

Access the website

<https://sfei.fluidreview.com/>

1. After accessing the Standards for Excellence Institute website, create an account by clicking on the Sign Up button (See Figure 1).



Figure 1 - Dashboard Screen

2. Complete your Profile Information (See Figures 2, 3)

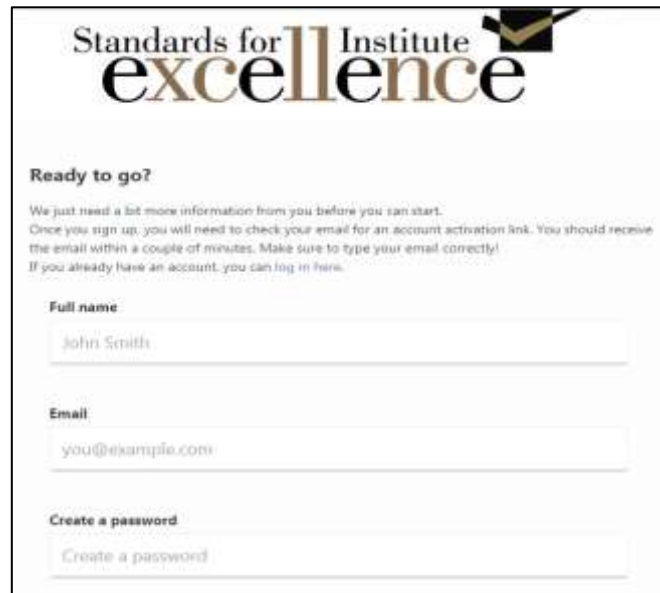
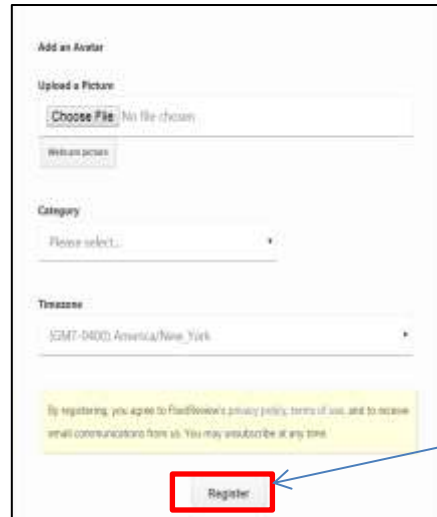


Figure 2 - Profile Screen



The screenshot shows a registration form titled "Add an Avatar". It includes an "Upload a Picture" section with a "Choose File" button and a "No file chosen" message. Below this is a "Category" dropdown menu with "Please select..." as the current selection. The "Timezone" dropdown menu is set to "GMT-0400 America/New_York". At the bottom of the form, there is a "Register" button highlighted with a red rectangle. A blue arrow points from the "Register" button to the "Category" dropdown menu, and another blue arrow points from the "Register" button to the right side of the form.

Figure 3 - Profile Screen

3. For "**Category**" select "**Pennsylvania Applicants.**" After completing your profile information, press the **Register** button at the bottom of the screen.
4. You will receive an email at the address you have provided that will contain a [hyperlink](#) to get back into the system and begin the process.
5. Select **Pennsylvania Applications** from the drop-down menu. When completed, click on the **Sign Up** button. (See Figure 4)



The screenshot shows the "Sign Up" screen for the Standards for Excellence Institute. The page header includes "Home" and "Application Process About Us Using this Website About Accreditation". The main heading is "Standards for excellence Institute" with a checkmark icon. Below the heading, there is a "class" label, a question "Want to get started with Standards for Excellence Institute?", and a "Select a category" dropdown menu with "Pennsylvania Applicants" selected. At the bottom, there is a "Sign Up" button highlighted with a red rectangle.

Figure 4 – Sign Up screen

You will be placed on the New Submission screen. (See Figure 5)

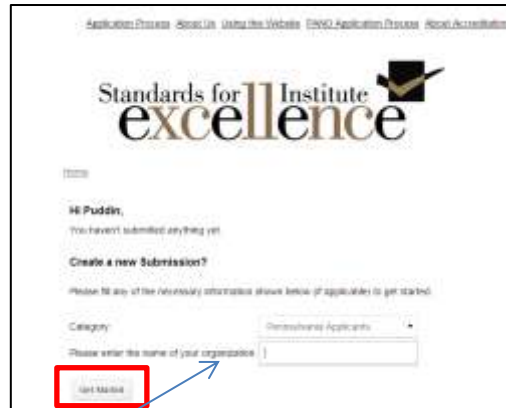


Figure 5 – New Submission screen

6. Enter the name of your Organization. When completed, click on the **Get Started** button.

Your Dashboard screen displays. This screen will also monitor your progression through the application process.

**Note: A blank copy of the application in Microsoft Word format is available on the PANO website:*

<http://www.pano.org/Standards-For-Excellence/Certification/>



Figure 6 - Your Dashboard screen

7. Your progress and next steps are always identified by the shaded boxes at the top of the screen. The next task in the application process is to fill out the Self-Assessment form. ***This is an optional step. If you do not need to this, continue with Step 9.*** If you would like to fill out the Self-Assessment, click on the [Fill out a Self-Assessment Form](#) hyperlink to begin the process. (See Figure 7)

If you choose not to fill out the self-assessment form, click on the [Click here](#) hyperlink in the shaded box under the **My Organization** section to move to the next step.

***NOTE:** If you would like to fill out the Self-Assessment form it must be done during this step in the process. You cannot go back and select the hyperlink at a later time.

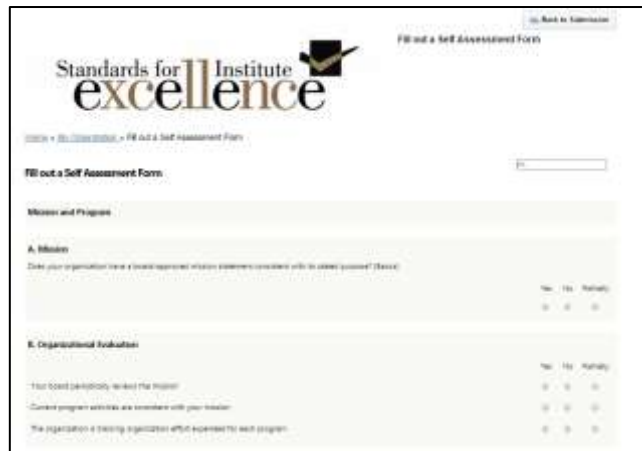



Figure 7 - Self-Assessment Form

8. Complete the Self-Assessment form. At the bottom of the page you will see two buttons:
 - a. **Save & Continue Editing** – Allows you to save information as well as edit any previously entered information on this screen. It will not advance to the next page.
 - b. **Next** – Advances you to the next page. (See Figure 8)

**Note: If any of the questions on the page are incomplete, clicking next will present an error message and direct you to the area which needs to be corrected.*



Figure 8 - Command Buttons

On the last page of the assessment form you will see an additional button to *submit* the form. Press **Submit** to move to the next stage. You will be returned to your Dashboard screen to advance with the application process.

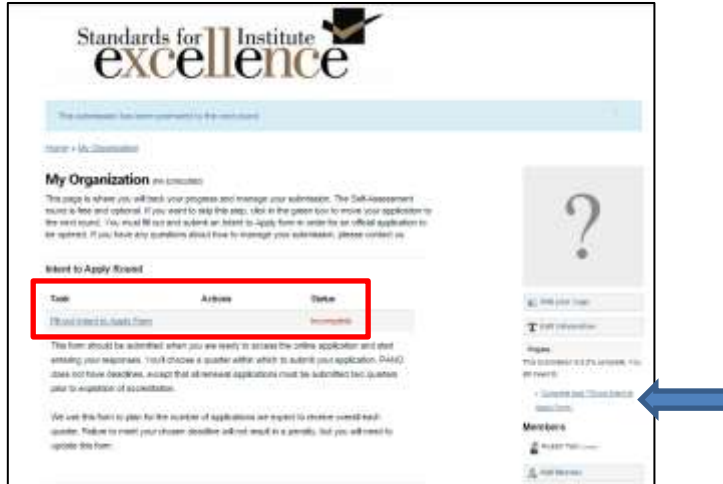


Figure 9 - Dashboard Screen / Intent to Apply form

- On the Dashboard screen, the next task in the process is displayed. Select the [Fill out Intent to Apply Form](#) hyperlink to access this form.

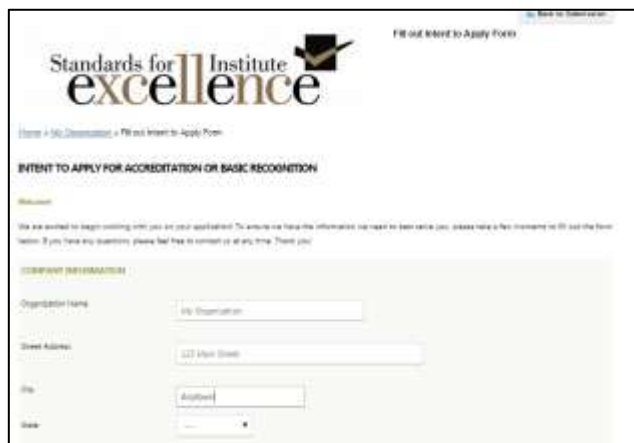


Figure 10 - Intent to Apply form screen



Figure 11 - Intent to Apply Form screen

- Complete the *Intent to Apply Form* with Company Information, Application Information and Expected Submission timing. When done, submit the form. The Dashboard screen displays.

*Note: The screenshots used in these instructions illustrate how to complete a Full Accredited Application however, whether you choose a **Basic** Application or a **Full Accreditation** Application, the process is the same.

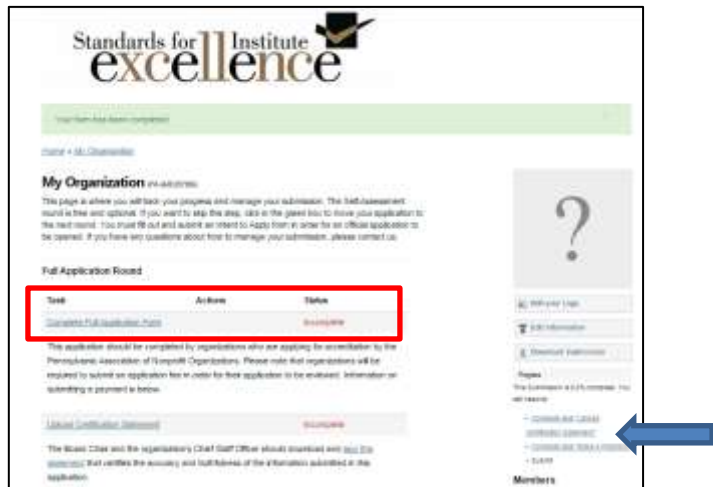


Figure 12 - Dashboard screen

11. On the Dashboard screen, the next task in the process is displayed. Select the [Complete Full Application Form](#) hyperlink to access this form. (See Figure 12)
12. **READ ALL INSTRUCTIONS THOROUGHLY BEFORE YOU BEGIN.** (See Figure 13)

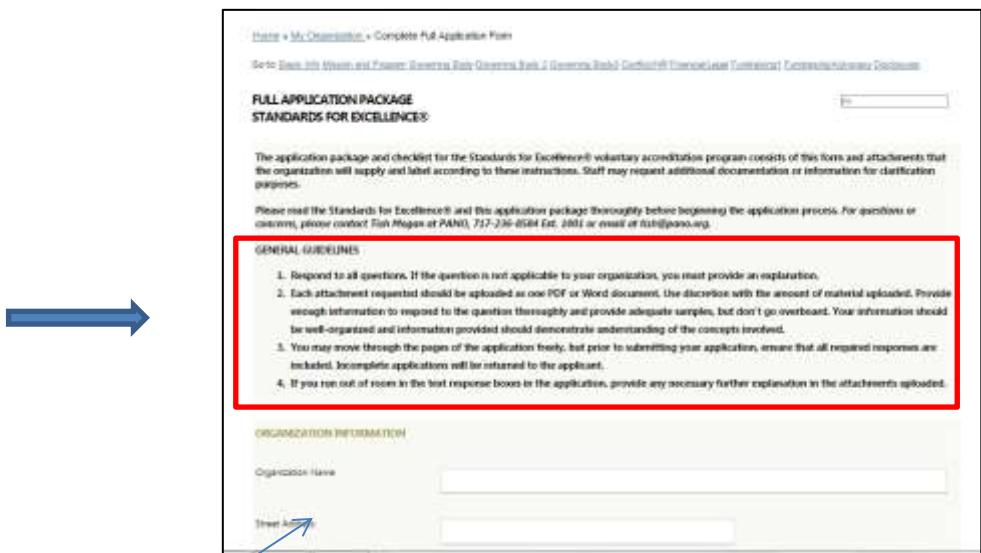


Figure 13 - Full Application Package Instructions screen

13. Begin by entering all requested information. At the bottom of each page you will see the command buttons: (See Figure 14)
 - a. **Save & Continue Editing** – Allows you to save information as well as edit any previously entered information on this screen. It will not advance to the next page.

- b. **Back** – Returns you to the previous page.
- c. **Next** – Advances you to the next page.
- d. **Submit** – Submits your completed application (*this button only appears on the last page of the application*)



Figure 14 - Command Buttons

As you move through the application package, your progress bar will display in the top right corner of the screen to let you know where you are in the process. (See Figure 15)



Figure 15 - Progress Bar

14. Once the Full Application Form has been completed, click on the submit button to submit the application form. You will be returned to your Dashboard page. (See Figure 16)



Figure 16 - Dashboard screen

15. Complete the next task to **Upload Certification Statement**:
 - a. Click on the [sign this statement](#) hyperlink to download the PDF file to be printed. The *Board Chair* and the Organization’s *Chief Staff Officer* should sign the document. Scan the signed Certification Statement and click on the [Upload Certification Statement](#) hyperlink to attach to your application.

16. Complete the final task to **Make a Payment**:

Instructions for Online Accreditation or Basics Application Process

- a. Click on the [Make a payment](#) hyperlink and select the appropriate payment method of your choice. This should allow you the option of paying by credit card online or asking for an invoice. You will also have the option to choose the yearly or full payment.
- b. If you are paying by credit card a box will appear that contains the number “1.” Please type the amount of your payment in that box. (See Figure 17)



Figure 17 - Submit Full Application screen

***Note: If you plan on choosing the invoice option your application will NOT be processed until payment is received. You will notice that the *Self-Assessment* and *Payment* tasks will be marked as **Incomplete**.**

Upon payment, PANO will submit the application, marking the *Payment* task complete. The *Self-Assessment* task is optional and does not need to be completed.

You will be notified by PANO when the application has been submitted.

17. Once all the tasks have been satisfactorily been completed, submit your application by clicking on the **Submit Full Application** button. (See Figure 18)

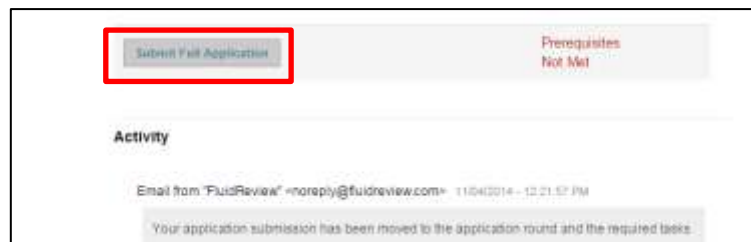


Figure 18 - Submit Full Application screen

Returning to the application

There may be times when you need to exit the application for a reason. Don't worry, your data will be saved. To get back to your application, follow the instructions below.

1. Sign in to your account as you normally would, using your username and password. Your Dashboard screen displays. (See Figure 19)

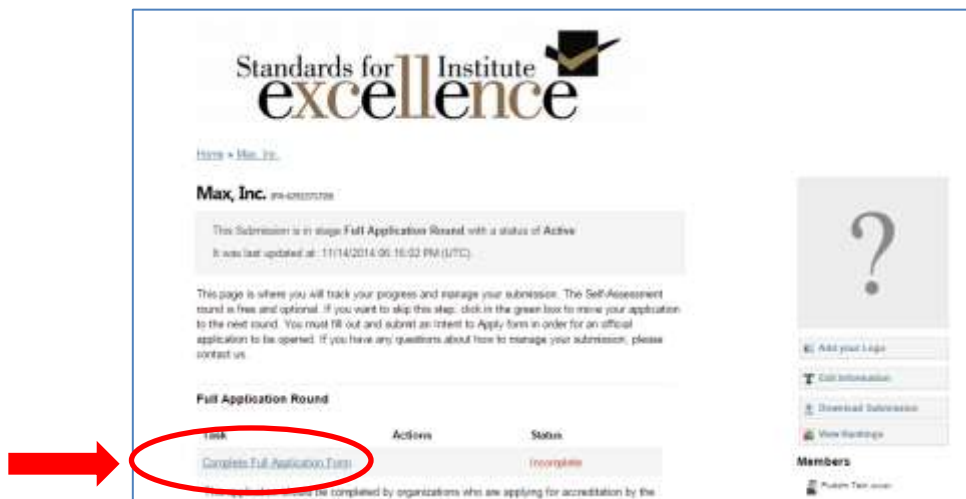


Figure 18 - Dashboard

2. Click on the [Complete Full Application Form](#) link to get back to your application. You will notice that some fields have been already filled out, and some documents have been previously uploaded.
3. Verify all necessary fields are completed.
4. At the bottom of your screen you will click on the **Next** button to advance to the next page in the application. (See Figure 20)

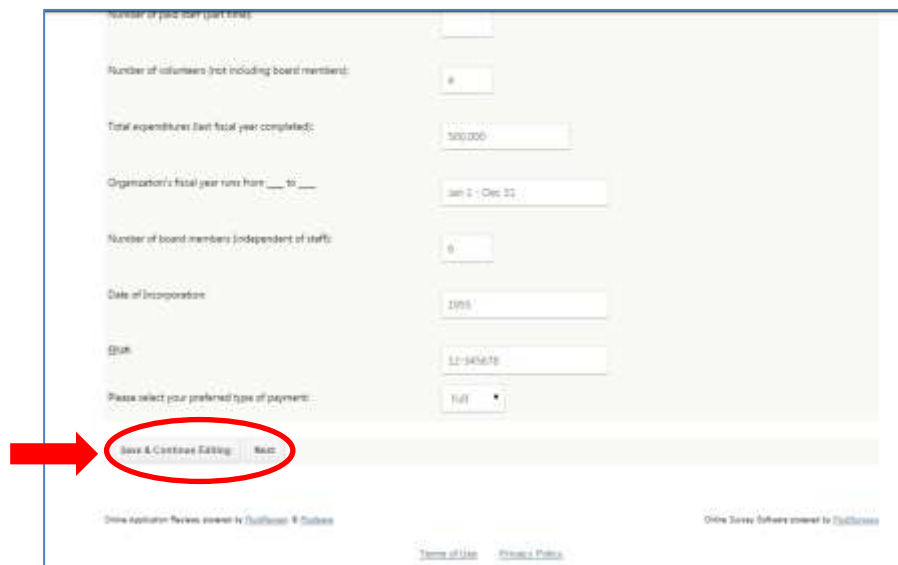


Figure 20 – Application

5. Continue with your application.

Downloading your application

Downloading your application from your Dashboard screen.

1. In order to have a copy of your complete application, you may download it. Ensure you are on your Dashboard screen. (See Figure 21)

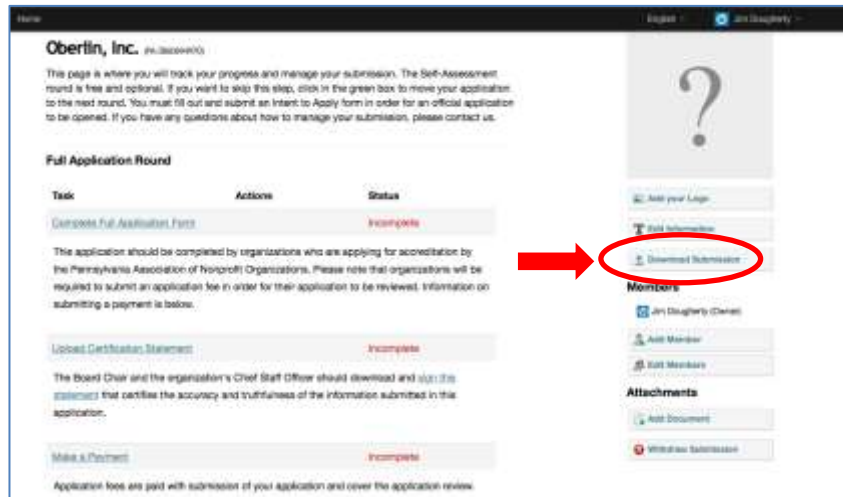


Figure 19 - Dashboard

2. Click on the [Download Submission](#) link to begin the download. Once the download has completed, you will receive the confirmation screen. (See Figure 22)

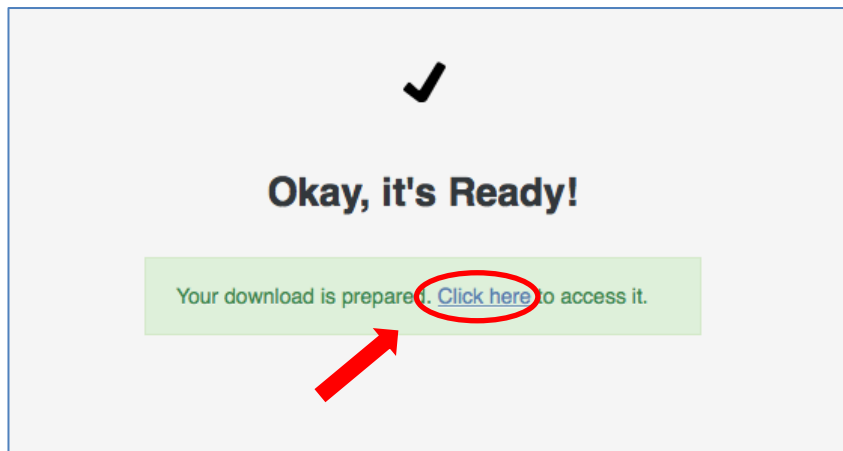


Figure 20 – Dashboard

3. Click on the [Click here](#) link to begin the download in PDF format.