



CACREP

Accreditation Management System (AMS)

Program Liaison Manual

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Welcome to the Accreditation Management System (AMS) Program Liaison Manual. This manual will go over how to log into the AMS, key functions of the AMS, and information on the reports/forms currently available to complete in the AMS.

For more information regarding specific Self-Study Report instructions, please visit our AMS Resource Page: <https://www.cacrep.org/ams-resource-page/>.

Please note that all screenshots within the manual are from a fictional institution. The AMS is continuously evolving; some screenshots may not align with the current visuals of the system. While the appearance might change, the functionality remains the same.

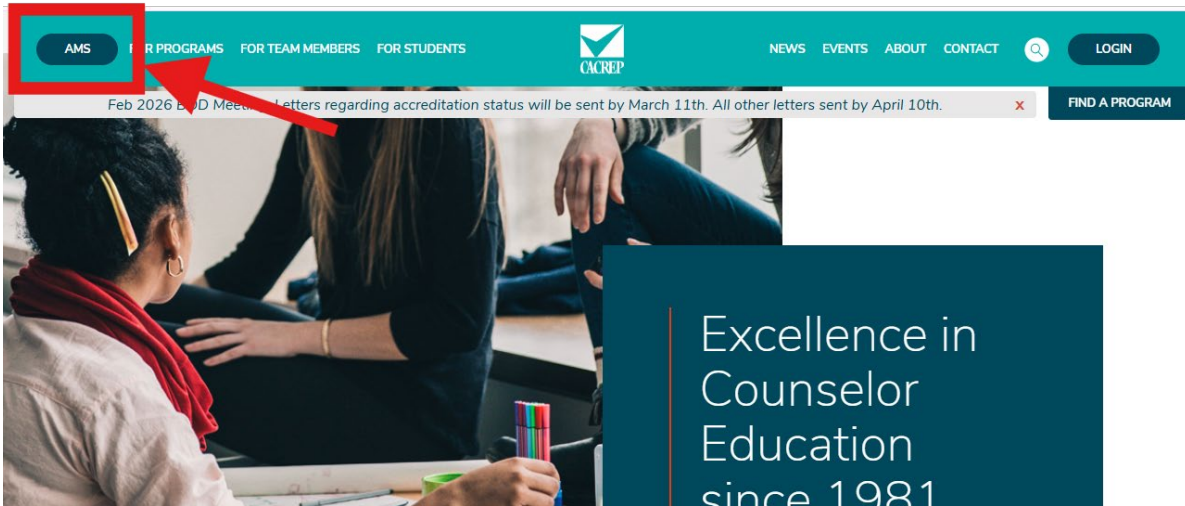
What is an Accreditation Management System?

An Accreditation Management System (AMS) is a one stop shop for viewing institution information and for completing and submitting reports/forms. In the AMS, you can view institution and program information; view due dates and statuses for required reports; update user contact and institution profile information; and access templates for online report/form development and submission. The system also allows uploading supporting documentation directly into the online reports/forms.

Logging In

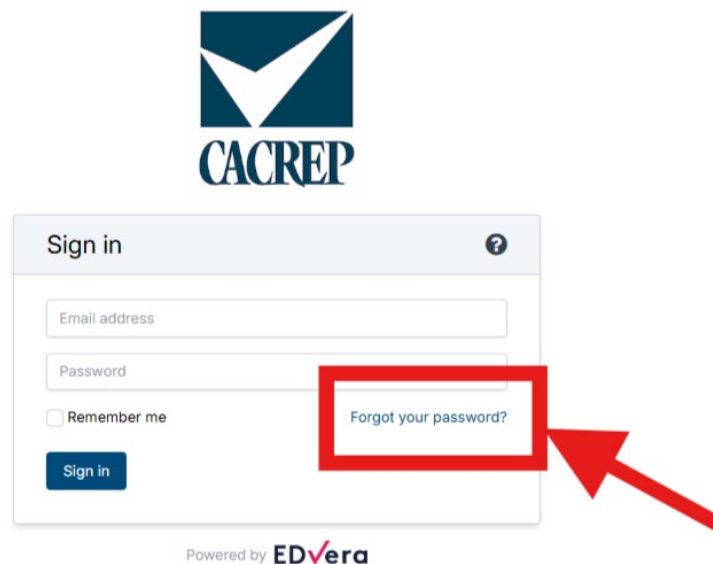
It's your first time logging into the system – what do you do?

First you will follow this link to the AMS: <https://cacrep.edvera.com>. The AMS works best in the Chrome browser. We recommend favoriting or bookmarking this link so it's easily accessible. You can also connect to the AMS from our [website](#):



You will need to set up a password when logging in for the first time.

Once you are on the AMS sign in page, click on the “Forgot your password?” link. You will be prompted to enter your email. Please enter your **institutional email address**, not your personal email address.



To set a password, you will receive a password reset email. This email will come from either noreply@edvera.com or cacrep@edvera.com. If you do not receive this email, please check your email spam folder. If it is not there, it is possible your university's email system is not accepting the email. In this instance, you will need to work with your university's IT unit to whitelist those email addresses for AMS emails to be received.

Once you receive the password reset email, you will be able to create your password.

Who Can Access the AMS?

The initial set-up of the system primarily allows access and provides functionality to the CACREP Program Liaison. The Department Chair can also access the system and has limited permissions to start and submit certain forms.

Program Liaison: can start and submit all available reports/forms.

Department Chair: can start and submit Dashboard Update, People-Update or Confirm Designated Roles, and People-Update or Confirm Contact Information forms as well as view all submitted and unsubmitted reports/forms.

Deans and Presidents: can access the system to view their Institution's profile.

Programs can elect to add additional users from their institution to the system as either viewers (i.e., read-only) or editors (i.e., start-edit-submit). To add a user as either a viewer or editor, Program Liaisons can email vgray@cacrep.org with the subject line "Adding Editor or Viewer" to request the addition. Similarly, if a Program Liaison would like their Department Chair to be able to edit reports, and either their Dean or President to be able to view or edit reports/forms, please email vgray@cacrep.org with the subject line "Allow Department Chair, Dean or President Editor or Viewer Access."

Since you are only able to see the Program Liaison, Department Chair, Dean and President on your Institution's profile, you must keep track of who you request to be either an Editor or Viewer. If you would like to remove an Editor or Viewer please email vgray@cacrep.org with the subject line "Remove Editor or Viewer".

What Am I Seeing Once I Log In?

There are 2 main tabs on the left-hand side that you will see once you log into the AMS:

- The First is the Documents tab (#1). This tab is where you will start, edit, view, and submit all of your reports/forms.
- The Second is the Institution tab (#2). This tab holds all of your Institution's information regarding your contacts, program/specialty information, reports due/received dates, fee status, decisions history, and more (Clicking on the Institution tab will display two more tabs: Profile and Program).

The screenshot displays the AMS interface for 'TEST College EDITED Documents'. The left sidebar contains a navigation menu with 'Documents' (1) and 'Institution' (2) tabs. At the bottom left, there are 'Notifications' (3), 'Help & Support' (4), and 'Logout' (5) options. The main content area shows a table of documents with the following data:

Name	Status	Created At	Updated At
2016 Standards Institutional Response to the Site Review Team's Report	Unsubmitted	11-19-2025 09:23 AM	11-19-2025 09:24 AM
2016 Standards Institutional Response to the Site Review Team's Report	Reverted	03-27-2025 09:52 AM	05-15-2025 11:22 AM
2016 Standards Institutional Response to the Site Review Team's Report	Reverted	03-27-2025 10:46 AM	06-04-2025 03:26 PM
2024 Policies and Standards Exceptions Request	Unsubmitted	05-28-2025 06:21 PM	06-24-2025 01:32 PM
2024 Policies and Standards Exceptions Request	Unsubmitted	10-23-2025 09:01 AM	10-23-2025 09:01 AM
2024 Policies and Standards Exceptions Request	Unsubmitted	02-10-2026 02:05 PM	02-10-2026 02:05 PM
2024 Standards Follow-up Report	Unsubmitted	02-10-2026 11:33 AM	02-10-2026 11:33 AM
Dashboard Update Form	Expire	05-28-2025 06:20 PM	09-02-2025 04:22 PM
Dashboard Update Form	Unsubmitted	10-27-2025 02:21 PM	10-27-2025 02:21 PM
People - Confirm or Update Contact Information	Expired	05-28-2025 06:19 PM	09-02-2025 04:14 PM
People - Confirm or Update Designated Roles	Expired	05-28-2025 06:19 PM	09-02-2025 04:15 PM

In the bottom left you will see the Notifications (#3), Help & Support (#4), and Logout (#5) tabs. The Notifications tab will allow you to see when your report/form has been updated; the Program Liaison will also receive an email with these notifications. Currently only a few reports/forms have these notifications set up. We will be working to get notifications set up for every report/form moving forward.

Institution Tab

The Institution **Profile** tab contains a broad array of institution and program information. At the top you will see general information and a list of program contacts in designated roles (i.e., President, Dean, Department Chair, Program Liaison) as well as their email address. You will also see an email – staffsupport@cacrep.org – under “Contacts” where you can send any questions about the AMS or your accreditation.

TEST College EDITED Status **Active**

Institutional Information

Billing ID
TEST1234

Institution Name
TEST College EDITED

College/School
School of Arts & Sciences

Dept/Academic Unit
Department of Psychology and Human Services

Program Address
1234 College Street
Freud Building
Worcestershire, MA 33333

Program Phone Number
555-555-5555

Multiple Locations?
Yes

Program Website
<http://www.test.edu>

Contacts

Please contact CACREP staff support at staffsupport@cacrep.org with any questions.

Program Liaison
Dr. TEST3User TESTthree

Program Liaison Email
testuser3@testinguniversity.edu

Department Chair
Dr. TESTJI-Yoon TESTKim

Department Chair Email
testdeptchair@testcollege.edu

Dean
TESTSigmund TESTFreud

Dean Email
testdean@testinguniversity.edu

President/CEO
TestPresident TESTUser

President/CEO Email
testpresident@test.edu

Program/Specialty Information

As you scroll down, you will see information about your specialized practice area(s) and/or doctoral program, including the cycle end date and accreditation statuses; a list of reports with their due and received dates fee status; consultant authorization (if applicable); a list of institutional/program characteristics; and information on decisions history.

Program/Specialty Information

Program Name	Set of Standards	Specialty Status	Secondary Status	Cycle End Date
Clinical Rehabilitation Counseling	2016	Accredited	Reaffirmation in Process	07/31/2026
Addiction Counseling	2016	New Applicant	New Applicant In Process	
Career Counseling	2009	Previously Accredited	<ul style="list-style-type: none"> • Withdrawn • Withdrawn 	03/31/2019

Report Due Dates

CACREP

TEST College EDITED

- Documents
- Institution
 - Profile
 - Programs

Notifications

Help & Support

Logout

VG Vivian Gray

Report Due Dates

Dates presented here are for general reference only. Please double check all due dates here with the information included in your official accreditation decision- or process-related communication. If you note any discrepancies in the dates information, please contact your CACREP Staff POC for clarification.

Type of Report	Due	Received	Notes
Application and Self Study Report (SSR)	03/30/2025	03/20/2025	
SSR Addendum	-	05/14/2025	
Response (IR) to Site Visit Report	11/10/2025	11/17/2025	Due date extended 1 week per program request to allow for internal mtgs
Progress/ Interim Report	-	-	
Monitoring/ Midcycle Report	-	-	
Exceptions/Waiver Request Report	-	-	
Substantive Change Report	-	12/01/2025	Program to report on change in college which houses the counselor education program.
Extension Request	-	-	
Follow-up Report	-	-	
Digital Delivery Report	-	-	
Vital Statistics Report	12/15/2025	-	Due every year by Dec 15th
Other	-	-	

Fee Status

Application Fee Paid

03/27/2025

Site Visit Fee Paid

-

Consultant Authorization

Consultant Start

Consultant Start

12/15/2025

Consultant End

06/13/2026

Consultant Name

TESTUser TESTOne

Consultant Auth?

Discuss with CACREP Staff

Consultant Email

testuser1@user.com

Consultant Phone Number

IHE Characteristics

Number of Graduate Students

Number of Graduate Students

152

CSI Chaper

No

Institutional Accreditor

Higher Learning Commission (HLC)

ACES region

North Atlantic Region

Setting

Suburban

Funding Status

Private

Size of Institution

Small (<5000 students)

Legal Status

Not for Profit

Carnegie Designation

Teaching

Special Designation

HSI (Hispanic Serving Institutions)

Faith Based

No

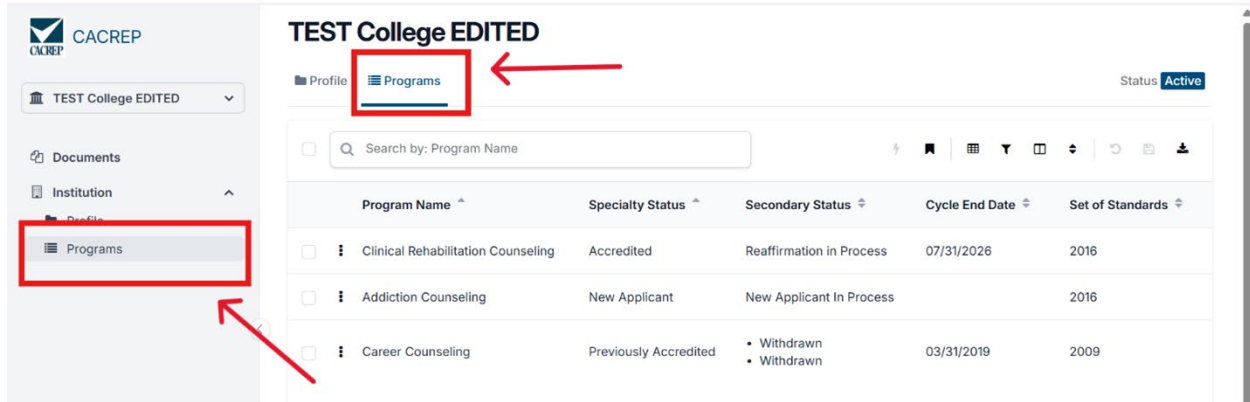
Decisions History

2024 January: Review type: Interim report; Decision: Accreditation continued (CLRC)

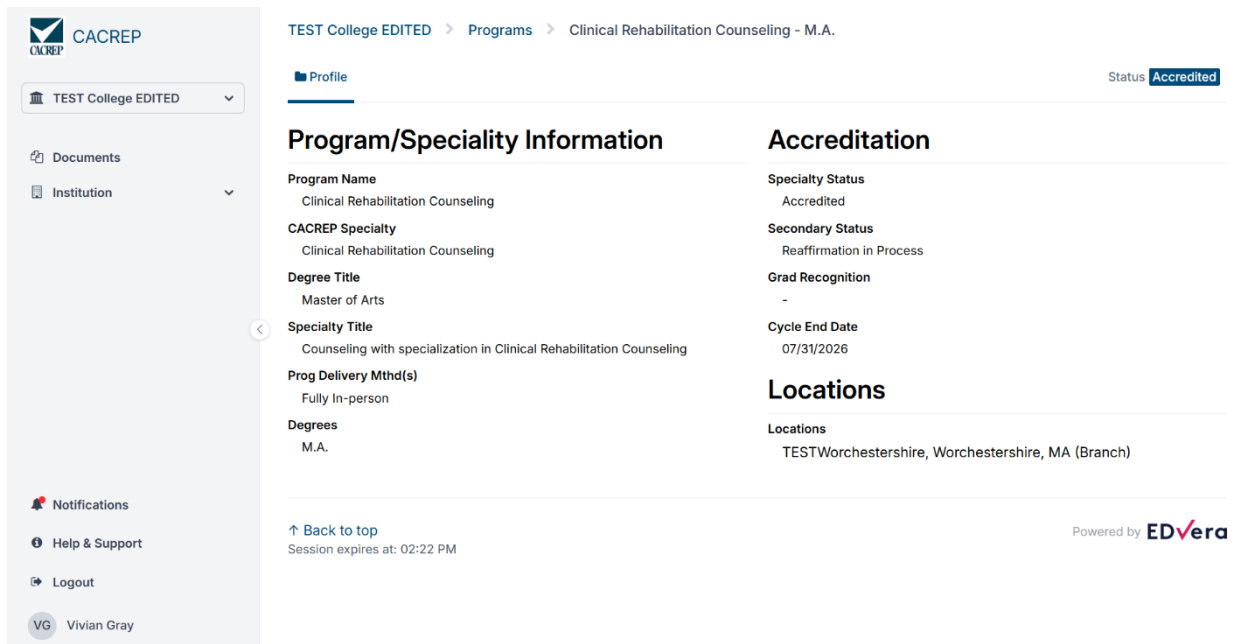
2022 January: Accredited (CLRC); Interim Report Required; BOD approved additional retroactive recognition for CLRC graduates to 7/9/2020

Please note that CACREP is continuing to populate fields with historical information, and some fields will be updated periodically as new information is available (e.g., Decisions History).

Also, within the Institution tab, the Program Liaison and Department Chair will see a “**Programs**” tab. That is another location where you can see the current status, cycle end date, and set of standards for each specialized practice area and/or doctoral program. The screenshot below shows two ways you can view the Programs tab.



Clicking on a specific program will reveal more information regarding that specialized practice area and/or doctoral program.



Documents Tab

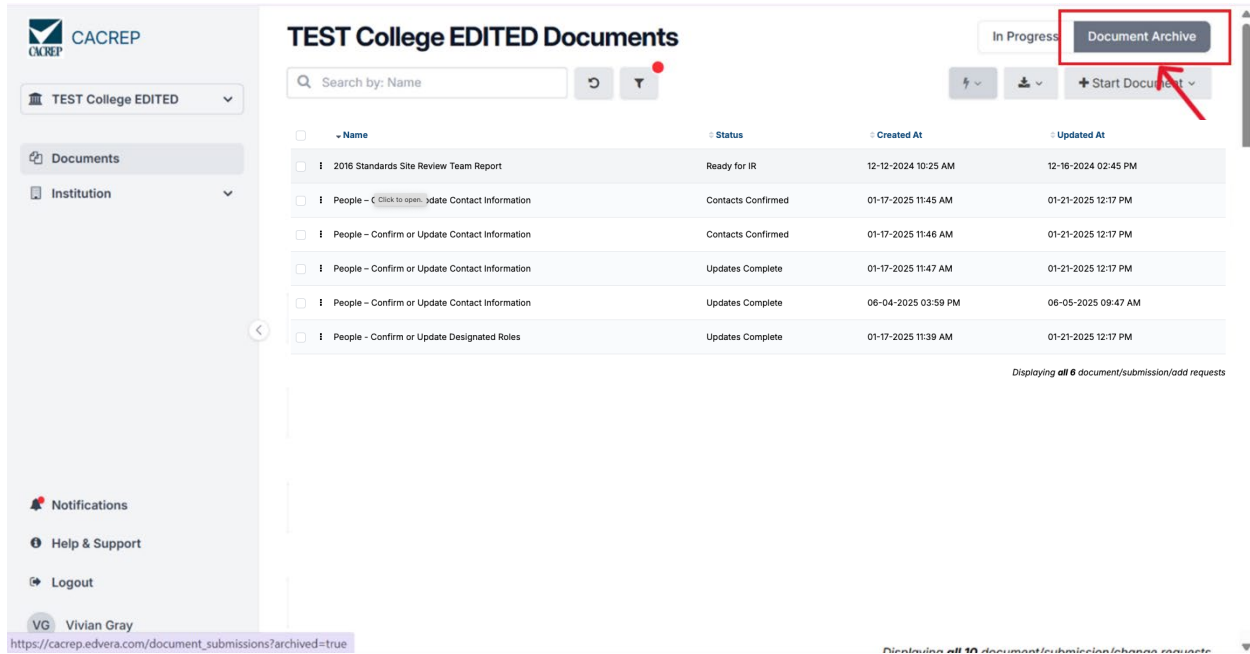
The Documents tab provides access to unsubmitted and submitted forms and reports.

Located on this tab is a “+Start Document” button. Clicking on that button will bring up a list of reports/forms that the user has permission to start. You may have to scroll to see all the report options. Please note that various reports/forms are still in development.

The screenshots illustrate the 'TEST College EDITED Documents' interface. The top screenshot shows the '+ Start Document' button highlighted with a red box and a red arrow pointing to it. A dropdown menu is open, listing various reports and forms such as '2016 Standards Follow-up Report', '2016 Standards Institutional Response to the Site Review Team's Report', '2016 Standards Monitoring/Midcycle Report', '2016 Standards Progress/Interim Report', '2024 Policies and Standards Exceptions Request', '2024 Standards Follow-up Report', '2024 Standards Institutional Response to the Site Review Team's Report', '2024 Standards Progress Report', 'Application for Accreditation or Reaffirmation of Accreditation', 'Consultant Authorization', 'Dashboard Update Form', and 'Extension Request Form'. The bottom screenshot shows the same interface with a table of documents. A red arrow points to the '+ Start Document' button. The table has columns for Name, Status, Created At, and Updated At.

Name	Status	Created At	Updated At
2024 Standards Follow-up Report	Pending Board Reviewer Assignments	03-21-2025 12:59 PM	09-15-2025 10:07 AM
2024 Standards Institutional Response to the Site Review Team's Report	Pending Board Reviewer Assignments	11-25-2025 06:52 PM	12-01-2025 08:53 AM
People - Confirm or Update Contact Information	Expired	07-18-2024 11:51 PM	07-19-2024 10:12 AM

All reports/forms that are in process will appear in the In Progress list, also showing its status. Once a report/form has completed its process and is in its final status, it will move to the “Document Archive” tab.



You will also see the “Status” of your report/form next to the name of said report/form. The “Status” indicates where your report/form is in its process (e.g., Unsubmitted, Pending Board Review, Pending Decision Letter). There are a substantial number of statuses so if you have a question about a specific report/form status, please contact CACREP’s Accreditation and Technology Systems Coordinator, vgray@cacrep.org.

What Reports/Forms Are Available in the AMS?

This is the current list of reports and forms you will see when you click on the +Start Document list:

- 2016 Standards Follow-up Report
- 2016 Standards Institutional Response to the Site Review Team’s Report
- 2016 Standards Monitoring/Midcycle Report
- 2016 Standards Progress/Interim Report
- 2024 Policies and Standards Exceptions Request
- 2024 Standards Follow-up Report
- 2024 Standards Institutional Response to the Site Review Team’s Report
- 2024 Standards Progress Report

- Application for Accreditation or Reaffirmation of Accreditation
- Consultant Authorization
- Dashboard Update Form
- Extension Request Form
- People - Confirm or Update Contact Information
- People - Confirm or Update Designated Roles
- Self Study Report
- Substantive Change Report

NOTE: The 2016 Standards reports will no longer be accepted after May 15, 2026, unless advised otherwise by a CACREP staff member.

Addressing Commonly Asked Questions About Reports

1. **Self Study Report:** Once you select Self Study Report from the +Start Document drop down list, you will see a Template drop down list with all available versions of the Self Study Report template:
 - Entry-Level Only: for use by programs that are **only** seeking accreditation/reaffirmation of accreditation for one or more specialized practice area(s)
 - Entry-Level + Doctoral: for use by programs that are seeking accreditation/reaffirmation of accreditation for one or more specialized practice area(s) **and** a doctoral program
 - Adding Program Entry-Level Only: for use by accredited programs to **add** one or more specialized practice area(s) under the 2024 CACREP Standards
 - Adding Program Entry-Level Only + Doctoral: for use by accredited programs to add one or more specialized practice area(s) **and** a doctoral program under the 2024 CACREP Standards
 - Adding Program Doctoral Only: for use by accredited programs to **add** a doctoral program under the 2024 CACREP Standards

2. Type of Change(s) available in the Substantive Change Report:

- **Change in business ownership**

To report a change in business ownership of the institution. *Note: Accreditation does not automatically and may not transfer in a change of ownership. Please be sure to consult with CACREP staff prior to submitting this report.*
- **Change in core faculty**

To report a) substantial changes in the program’s core faculty, operationally defined as a change of 50% or more of the core faculty members within 12 continuous months, and/or b) changes in the program’s core faculty that lowers the number of core faculty below the minimum number required for your program and for which there is not an anticipated quick return to compliance with approval to begin a hiring search.
- **Change in degree/degree title**

To report a change in degree and/or degree title for any entry-level specialized practice area and/or doctoral program.
- **Change in geographical setting/cohort**

To report a change in geographical setting, including moving a program to a new location (e.g., different department on or off campus) or establishing a new physical site for program delivery, or to report creation of a new off-campus cohort program.
- **Curricular modifications**

To report on substantive changes to the curriculum that represent a significant departure in terms of what courses are required, how required content coverage and/or KPIs/disposition assessment is mapped across the curriculum, and/or the method of delivery for courses from those that were

offered at the last review. In relation to this report, substantive is operationally defined as cumulative changes since the last accreditation or reaffirmation of accreditation review impacting 25% or more of the credit hours of the accredited curriculum.

- **Digital delivery**

To report on adding a fully digitally delivered pathway or fully in-person pathway to the existing delivery pathway(s). You may also use this section to seek approval for transitioning your existing program delivery pathway from what was approved during your last full accreditation review (e.g., transitioning fully in-person delivery to hybrid or fully digitally delivered; transitioning hybrid delivery to fully digitally delivered). Please consult with CACREP staff prior to submitting this report to confirm whether you need to report the change(s).

- **Institutional merger**

To report on a merger of the institution with one or more other institutions.

Note: Accreditation does not automatically and may not transfer in a merger of institutions. Please be sure to consult with CACREP staff prior to submitting this report.

- **Intra-institutional reorganization**

To report on change(s) within the institution affecting the organization, management, or oversight of the counseling program. Examples of changes in this category include but are not limited to the counseling program moving to a different department, school, or college within the current institution or combining counseling programs housed separately within the institution.

- **Sanction on the institution**

To report a sanction on the institution by its institutional accreditor, which has the potential to place the institution's accreditation status at risk for any reason.

- **Teach Out**

To report a teach-out due to specialized practice area(s) and/or a doctoral program closing, a site or delivery method being discontinued, the counseling program as a whole closing or merging, or the institution closing or merging. This section also is applicable to programs electing to continue counseling specialized practice area(s) and/or a doctoral program but allow the CACREP accreditation to lapse.

- **Other**

Use Other to report on any other substantive change(s) not listed above. Be sure to provide responses for all questions in the Overview of Change(s)

section (Tab 2) and any desired additional information in the “Additional Information” section.

NOTE: Some changes may require filling out multiple sections of the report (e.g., seeking to transition a program from one delivery modality to another may require completion of the digital delivery and teach-out sections)

3. 2024 Standards Follow Up Reports:

You can use this report for both 2024 follow up reports **AND** 2024 Standards SSR Addendums.

4. 2024 Policies and Standards Exceptions Request:

You can use this form to report on a state law conflict, to request a policy waiver, or to request reconsideration of a Board decision.

FAQS

How do I change or update my users?

There are 2 forms that are in the AMS that can help you confirm/update your users.

The first is the “People-Confirm or Update Designated Roles” form. You should submit this form **FIRST**, as it allows you to add and remove users from your institution profile.

The second is the “People-Confirm or Update Contact Information” form. You should submit this form **AFTER** the Designated Roles form. This form allows you to confirm or update your user’s contact information. If we misspelled your user’s email, there is a notes box within the Contact Information form where you can let us know.

Please go to Appendix A for more details on how to complete the needed “People” forms.

Can I delete reports/forms?

Yes, with the exception of a Self Study Report, you can delete unsubmitted reports/forms. You can do so by clicking the square box on the left side of the document’s name (#1). Then looking into the top right-hand corner and click on the lightning bolt icon (#2). That icon will display the option to delete selected items.

TEST College EDITED Documents

Search by: Name

In Progress | Document Archive

Name	Status	Created	Updated
2016 Standards Institutional Response to the Site Review Team's Report	Reverted	03-27-2025 09:52 AM	05-15-2025 11:22 AM
2016 Standards Institutional Response to the Site Review Team's Report	Unsubmitted	11-19-2025 09:23 AM	11-19-2025 09:24 AM
2016 Standards Institutional Response to the Site Review Team's Report	Reverted	03-27-2025 10:46 AM	06-04-2025 03:26 PM
2024 Policies and Standards Exceptions Request	Unsubmitted	10-23-2025 09:01 AM	10-23-2025 09:01 AM
<input checked="" type="checkbox"/> 2024 Policies and Standards Exceptions Request	Unsubmitted	05-28-2025 06:21 PM	06-24-2025 01:32 PM
Dashboard Update Form	Expire	05-28-2025 06:20 PM	09-02-2025 04:22 PM
<input checked="" type="checkbox"/> Dashboard Update Form	Unsubmitted	10-27-2025 02:21 PM	10-27-2025 02:21 PM
People – Confirm or Update Contact Information	Expired	05-28-2025 06:19 PM	09-02-2025 04:14 PM
People - Confirm or Update Designated Roles	Expired	05-28-2025 06:19 PM	09-02-2025 04:15 PM
Self Study Report	Unsubmitted	02-27-2025 09:50 AM	02-27-2025 09:50 AM
Self Study Report	Reverted	02-25-2025 09:51 AM	03-20-2025 04:12 PM

If you need to delete a Self-Study Report, please send an email to vgray@cacrep.org with the subject “SSR to delete.” Please include the URL for the SSR in the body of the email by opening the SSR and copying the webpage URL.

Who is my point contact person for CACREP?

For questions about your accreditation or a report, please contact us at staffsupport@cacrep.org. Our Staff Support inbox is monitored by multiple CACREP staff members.

For all AMS related questions who do I contact?

For all AMS related questions please contact the Accreditation and Technology Systems Coordinator, vgray@cacrep.org.

Will our Board of Directors meeting decisions be in the AMS?

Yes. Once the Board of Directors meets and makes an accreditation decision, their decisions will be reflected in the Decisions History at the bottom of your Institution Profile. This will occur once all decisions have been communicated to programs through a formal decision letter.

Where can I find more information on submitting my SSR as well as other reports/forms?

We have an AMS Resource Page on our website: <https://www.cacrep.org/ams-resource-page/>.

Appendix A: Updating Institution Contacts/Users Using the "People" Forms:

What are the two “People” forms?

The two “People” forms are “People-Confirm or Update Designated Roles” and “People-Confirm or Update Contact Information” forms. They are used to keep your program’s users and their information up to date.

Why do I have to complete the “People” forms?

These forms are important since they control the information that CACREP uses to contact you when we have questions, to address and send decision letters, and to keep you informed on all important changes at CACREP.

The Program Liaison oversees keeping the **Program Liaison, Department Chair, Dean, and President/CEO’s** information updated in the AMS using these forms.

When do I complete the “People” forms?

Whenever a change occurs, the Program Liaison must complete these forms, especially if you are passing along the Program Liaison role to another staff or faculty member.

You will also be asked to submit these forms periodically during your Accreditation cycle, and they are required when you submit your program’s Self Study Review (SSR) Packet.

What is the difference between the two “People” forms?

The first is the “**People-Confirm or Update Designated Roles**” form. You should always submit this form **FIRST**, as it allows you to add and remove users listed on your institution’s profile under Contacts.

This form allows you to review and make changes, as necessary, to who is currently listed in the roles of Program Liaison, Department Chair, Dean, and President/CEO.

This first form allows you either to indicate that their names and emails are correct or to make any needed changes. Please be sure

Institutional Information	Contacts
Billing ID TEST1236	Please contact CACREP staff support at staffsupport@cacrep.org with any questions.
Institution Name TEST State University	Program Liaison Dr. TEST4User TESTFour
College/School TESTCollege of Education and Learning	Program Liaison Email testuser4@teststateu.edu
Dept/Academic Unit TESTCounseling and Human Services Hub	Department Chair TESTPerry TESTMason
Program Address 148-G University Boulevard Sal Khan Building, Suite 2011 State College City, CO 11111-2222	Department Chair Email testdeptchair@testinguniversity.edu
Program Phone Number 444-444-4333	Dean Dr. TESTIndiana TESTJones
Multiple Locations? No	Dean Email testdean@teststateu.edu
Program Website http://teststateu.edu/counseling_program	President/CEO TESTSelina TESTMeyer
	President/CEO Email testpresident@testingstateu.edu

to update this information every time a change occurs in one of these designated roles.

The second is the “**People-Confirm or Update Contact Information**” form. You should submit this form **AFTER** you submit the Designated Roles form. This form allows you to confirm or update an individual user’s contact information.

Use this second form to review — and make changes as necessary to — the contact information for individuals in the Program Liaison, Department Chair, Dean, and President/CEO roles for your program, as well as for any other individuals (e.g., individual with an editor role) associated with your program in the AMS. Please be sure to regularly review and update this information.

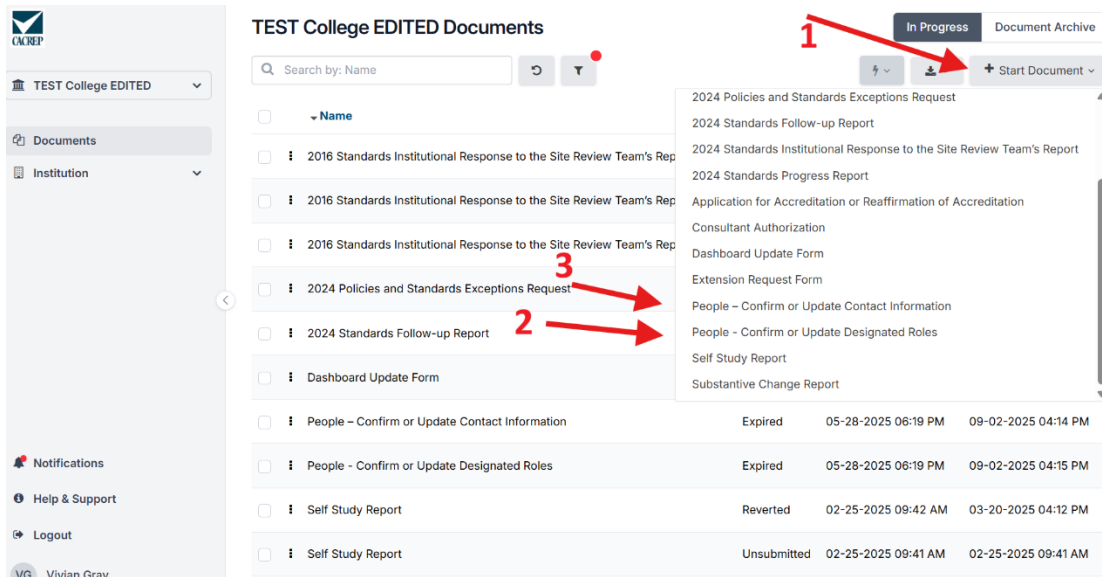
NOTE: If you are updating the person who is in a designated role (e.g., there is a new Program Liaison or Department Chair), you must use the People-Designated Roles form to effect this change. Trying to make this change by changing identifying information such as name and email address in the People-Contact Information form will result in problems within the AMS. These problems, in turn, may result in communication not getting to the correct person.

Where can I find the “People” forms?

The Documents tab provides access to unsubmitted and submitted forms and reports.

Located on this tab is a “+Start Document” button. Clicking on that button will bring up a list of reports/forms that the user has permission to start. You may have to scroll to see all the report options.

Once you click on the +Start Document button (#1) you will scroll down and see both “People” forms listed (#2 and #3).



How do I start the “People-Confirm or Update Designated Roles” form?

When you click on the “People-Confirm or Update Designated Roles” form from the +Start Document drop down, you will see the page shown below with helpful reminders about why and when to use the form.

People - Confirm or Update Designated Roles

You are starting a **People - Confirm or Update Designated Roles form** for TEST College EDITED.

Use this form to review the names of the program contacts at your institution (President/CEO, Dean, Department Chair, Program Liaison). You will be able to indicate any new contacts and confirm which contacts in the system are correct.

If you are reporting changes that have not yet happened, please wait to submit the form until their effective date.

If you need to review or update the contact information for your program's contacts, please use the People - Confirm or Update Contact Information form. If you need to update other information on your Institution Dashboard, please use the Dashboard Update Form.

To get started, please click Continue.

To prevent session timeouts and losing unsaved work, click **Save** often, but at a minimum every 25 minutes. Note, clicking **Save and Proceed** will also prevent a session timeout.

Cancel Continue

[↑ Back to top](#)
Session expires at: 04:34 PM

Powered by **EDvera**

Once you click “Continue” you will find a page that shows your program’s current contacts: Program Liaison, Department Chair, Dean, and President/CEO.

People - Confirm or Update Designated Roles

Print

[Submission](#) [Comments 0](#) [Status Unsubmitted](#) [History](#)

If you are reporting changes that have not yet happened, please wait to submit the form until their effective date.

You can also use this form to confirm that contacts in the system are correct.

If you need to review the contact information for your institution's contacts, please use the **People - Confirm or Update Contact Information form**. If you need to make updates to information not included on either contact-related form, please send an email using the Subject line "AMS Contact Update" with any changes to cacrep@cacrep.org.

Contacts

The current contacts for your institution are shown below. If there is a new person in any of these roles, please click drop down for that role. If the correct person appears in the list, you can select them and the role will be updated. If the new person is not listed, please click the plus sign to the right of the drop down to create a new user. Please note that all users must have an email address connected to your institution.

<p>Dean</p> <p>TESTSigmund TESTFreud (testdean@testinguniversity.edu) +</p>	<p>Program Liaison</p> <p>Vivian Gray (staffsupportvg@cacrep.org) +</p>
<p>President/CEO</p> <p>TestPresident TESTUser (testpresident@test.edu) +</p>	<p>Department Chair</p> <p>Dr. TESTJi-Yoon TESTKim (testdeptchair@testcollege.edu) +</p>

If you used a plus sign to create one or more new users and were not able to enter some of their information, please enter it in the box below.

B I U S | **☰ ☷** | **↶ ↷** | **↺ ↻** | **📎** | **📧** | **📷**

As you scroll through the form you will also see a text box where you can indicate if you were not able to add any information to your new user(s) when creating them.

You will also see check boxes next to the user roles. There you will click on which (if any) users you changed.

If you do not need to update any of your users, you will click on “No, the contact names are correct as presented” and submit the form.

One or more of my users are incorrect – how do I add a new user?

If you notice that one or more of these contacts is incorrect, you can click the down-pointing caret to the right of the incorrect name to see a list of people who are associated with your program. If the name you need to add is not in that list, you will click on the “+” button emphasized in the screenshot below by the red arrow.

form. If you need to make updates to information not included on either contact-related form, please send an email using the Subject line "AMS Contact Update" with any changes to cacrep@cacrep.org.

Contacts

The current contacts for your institution are shown below. If there is a new person in any of these roles, please click drop down for that role. If the correct person appears in the list, you can select them and the role will be updated. If the new person is not listed, please click the plus sign to the right of the drop down to create a new user. Please note that all users must have an email address connected to your institution.

Dean: TESTsigmund TESTFreud (testdean@testinguniversity.edu) +

Program Liaison: Vivian Gray (staffsupportvg@cacrep.org) +

President/CEO: TestPresident TESTUser (testpresident@test.edu) +

Department Chair: Dr. TESTJI-Yoon TESTKim (testdeptchair@testcollege.edu) +

If you used a plus sign to create one or more new users and were not able to enter some of their information, please enter it in the box below.

0 WORDS POWERED BY TINY

Did you make any changes to your program's contacts?

No, the contact names are correct as presented.

Yes, I updated the names for these roles (check all that apply):

- Program Liaison
- Department Chair
- Dean

That will lead you to a page where you will be able to add the new contact's email address. Once you add the new address click on "Next".

New

Please enter the email address of the user you would like to add and click "Next" when you are ready to proceed.

newtestpres@cacrep.org

Next Cancel

↑ Back to top

Session expires at: 04:39 PM

Powered by EDvera

There you will be able to fill out all the new contact’s information. Clicking on “Create” will add them as a user.

The screenshot shows a web form titled "New" for adding a contact. On the left is a sidebar with the CACREP logo, a dropdown menu for "TEST College EDITED", and navigation links for "Documents" and "Institution". The main form fields are: "Personal Prefix" (Dr.), "First Name *" (New Test), "Last Name *" (Pres), "Email *" (newtestpres@cacrep.org), "Institution/Organization" (Test College EDITED), "Title" (President), "Work Phone" (000-0000-000), and "Address" (United States, Test Ave, Unit 0000, Alexandria, Virginia, 22314). At the bottom of the form are "Create" and "Cancel" buttons. A red arrow points to the "Create" button. Below the buttons is a note: "* denotes required field". The footer includes "Powered by EDvera" and "Session expires at: 04:40 PM".

If the user already exists in the AMS, that person’s first and last names will be displayed, and you will be asked if the person associated with that email is the person you want to add to your program’s contacts. If it is the correct person, you can click the Add button. If it is not, please click Cancel and double-check that you typed the email correctly. If you did, please contact Vivian Gray at vgray@cacrep.org for assistance.

The new user will **NOT** automatically replace the old one in the form. You must go back to the drop down and click the caret emphasized by the top red arrow in the screenshot below and select the new user you created from the list.

If you are reporting changes that have not yet happened, please wait to submit the form until their effective date. You can also use this form to confirm that contacts in the system are correct.

If you need to review the contact information for your institution's contacts, please use the **People - Confirm or Update Contact Information form**. If you need to make updates to information not included on either contact-related form, please send an email using the Subject line "AMS Contact Update" with any changes to cacrep@cacrep.org.

Contacts

The current contacts for your institution are shown below. If there is a new person in any of these roles, please click drop down for that role. If the correct person appears in the list, you can select them and the role will be updated. If the new person is not listed, please click the plus sign to the right of the drop down to create a new user. Please note that all users must have an email address connected to your institution.

Dean: TESTSigmund TESTFreud (testdean@testinguniversity.edu) +
Program Liaison: Vivian Gray (staffsupportvg@cacrep.org) +
President/CEO: TestPresident TESTUser (testpresident@test.edu) +
Department Chair: Dr. TESTJi-Yoon TESTKim (testdeptchair@testcollege.edu) +

Dr. TESTConsult TESTTwo (testconsult2@crus.com)
 Dr. TESTNiles TESTCrane (testncrane@testingcollege.edu)
 KC StaffSupport (staffsupport_kc@cacrep.org)
 TestPresident TESTUser (testpresident@test.edu)
 Vivian Gray (staffsupportvg@cacrep.org)
 Dr. TESTJi-Yoon TESTKim (testdeptchair@testcollege.edu)
 Dr. New Test Pres (newtestpres@cacrep.org)

If you were not able to enter some of their information, please enter it in the box below.

Did you make any changes to your program's contacts?
 No, the contact names are correct as presented.

Once all four contacts are displaying the correct names, scroll down and click on "Yes, I updated the names for these role(s) (check all that apply):" You will then click on whichever user(s) you changed. In the final text box, you can indicate the names of any people in the drop-down menus who should be removed from your program. See below for an example.

below.

No, the contact names are correct as presented.
 Yes, I updated the names for these roles (check all that apply):

- Program Liaison
- Department Chair
- Dean
- President/CEO

Please list the names of any contacts in the drop down list who should no longer have access to your institution's information in the system

TEST President

If you need to review and update or confirm the email, title, or other contact information for the people listed above, please submit a **People - Confirm or Update Contact Information** form for each one.

If the four contacts were correct when you opened the form and you made no changes to the contacts for your program, you can click No. You can still list any names that should be removed from your program.

Once you click “Submit” you will see the Status of your form change to “Pending Staff Review”. That means your form was successfully submitted.

People - Confirm or Update Designated Roles Print

[Submission](#) [Comments 0](#) [Status Pending Staff Review](#) [History](#)

If you are reporting changes that have not yet happened, please wait to submit the form until their effective date.
You can also use this form to confirm that contacts in the system are correct.

If you need to review the contact information for your institution's contacts, please use the **People - Confirm or Update Contact Information form**. If you need to make updates to information not included on either contact-related form, please send an email using the Subject line "AMS Contact Update" with any changes to cacrep@cacrep.org.

Contacts

The current contacts for your institution are shown below. If there is a new person in any of these roles, please click drop down for that role. If the correct person appears in the list, you can select them and the role will be updated. If the new person is not listed, please click the plus sign to the right of the drop down to create a new user. Please note that all users must have an email address connected to your institution.

Dean TESTSigmund TESTFreud (testdean@testinguniversity.edu)	Program Liaison Vivian Gray (staffsupportvg@cacrep.org)
President/CEO Dr. New Test Pres (newtestpres@cacrep.org)	Department Chair Dr. TESTJi-Yoon TESTKim (testdeptchair@testcollege.edu)

If you used a plus sign to create one or more new users and were not able to enter some of their information, please enter it in the box below.

N/A

Did you make any changes to your program's contacts?
 No, the contact names are correct as presented

How do I start the “People-Confirm or Update Contact Information” form?

Remember, you should not start this form unless you have confirmed that all of the four main contacts listed in your Institution Profile are correct. If they are not, please complete the People-Confirm or Update Designated Roles form first.

When you click on the “People-Confirm or Update Contact Information” form from the “+Start Document” drop down, you will see the page shown below. Click on the user whose information you want to review.

People – Confirm or Update Contact Information

You are starting a **People – Confirm or Update Contact Information form** for TEST College EDITED.

Use this form to review and update information for program contacts at your institution. You will be able to correct information, if needed, or confirm that the information in the system is accurate.

You will need to submit a separate form for each person being reviewed.

If you need to update other information on your Institution Dashboard, please use the Dashboard Update Form.

Choose the contact you'd like to update and click Continue below:

Select a contact

- Select a contact
- TESTSigmund TESTFreud (testdean@testinguniversity.edu)
- Dr. TEST3User TESTthree (testuser3@testinguniversity.edu)
- TESTReaderUser TESTFive (testuser5@test.edu)
- TESTEditorUser TESTSix (testuser6@someuni.edu)
- KC StaffSupport (staffsupport_kc@cacrep.org)
- TestPresident TESTUser (testpresident@test.edu)
- Vivian Gray (staffsupportvg@cacrep.org)
- Dr. TESTJi-Yoon TESTKim (testdeptchair@testcollege.edu)

Save often, but at a minimum every 25 minutes. Note, clicking Save and

Powered by EDvera

Once you click on the user you want to review and click the Continue button, it will bring up the information CACREP currently has for them. You will also see all the available fields we have that you can fill out.

People – Confirm or Update Contact Information Print

Submission Comments 0 Status **Unsubmitted** History

If you are reporting changes that have not yet happened, please wait to submit the form until their effective date.

You can also use this form to confirm that the information in the system is correct.

If you need to change the person listed on your institution dashboard in a specific role, please use the **People - Confirm or Update Designated Roles form** to update the name. If you need to make updates to information not included or editable on either contact-related form, please send an email using the Subject line "AMS Contact Update" with any changes to cacrep@cacrep.org.

Contacts

Please make any needed updates to the information below.

Email

staffsupportvg@cacrep.org

Prefix

Name

Vivian

Middle Name

Gray

Suffix

Suffix

The screenshot shows a web form for editing user information. On the left is a sidebar with the CACREP logo, a dropdown menu for 'TEST College EDITED', and navigation links for 'Documents', 'Institution', 'Notifications', 'Help & Support', 'Logout', and a user profile for 'VG Vivian Gray'. The main form area contains the following fields: 'Suffix' (text input), 'Title' (text input with 'Staff Support' pre-filled), 'Work Phone' (text input), 'Country' (dropdown menu with 'Choose a country' selected), 'Street 1' (text input), 'Street 2' (text input), 'City' (text input), 'State' (dropdown menu), and 'Zip' (text input).

NOTE: we request that you add the user’s “Title” if it is not already there. For example: if you are reviewing your Department Chair’s information and their title is not included please add it using this formula: Department Chair, Department of Counseling.

This screenshot shows the bottom portion of the form. It includes 'City' (text input), 'State' (dropdown menu), and 'Zip' (text input). Below these is a text area with the prompt: 'Please list any prefix, email, or other changes for this contact you were not able to make with this form.' The text area has a rich text editor toolbar with icons for bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, undo, redo, link, unlink, insert table, insert image, and video. At the bottom of the text area, it says '0 WORDS POWERED BY TINY'. Below the text area is a radio button question: 'Did you need to correct any information for this person?' with two options: 'Yes, I made one or more updates/corrections to this person's information.' (selected) and 'No, this person's information does not need any updates or corrections.' At the bottom are three buttons: 'Save and Exit', 'Save', and 'Submit'. A footer contains a 'Back to top' link, a session expiration notice 'Session expires at: 04:31 PM', and the 'Powered by EDvera' logo.

NOTE: You will NOT be able to change the user’s email address. If you need to change user’s email address please put their new email address in the text box underneath “Please list any prefix, email, or other changes for this contact you were not able to make with this

form.” Remember, If you need to change the email because there is a new person in a specific role, **DO NOT** use the People-Contact Information form, instead you need to use the People-Designated Roles form to update the user in that role, then you can update their information using the People-Contact Information.

When you are done reviewing, changing, or removing the user’s information you will either click on “No” or “Yes” to the question “Did you need to correct any information for this person?”. Once you click “Submit” you will see the Status of your form change to “Pending Staff Review”. That means your form was successfully submitted.

The screenshot displays the 'People - Confirm or Update Contact Information' form. The left sidebar shows the user is logged in as 'Vivian Gray' (VG) and is viewing the 'TEST College EDITED' institution. The main content area has a title bar with 'Download' and 'Print' buttons. Below the title bar, there are tabs for 'Submission', 'Comments' (0), 'Status' (Pending Staff Review), and 'History'. The 'Status' tab is active, and a red arrow points to it. The form text reads: 'If you are reporting changes that have not yet happened, please wait to submit the form until their effective date. You can also use this form to confirm that the information in the system is correct. If you need to change the person listed on your institution dashboard in a specific role, please use the **People - Confirm or Update Designated Roles form** to update the name. If you need to make updates to information not included or editable on either contact-related form, please send an email using the Subject line "AMS Contact Update" with any changes to cacrep@cacrep.org .'

Contacts

Please make any needed updates to the information below.

Email

staffsupportvg@cacrep.org

Prefix

Name

Vivian

Gray

Suffix

FAQS:

My new President/CEO has the same email as the old one – how do I change them?

If your new President/CEO has the same email address as the old one you will be UNABLE to add the new President/CEO using the “People-Confirm or Update Designated Roles” form since the email is already taken by the old President/CEO.

Instead, please email vgray@cacrep.org with the subject line “Cannot add new President/CEO to the AMS” and she will assist you.

What happens when my previous Program Liaison leaves without letting the new acting liaison know?

The Department Chair can complete and submit both “People” forms. They should complete the needed forms if the previous Program Liaison is no longer at the Institution.

Can I add a new user over an old one using the “People-Confirm or Update Contact Information” form?

No. You cannot add a new users’ information over top of an old user’s information. If you do so the form will not be accepted, and the change will not be made. If you need to add a new user please do so using the “People-Confirm or Update Designated Roles” form.

Questions?

For all AMS related questions please contact the Accreditation and Technology Systems Coordinator, vgray@cacrep.org.