IRCM

Institute of Registered Case Managers

CPD Accreditation Service
Application Information for Representatives
Version 1

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1.0 Purpose

This guidance provides procedural information for IRCM representatives (hereafter referred to as 'representatives') involved in the administration, evaluation and quality assurance of applications to the IRCM CPD Accreditation Service (ICAS). It applies to members of the Evaluation Team, Accreditation Panel and the Operations Team who support the accreditation process.

This guidance is intended for internal use by IRCM representatives. It should be applied alongside the CPD Accreditation Service Information for CPD Providers and the Accreditation Terms and Conditions to ensure that all applications are evaluated consistently and in accordance with IRCM policy.

This guidance should be read in conjunction with:

- the CPD accreditation service information for CPD providers;
- the ICAS Expression of Interest Form;
- the ICAS Application Form;
- the ICAS Evaluation Outcome Form;
- the ICAS Template Accreditation Outcome letter
- the Standards of Proficiency in Case Management;
- the Case Management Competency Framework.

1.1 Role of the ICAS accreditation process

Accredited CPD will be:

- consistent with IRCM standards, competencies and values;
- high-quality, relevant, and effective to contemporary case management practise; and
- in alignment with IRCM's mission to safeguard the public.

ICAS is not a developmental consultancy service. Representatives should distinguish between identifying where published accreditation criteria have not been met and advising applicants how to redesign or improve their CPD. Feedback should explain why a criterion has not been met but should not prescribe how it should be addressed.

2.0 Roles and responsibilities

IRCM's accreditation process is supported by clearly defined roles and responsibilities to ensure that applications are administered, evaluated and approved consistently, fairly and transparently. Responsibilities are separated between the Accreditation Panel, the Accreditation Panel Chair, Evaluation Teams, the

Operations Team and the Professional Development Committee to maintain appropriate independence between administration, evaluation, moderation and governance.

2.1 Accreditation Panel and Chair

The Accreditation Panel plays a central role in the IRCM accreditation process, supporting the consistent application of independent, evidence-based professional judgement in accordance with the IRCM Accreditation Framework.

The Panel comprises evaluators with appropriate expertise in case management, education and training. The pool of panel members is small enough to promote consistency in decision making but large enough to ensure a broad range of knowledge, expertise, and availability. The pool of potential panel members may be reduced for an application because of actual, potential or perceived conflicts of interest in accordance with IRCM's Conflicts of Interest Policy.

The Chair of the Accreditation Panel provides moderation and oversight of evaluation decisions to promote consistency in the interpretation and application of IRCM's accreditation criteria and standards. Where there is an actual, potential or perceived conflict of interest in relation to the Chair of the Accreditation Panel or they are unavailable this role will be undertaken by the Chair of the Professional Development Committee or an unconflicted Panel Member who has not formed part of the Evaluation Team.

On completion of an evaluation, the outcome is presented to the Chair for moderation and final decision. The Chair does not ordinarily undertake a separate evaluation of the application but may seek clarification or further consideration where necessary to ensure that the decision is appropriately evidence-based, procedurally sound and consistent with the Accreditation Framework.

Where due diligence identifies a matter that may affect the suitability of granting or maintaining accreditation, the matter will be referred to the Chair for consideration by the Operations Team.

2.2 Evaluation Team

Applications for CPD accreditation are allocated to an Evaluation Team by the Operations Team taking account of relevant expertise and any conflicts of interest. Evaluation Teams will normally comprise two evaluators with appropriate expertise.

Where an application relates to a highly specialised area, a third evaluator may be consulted.

Evaluation Teams exercise independent professional judgement and assess applications against IRCM's published accreditation criteria and standards. Guidance and standardised evaluation tools are provided for evaluators to support objective scrutiny, consistency and transparency. On completion, the Evaluation Team's decision is presented to the Chair of the Accreditation Panel for review and approval.

The Evaluation Team is responsible for:

- evaluating applications for accreditation against IRCM's published criteria and standards;
- reaching fair, consistent, evidence-based and proportionate decisions that supports public protection and confidence in case management learning and development;
- providing clear, evidence-based feedback to applicants, including identifying where accreditation requirements have not been met;
- reviewing and re-evaluating accredited CPD, including applications for re-accreditation, in accordance with IRCM processes; and
- advising the Professional Development Committee on matters relating to accreditation policy, standards, and quality improvement.

Evaluation Team members must maintain appropriate independence and must not provide consultancy advice to applicants or advise them on how to redesign an application or CPD activity. Feedback should be limited to identifying the relevant accreditation requirement and explaining where or why the evidence provided does not demonstrate the requirement has been met.

2.3 Operations Team

The Operations Team is responsible for the administration and coordination of the accreditation process, including:

- receiving and logging applications;
- undertaking administrative checks to confirm that applications are complete before evaluation;
- undertaking proportionate due diligence in accordance with IRCM procedures;
- coordinating the allocation of applications to Evaluation Teams;
- supporting representatives with procedural queries;
- supporting communications with applicants; and
- maintaining the accuracy of the log of accredited CPD.

Due diligence is intended to identify any legal, regulatory, ethical or reputational matters relating to the CPD provider or the CPD activity that may affect the suitability of granting or maintaining accreditation.

Due diligence is separate from the educational evaluation of the application. The Operations Team does not evaluate applications against the accreditation criteria and does not participate in evaluative decision-making. Any concerns identified through due diligence that may be relevant to an accreditation decision will be referred to the Accreditation Panel Chair for consideration.

2.4 Governance and oversight

Oversight for the accreditation of education, training, and CPD rests with the Professional Development Committee (PDC). Its responsibilities include reviewing and updating accreditation criteria, processes, and documentation to ensure that they remain appropriate and reflect evolving best practice.

The Professional Development Committee may seek feedback and advice from the Accreditation Panel to inform the continuous improvement of the accreditation framework.

The Professional Development Committee Chair does not ordinarily evaluate individual applications or participate in accreditation decisions. However, they may consider matters relating to an individual application or accredited provider where:

- a significant legal, regulatory, ethical or reputational concern identified through due diligence requires escalation; or
- the Chair of the Accreditation Panel has an actual, potential or perceived conflict of interest and an alternative decision-maker is required.

The Professional Development Committee does not ordinarily evaluate individual applications or participate in accreditation decisions. However, they may consider matters relating to an individual application or accredited provider where:

- a matter raises a significant or novel issue of interpretation, policy or precedent;
- a complaint concerns the conduct or integrity of the accreditation process and cannot appropriately be resolved through the usual operational arrangements; or
- a matter is otherwise referred to the Committee in accordance with IRCM's policies and procedures.

Any committee member with an actual or potential conflict of interest must declare that conflict and take no part in its consideration or determination in line with IRCM's Conflicts of Interest Policy.

Feedback and complaints relating to the administration or operation of the accreditation process will be used, where appropriate, to support continuous improvement of the accreditation framework. Complaints about the administration or conduct of the accreditation process will not, in themselves, constitute grounds for reconsideration of an accreditation decision.

3.0 Principles for evaluation and decision-making

When evaluating applications, representatives should be guided by the following principles:

- Evidence-based assessment: recommendations must be supported by evidence from the application and accompanying documentation. Representatives should not make assumptions or rely on information obtained from sources outside the application unless requested to do so as part of the accreditation process.
- Proportionality: expectations should be appropriate to the type, scope, and scale of the CPD activity.
- Consistency: comparable applications should be treated similarly, while allowing for professional judgement where context differs.
- Objectivity: personal preferences should not influence decisions. Decisions should be based on IRCM standards and competencies.
- Impartiality: representatives must undertake evaluations objectively and declare any actual, potential or perceived conflicts of interest before commencing an evaluation.
- Public protection: where learning content or practice raises concerns about potential harm or risk, this must be clearly identified and appropriately mitigated.

4.0 The accreditation process

The accreditation evaluation process consists of a number of stages.

4.1 Preliminary discussion

Upon receipt of an expression of interest form if it is unclear whether the CPD is within the scope of the accreditation process, the provider may be invited to attend a

preliminary discussion of up to 30 minutes to establish whether the proposed CPD activity might be suitable for accreditation and to explain the accreditation process, requirements and expectations. Participation in a preliminary discussion does not guarantee that an application will proceed to formal evaluation.

4.2 Initial review of a submitted application

The initial review will not commence until IRCM has received payment and all completed documentation.

Before allocation to an Evaluation Panel, the Operations Team conducts due diligence and confirms that the application is complete and that the appropriate fee has been received.

The allocated Evaluation Team members review the application and supporting evidence independently of each other.

Applicants are expected to clearly reference the location of evidence supporting their claims. Representatives should not spend disproportionate time searching large documents for evidence. Where evidence is insufficiently signposted, clarification should be requested from the applicant via the Operations Team.

4.3 Moderation and recommendation

Following independent review, the Evaluation Team will meet to moderate their findings and agree a single evidence-based recommendation. Moderation should ensure that differences in professional judgement are discussed and resolved by reference to the published accreditation criteria and the evidence provided.

Moderation supports fairness, consistency, and objectivity, and allows for professional discussion where differing judgements arise.

Where minor amendments are required, the Evaluation Team will nominate one member of the team to review the applicant's updates and determine whether the required amendments have been satisfactorily addressed. Where necessary, the reviewer may seek advice from the second evaluator or the Accreditation Panel Chair.

The Evaluation Team's recommendation is submitted to the Accreditation Panel Chair for review and approval. The Chair may seek clarification from the Evaluation

Team before confirming the outcome. Where the Chair is conflicted the Professional Development Committee Chair or another Panel Member will undertake this duty.

4.4 Accreditation outcomes

Accreditation decisions should be proportionate, evidence-based and consistent with the published accreditation criteria. Where amendments are required, representatives should clearly distinguish between mandatory requirements that must be addressed before accreditation can be awarded and recommendations intended to support future enhancement. Following evaluation and moderation, the Evaluation Team will recommend an outcome to the Panel Chair who will decide on one of the following outcomes:

a. Accreditation granted

Recommend where all accreditation criteria have been met.

b. Minor amendments required prior to accreditation

Recommend where the application broadly meets the accreditation criteria but clarification, additional evidence or limited amendments are required and these can reasonably be verified without a full re-evaluation.

- The required amendments will be clearly specified so that the applicant can address them. Amendments must be submitted within 20 working days of notification of decision.
- A maximum of two attempts to submit minor amendments are permitted. If the requirements are not met following the second attempt, the application will be rejected.
- See section d for details of the revised application process following rejection.

c. Major amendments with resubmission required

Recommend where material changes are required before the CPD can meet the accreditation criteria.

The applicant should submit a revised application addressing the identified requirements.

- Where the package does not currently meet the requirements and significant changes are required, the applicant may resubmit the application for repeat evaluation. The amended application must be submitted within 60 working days of the notification of decision or it will attract additional fees (see section e).
- A maximum of one resubmission following major amendments is permitted. If major amendments are still required following resubmission, the package will be rejected.

- If minor amendments are required following resubmission, the process set out in section b will be followed, but a maximum of one attempt to submit the required minor amendments is permitted before the application is rejected.
- See section d for details of the revised application process following rejection.

d. Accreditation rejection

- Accreditation will be rejected where:
  - the maximum number of permitted amendment or resubmission attempts has been reached;
  - the CPD does not meet the accreditation criteria; or
  - there are concerns relating to quality or public protection.
- Where an application has been rejected, one revised application may be submitted within 60 working days of the notification of the decision at 50% of the additional package rate.
- The submission of a revised application does not alter the date on which the three-year period commenced for the purposes of determining future package rates.

e. New application

- The below are chargeable as a new application:
  i) a new application;
  ii) a revised application submitted more than 60 working days after the date of rejection; and
  iii) a revised application that has already been submitted once at a cost of 50% of the additional package rate following a rejection.
- Where an application is within the existing three-year period, the additional package rate will apply. Where the three-year period has ended, the first package rate will apply.

4.5 Use of the ICAS evaluation outcome form

Representatives must record their evaluation using the ICAS Evaluation Outcome Form. Feedback should:

- clearly reference the relevant accreditation criteria;
- provide sufficient rationale to enable the applicant to understand how the conclusions were reached;
- ensure comments are constructive, proportionate and capable of withstanding external scrutiny; and
- be written in clear, professional, and non-judgemental language.

Representatives should ensure that feedback is:

- evidence-based and linked to the published accreditation criteria;
- objective, impartial and professionally expressed;
- constructive and proportionate;
- sufficiently detailed to explain how the evaluation judgement was reached; and
- suitable for sharing directly with the applicant.

Representatives should avoid subjective opinions or recommendations that are not supported by the evidence submitted.

For each accreditation criterion:

- select the outcome that best reflects the evidence provided;
- summarise the strengths identified where appropriate;
- explain the rationale for the evaluation;
- clearly identify any mandatory amendments required; and

Where a criterion is assessed as only partially met or not met, the rationale should clearly explain why.

Mandatory amendments should:

- clearly describe what must be changed;
- relate directly to the accreditation criterion;
- be proportionate to the issue identified; and
- enable the applicant to understand what evidence will be required when responding.

Mandatory amendments should only include requirements necessary for accreditation.

The Overall Evaluation Summary should provide a balanced overview of the application by:

- recognising key strengths;
- identifying any recurring issues;
- explaining the reasons for the overall recommendation; and
- signposting the applicant to the detailed feedback provided throughout the form.

Before issuing the Evaluation Outcome Form to the applicant, representatives should ensure that:

- all internal notes and drafting comments have been removed and the final version of the Evaluation Outcome Form contains only information intended for the applicant.
- the recommendation and feedback have been reviewed and approved in accordance with the IRCM moderation and sign-off process;
- the Minor Amendments Response Form is included where the outcome is Minor amendments required before accreditation can be granted;
- where the outcome is Major amendments with resubmission required, the applicant is issued with a blank CPD Accreditation Application Form to support the resubmission process;
- where a further fee is payable, the appropriate invoice has been issued in accordance with the IRCM CPD Accreditation Fee Schedule;

5.0 Communicating outcomes

The Operations Team will communicate the outcome to the CPD Provider and will provide supporting documentation as appropriate.

Where an application for accreditation is approved, the Operations Team will add the CPD to the log on the website.

6.0 Confidentiality, data handling and intellectual property

Information from CPD providers will be made accessible to the minimum number of people required to conduct the process. Applications will be made available only to Evaluation Team members and to the Chair (or should they be conflicted the person undertaking their role) and not to the wider Panel.

Documents will only be accessible to Panel Members for the duration of their involvement in the assessment process and will be secured on IRCM’s system and limited by this to online review only with no download facility.

Representatives must maintain the confidentiality of all application materials and use them solely for the purposes of accreditation, quality assurance and governance.

Learning materials remain the intellectual property of the provider unless otherwise agreed and must not be copied, shared or used for any purpose unrelated to the accreditation process.

Representatives must comply with IRCM's Privacy Policy and any applicable data protection legislation when handling personal information.

7.0 Support for ICAS Evaluation Team and Panel Members

The Operations Team is available to support Representatives throughout the evaluation process, including procedural clarification and administrative coordination. All contact with Applicants outside of the Preliminary Discussion will take place via the Operations Team.

Where representatives identify complex issues or uncertainties in interpretation, these should be raised during moderation or with the Chair. Representatives who are uncertain about any aspect of the accreditation process, including interpretation of the criteria or potential conflicts of interest, should seek advice before finalising their recommendation.

8.0 Quality Assurance

All applications for CPD accreditation are administered by the Accreditation Panel, which reports to the Professional Development Committee.

Quality assurance includes moderation of evaluations, periodic review of evaluation outcomes, monitoring of consistency across Evaluation Teams and oversight of the accreditation framework by the Professional Development Committee.

ICAS and its associated processes, materials, and resources are subject to periodic review to maintain relevance, robustness, and proportionality.

Feedback is gathered from CPD applicants, learners, and representatives to inform ongoing quality improvement.

Version	Date	Amendments
1	October 2026	First issued
Review date: October 2027		

Annex 1 Accreditation outcome letter

This letter should be sent with the following attachments:

- accreditation terms and conditions;
- accredited CPD logo (if approved); and
- CPD Accreditation Publicity and Marketing Guidance (if approved)

Name
Address

Date

Dear XXX

Thank you for submitting your application to the IRCM CPD Accreditation Service (ICAS) for the following CPD activity:

CPD title: [Title]
Provider: [Organisation name]
Date of application: [Date]

Your application has now been reviewed by an ICAS evaluation team and moderated in line with IRCM's accreditation processes and criteria. Following this review, the Accreditation Panel has reached the outcome set out below.

Accreditation outcome
[WRITER TO DELETE AS APPROPRIATE – ONE OPTION ONLY]
Accreditation granted
The evaluation team have determined that the CPD activity meets the IRCM accreditation requirements. IRCM CPD accreditation is therefore awarded for this activity.

Further information regarding the duration of accreditation, use of the accredited CPD logo, and inclusion on the IRCM register of accredited CPD will be provided separately.

Minor amendments required before accreditation can be granted
The evaluation team have determined that the CPD activity broadly meets the IRCM accreditation requirements. However, a small number of minor amendments are required before accreditation can be confirmed.

Details of the required amendments are set out in the attached ICAS Evaluation Outcome Form.

If you wish to proceed with the process, please submit your response to the required amendments, together with any supporting evidence, within 20 working days of the date of this letter. Information on how to submit amendments is included in the evaluation documentation.

Once the amendments have been reviewed if they are confirmed as meeting the requirements, accreditation will be awarded.

Major amendments required (resubmission)
The evaluation team has determined that the CPD activity does not currently meet the IRCM accreditation requirements and that material amendments are required before accreditation can be considered.

Details of the required amendments are set out in the attached ICAS Evaluation Outcome Form.

If you wish to continue with the process, you may submit one full resubmission of the application free of charge making the required changes. Any subsequent resubmissions are subject to repeat evaluation and will incur an additional fee, in line with the ICAS fee structure as set out in Annex 1 of the CPD Accreditation Service Information for CPD Providers.

Accreditation rejected
The evaluation team has determined that the CPD activity does not meet the IRCM accreditation requirements. As the application has reached the maximum number of permitted amendment or resubmission attempts, accreditation cannot be awarded.

Details of the decision are set out in the attached ICAS Evaluation Outcome Form. The Panel's feedback is provided to support transparency and to explain how the decision was reached against the published accreditation criteria. IRCM is unable to provide consultancy, advice or guidance beyond the feedback set out in the evaluation documentation. If you believe there has been a procedural error that has materially affected the accreditation outcome, you may request a procedural review in accordance with the IRCM CPD Accreditation Service Information for CPD Providers.

Thank you for your engagement with the IRCM CPD Accreditation Service.

Kind regards,

Chair of the Accreditation Panel

IRCM

Institute of Registered Case Managers

Charnwood House, Harcourt Way, Leicester, LE19 1WP
hello@ircm.org.uk
www.ircm.org.uk

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