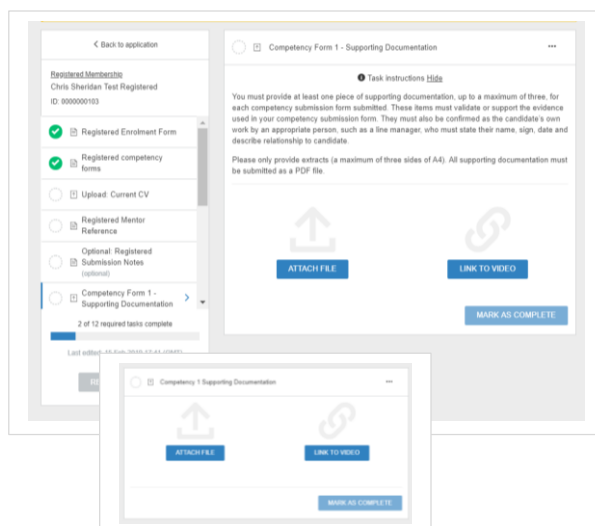
The screenshot shows a web interface for a competency form. On the left, a sidebar menu lists various tasks: 'Registered Membership', 'Registered Exemption Form', 'Registered competency forms', 'Upload Current CV', 'Registered Mentor Reference', 'Optional Registered Submission Notes', and 'Competency Form 1 - Supporting Documentation'. The main area displays the 'Registered competency forms' page. At the top, it says 'Please use the ASA Competency Framework Summary to guide you in the below selections'. The form is divided into sections: 'COMPETENCY INFORMATION' (with fields for reference number, title, and level), 'CONTEXT' (with a text box for a brief outline), 'ACTIVITY' (with a text box for a brief description), 'PROGRESSION & LEARNING' (with a text box for a summary of skills), 'REFLECTION' (with a text box for reflection on activities), and 'FOLLOW UP' (with a text box for application of skills). At the bottom, there are buttons for 'SAVE & CONTINUE EDITING' and 'NEXT'. A circled three-dot menu icon is located at the top right of the form.

## Attaching supporting documentation

You must submit at least one piece of supporting information, up to a maximum of three, for each competency form.

You are free to use any items that you feel will support and validate the content of each form. Further guidance is available from the [programme guide](#).

Select the competency you would like to attach the evidence to and then select **attach file** or **link to video**. Then **mark as complete**.



## Your CV

To attach your CV select **Upload: Current CV**. You should submit your current CV and ensure that it covers the work periods that you have used in your competency forms. Once you have attached your CV select **mark as complete**.

## Mentor reference

The mentor selects the mentor reference task and then either types in their reference, or copies across pre-written content. This task should be started once you have completed your competency forms. The mentor marks this as complete when finished. You will be able to read their reference.

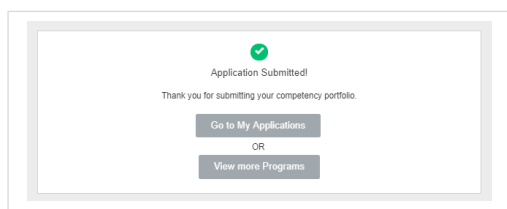
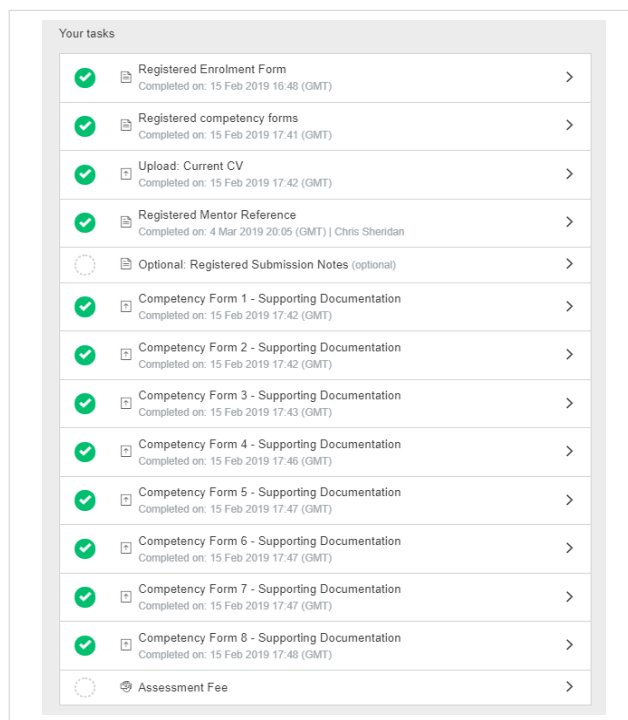
## Completing and submitting your application

Once all tasks are complete the progress bar will be full, and green circles with white ticks will appear next to each task.

The assessment fee task will now appear at the bottom of the task list. Payments are made via Paypal.

Once the payment has been received, the **review and submit** option becomes active. Once selected, you will have the opportunity to review your application and download a copy before you submit your application for assessment.

Your application is now submitted for assessment. Good luck! You will be advised of the outcome of your assessment via the email address used to register with the website.



# Mentor Guide

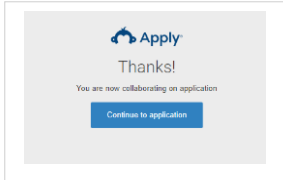
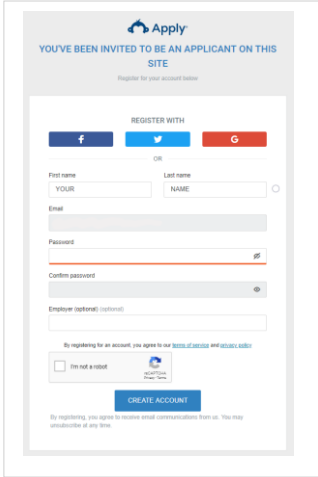
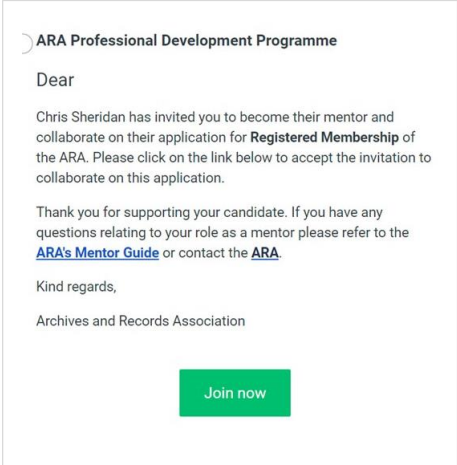
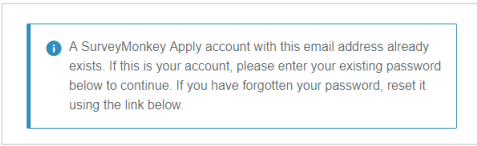
## Mentor registration

Mentors must register with the programme website before they can access their mentee's application, support their development, and submit the mentor reference. Mentors are advised to read the [programme guidance](#) available from the website to familiarise themselves with the programme.

Once your mentee has enrolled onto the programme you will receive an automated email from [noreply@smapply.io](mailto:noreply@smapply.io) or [Default@smapply.io](mailto:Default@smapply.io). This email will invite you to collaborate<sup>1</sup> on your mentee's application. The email includes a link to the **guidance for mentors** published on the programme website. Your mentee has the option of including a personalised message, which will appear in italic text.

Select **join now** to begin your mentor registration. Complete the registration form and create a password which you will then use to log into the website whenever you need to. If you have already created a SMAApply account to use another SMA product, for example, TNA's Archive Service Accreditation scheme or Survey Monkey, then you can log in using that email address and password if you prefer.

If you are advised that an account with your email address already exists, then we recommend you register with an alternative email address. Resetting your SMAApply password may impact on your access to other SMAApply products. Alternatively, please check directly with SMAApply using the information icon in the top right corner. Select create account to complete the registration process. You will then receive a confirmation message. Select continue to application, which will then open your mentee's application screen.



## Your mentee's application

You now have access to your mentee's application and its contents. The application will contain either 6 or 8 competency forms, depending on whether your mentee is applying to qualify as a Foundation or Registered Member. You can access each form by selecting **competency forms** and scrolling through them.

Please note that you will not be able to scroll through forms that have not yet been opened by your mentee.

<sup>1</sup> Collaborator is Survey Monkey terminology for an ARA mentor.



The green semi-circle indicates that a particular task has started (circled). A green circle with a white tick indicates that the task has been completed.

Your mentee has the option of using the submission notes task to plan the content of their competency forms and any development they might need. Any notes made here can be read by selecting the **submission notes** option. Please note that when the application is submitted for assessment, the submission notes will not be included.

## The competency forms

Mentors can open and read their mentee's competency forms, and make edits to the content.

We recommend that edits or comments added by mentors are made inside two brackets [ ] and include your initials and date before your comments/additions. This will help you and your mentee find them, and allow support to be given at times convenient to both parties. Mentor edits should be removed by the mentee before their application is submitted for assessment.

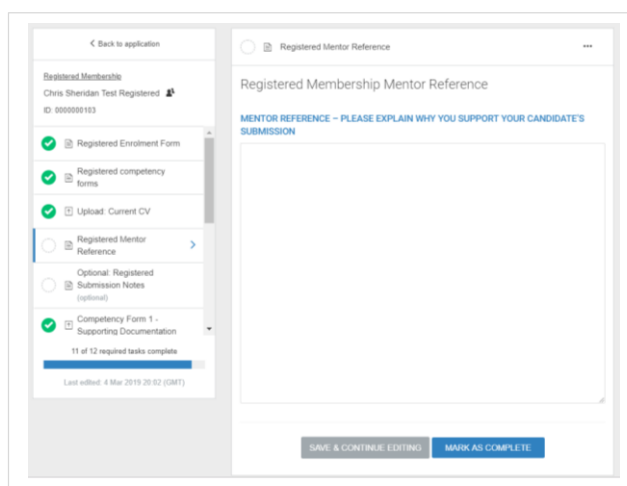
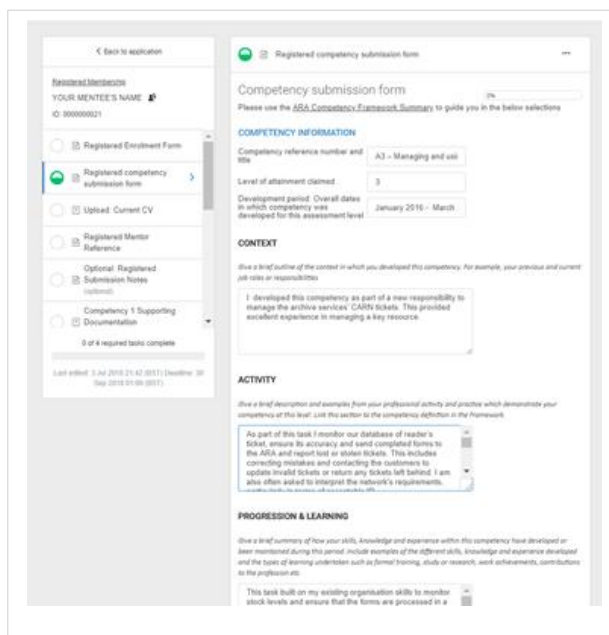
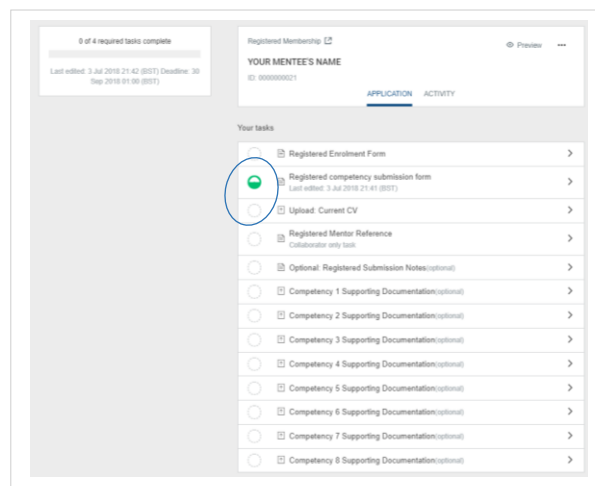
Any edits made should form part of the regular discussion between mentor and mentee.

## The mentor reference

Select the **mentor reference** task in your mentee's application. You may prefer to produce a draft first, and then paste it into the online form, or begin drafting the text into the online form. The choice is yours but please be aware your candidate will see any drafting of your reference.

Mentor references must be written and presented in accordance with instructions given in the ARA's [Guidance for Mentors](#).

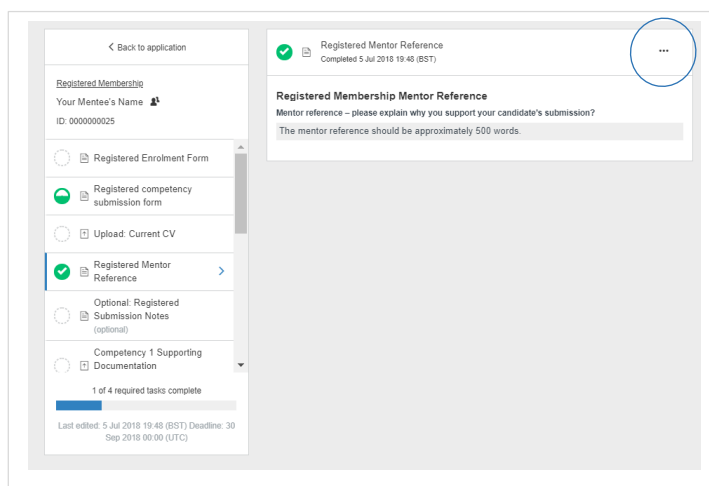
You have the option to **save and continue editing** if you are drafting the reference, and intend to return to complete it at a later date.





When your reference is completed select **mark as complete**. A green circle with a white tick indicates that the task is completed. Note the three small dots in a row (circled). Selecting this option allows you to reset the reference and start again, make additional edits, and download a copy for your own records.

The mentor reference should be the last task to complete. Please advise your mentee when you have completed the reference so that they may submit their application for assessment.



### Information and contact

The professional development programme website provides the following information and support:

- The ARA competency framework documents (<https://archivesandrecords.smapply.io/res/p/competencies/>) including the framework summary and organisational, process and customer/stakeholder competency and level descriptions.
- Professional Development Programme guidance and information (<https://archivesandrecords.smapply.io/res/p/programme-guidance/>) including the programme guide, website user guide and guidance for mentors.

Additional support will be added to these pages when available.

The ARA's programme manager also provides guidance to support candidates and mentors, as well as those interested to learn more of the programme and how it can help them progress in their career. The ARA is happy to support employers by arranging workshops with staff to discuss all aspects of the professional development programme. To contact the programme manager please email [chris.sheridan@archives.org.uk](mailto:chris.sheridan@archives.org.uk). For further information, please visit the ARA's website.

Please note that candidates and their mentors will receive occasional updates by email advising them of new guidance, reminders of submission dates, and other information relating to the professional development programme. The ARA will use the email address used during registration and enrolment.

All enquiries on the programme and programme website should be made to the programme manager [chris.sheridan@archives.org.uk](mailto:chris.sheridan@archives.org.uk) or 07377 940696.

ARA Professional Development Programme website user guide February 2019.