



EDA Designation Handbook

Advice for Electronic Document Associate candidates

Appendices & forms

Created March 2010

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EDP Certification Program—Background

Electronic Document Professional (EDP) is an industry designation awarded to qualified individuals who have demonstrated broad knowledge of and experience in digital communication—whether in print, over internal networks, or online—from document creation to distribution.

Turning electronic documents—the heart of modern corporate communication—into effective communications is the work of professionals. EDP certification ensures that the recipient has demonstrated excellence by a thorough examination of his or her work, business ethics, and overall contributions to the industry through a rigorous evaluation process.

The EDP program allows individuals to differentiate themselves. Certification brings recognition, career enhancement, and personal satisfaction. Many EDPs are viewed as experts for effective and consistent communication throughout their organizations, sources of knowledge about new electronic document technologies, and leaders in effective information management within their organizations and the industry as a whole.

The EDP program has three levels:

- The *Electronic Document Associate (EDA)* designation (Electronic Document Associate) is awarded to individuals currently working in the electronic document industry, with a minimum of two years active work experience in the industry and an equivalent of 50 education credits. Education credits are earned through post-secondary education and industry-related education.
- The *Electronic Document Professional (EDP)* certification is awarded to individuals currently working in the electronic document industry, with a minimum of five years active work experience in the industry, who accept the EDP Code of Ethics, who earn an equivalent of 100 education credits, and submit a portfolio of actual business examples that demonstrate and document the candidate's capabilities.
- The *Master Electronic Document Professional (M-EDP)* designation is reserved for EDPs with significant business and life experience as an EDP.

The Electronic Document Professional Certification program is sponsored and maintained by Xplor International which is a professional association for the electronic document industry. Xplor International is a not-for-profit association incorporated in the State of Illinois (USA) with its headquarters in Land O' Lakes, Florida.

Xplor's mission is to provide organizations and individuals with:

- Education in the technologies, business processes, and legal responsibilities related to the creation, customization, production, and delivery of electronic and paper documents
- Networking opportunities to encourage information sharing and informal problem solving
- Forums in which technology users and suppliers can exchange ideas and solutions to promote best practices in the industry

Xplor International is managed by the Association Board of Directors (ABOD) which is elected by its members.

EDP certification has been designed for persons employed in the electronic document industry and is administered by the EDP Commissioners, all of whom have successfully completed EDP certification.

Membership in Xplor is not required for certification or recertification.

Eligibility for EDA designation is defined in the EDA APPLICATION FORM that includes a CODE OF ETHICS (see appendices) and is available on the website at www.xplor.org/edp.

Advice for candidates

1. EDA eligibility

To apply for EDA Certification, an individual must meet these minimum eligibility criteria:

- Currently employed in the Electronic Document Systems Industry
- Have a minimum of two years work experience in the industry
- Commit to continuous learning and keeping up to date in the industry by earning 50 education credits through professional courses, seminars, certifications, and in the classroom
- Accept the **EDA Code of Ethics**

The next step is to complete the Application for EDA Certification, and pay the USD \$150 application fee. Once the application has been reviewed by the EDP Registrar, you will receive notice of acceptance or a request for clarification should your application not meet minimum requirements. (Note: If your EDA application is successful and you apply for EDP Certification within five years of being awarded your EDA designation, the USD \$50 EDP application fee will be waived. You will still be responsible for the USD \$300 submission fee for the portfolio of work examples.)

Certificates are awarded throughout the year when applications are accepted.

- You will also be asked if you intend to continue forward in your certification process and prepare for the next level of Electronic Document Professional (EDP)
- If you already meet the minimum EDP requirements (5 years working experience and a total of 100 education credits), or believe you will meet these requirements within a year, you may immediately apply for the next level
- Your EDA designation is good for 5 years—you must either apply for EDP within 5 years or reapply for EDA designation by your 5th year anniversary

2. EDA education credits

Education credits required for EDA may be earned in the following ways:

- Higher education, college, or degree-earning studies: 10 credits per year
- Electronic document industry-related courses with examination or accredited courses: 10 credits per Continuing Education Unit (CEU) or passing grade
- Attendance in the past 5 years at conferences, courses, seminars, and certificate programs sponsored by educational institutions, professional trade associations, vendors, government agencies, consulting firms, and other relevant seminars. All must be directly related to the electronic document industry to qualify for credits.

Each activity must be a least one day, have a professional content and instructor/presenter: 5 credits per day

- Attendance in the past 5 years at online webinars sponsored by educational institutions, professional trade associations, vendors, government agencies, consulting firms, and other relevant webinars. All must be directly related to the electronic document industry to qualify for credits. Each activity must be at least one hour, have a professional content, and instructor/presenter: 1 credit per hour; up to a maximum of 5 credits per day

3. EDA resources

Resources provided in this handbook include answers to *frequently asked questions* and other resources as found at www.xplor.org/edp.

4. Mentors

Probably the best advice offered to any candidate is to have a mentor assigned to help you with the whole process.

Anyone can help an EDA candidate with various aspects of their submission but clearly someone who is already an EDP, or even a Commissioner or past Commissioner, will have very relevant advice to pass on.

To obtain a mentor, candidates should contact Xplor International, EDP Administrator at +1-813-929-8100 to request a current list of available people. Good practice would be to locate mentors you know, have heard of, or who are geographically close. Xplor will assist in recommending mentors as necessary, and contact a mentor on behalf of candidates.

Creating a working relationship with the mentor becomes the candidate's responsibility.

5. Frequently asked questions

- *Should I apply for EDA or EDP?*

If you believe you meet the qualifications for EDP certification, then by all means apply for your EDP certification.

If not, then consider the EDA designation. The EDA designation is an entry point into the EDP Certification program. Once you apply and are confirmed as an EDA, you will have the resources of the EDP Certification program available to help you on your journey towards certification as an EDP.

- *How much is the EDA application fee?*

It is \$150 (US). As long as you apply for EDP certification within a five year period of obtaining your EDA designation, the EDP application fee of USD \$50 is waived.

- *When will I find out whether my EDA application has been accepted or not?*

You may submit an EDA application and application fee at any time throughout a given year. Usually, you are notified of the outcome within 10 business days of application submission. The timing may fluctuate based on the EDP Registrar availability.

- *What are the fees associated with the program used for?*

Fees help cover the costs of program administration, the development of program materials, and EDP recognition. A great deal of administrative work is also accomplished by volunteers such as Commissioners and mentors who assist to promote the long-term good of the industry.

- *What are the benefits of an EDA designation?*

The EDP Certification program allows individuals to differentiate themselves. Certification brings recognition, financial opportunities, and personal satisfaction. In fact, according to an independent survey of program participants, the most common benefits include peer and employer recognition, improved opportunities for raises and promotions, and a sense of personal accomplishment.

- *Do fees have to be paid in US dollars?*

Yes, Xplor International requires payment in US dollars. If you are unable to pay in US dollars, please contact Xplor International, EDP Administrator at +1 813 929 8100.

- *How do I choose a mentor?*

Contact your local Chapter or Region, other EDPs, or Xplor International, EDP Administrator at +1 813 929 8100 to request a mentor. If there is any problem with the mentor chosen, you can select a different mentor at any time.

APPENDICES

A.1 EDA Code of Ethics and declaration

This code of ethics is acknowledged and signed in the original application form. It is repeated at the start of the candidate's portfolio along with the candidate's declaration and signature.

Code of Ethics

As an Electronic Document Associate, I will strive to maintain and improve the standards of the profession and encourage the spread of knowledge relating to the development of the industry.

I acknowledge that I have an obligation to society. Therefore, I will actively cooperate with other Electronic Document Associates to promote the understanding of the key role of electronic document systems in business and its power to help people communicate.

I recognize that as part of a worldwide fellowship I shall be loyal to my fellow Electronic Document Associates, and be willing to share my experience and participate in ways to advance the technology and our profession. I will not use confidential information pertaining to the business of a fellow Electronic Document Associate to advance my own interests.

As an Electronic Document Associate, I recognize the need for an open relationship among customers and suppliers. I shall, therefore, endeavour to be honest and fair in my commercial relationships.

I have an obligation to use electronic document systems in ways that will best meet my employer's mission and encourage other associates within the organization towards the same goals.

I acknowledge that this Code of Ethics is an integral part of the rights and responsibilities conferred upon me as an Electronic Document Associate.

Candidate's declaration

I certify that the information supplied here is true and correct. I understand that any knowingly false statement herein is grounds for this application to be rejected or the EDP designation, if granted, to be revoked.

By signing this document, you grant Xplor International the right to use your name and/or company name to promote your success in the Electronic Document Certification program. Your contact details will not be released to any third parties without prior consent.

Check the appropriate box for agreement: Yes, you can use my name: company name: both:

Signature Date

A.2 EDA fees

Note that any applications will not be evaluated without timely and appropriate payment of fees.

The EDP Commission at their first meeting of each year shall review program fees. Proposed revisions and effective dates must be presented to and approved by the Association Board of Directors.

All fees shall be used for program administration and are not refundable.

Xplor International requires payment in US dollars. Payment can be made with a US bank check in USD (made out to Xplor International), or with an American Express, MasterCard, or Visa credit card. If you are unable to pay in US dollars or by one of the methods, please contact Xplor International, EDP Administrator at +1 813 929 8100.

Current program fees shall be published on Xplor International's website, www.xplor.org/edp.

- **EDA Designation fees**

USD \$150 Application for EDA designation

- **EDP Certification fees**

USD \$50 Application for EDP certification. The application fee is waived for a current EDA if they apply within five years of receiving their EDA designation.

USD \$300 Submission of the portfolio of work examples

Note: the same fees are applicable to Xplor and non-Xplor members.

- **EDP Recertification fees**

USD \$25 Paid yearly or USD \$125 during the five year recertification period

The EDP Commission agreed to these fees in February 2010.



Electronic Document Associate Application

Information about this form

This form is designed to establish your eligibility to apply for acceptance as an Electronic Document Associate (EDA) in the Electronic Document Professional (EDP) Certification Program. The EDA designation is an entry point into the EDP Certification Program. Once you apply and are confirmed as an EDA, you will have the resources of the EDP Certification Program available to help you on your journey towards certification as an EDP. Please take a minute to read through the application before starting to complete the sections.

The requirements are simple:

- You need to be currently working in the Electronic Document Industry, have a minimum of 2 years active work experience in the industry, and have earned an equivalent of 50 education credits. Education credits are earned through post-secondary education, certified continuing education classes related to the Electronic Document Industry and attending industry related events.

Complete the sections that ask for information about you and your work in the Electronic Document Industry as well as education credits. Then sign the Declaration and give us information on how you are making your payment. If you need to use additional pages to note additional educational courses, etc., then please indicate clearly on these pages your name and the sections to which the information relates.

Finally, we recommend that you make a **copy** of everything and send the original application form and any additional notes along with copies of your supporting information to Xplor Headquarters. We will let you know if your application is successful.

Good luck, and if you have any questions, please call us at: +1-800-669-7567 or +1-813-929-8100 outside the USA.

Information about you

Name (First, Middle Initial, Last):
Address, City, State or Province, Zip
or Postal Code, Country:
Phone:

Email Address:

- I am currently employed in the field of electronic documents.
- I have worked in the field of electronic document systems or in a related field for _____ years, from _____ to _____.
- An EDP referred me to the Electronic Document Associate (EDA) application as part of the Electronic Document Professional (EDP) Certification Program. His/her name is _____

Note: The EDP may earn knowledge sharing credits towards his or her recertification by referring you to the EDP Certification Program.

Your work in the industry – You need 2 years

Please describe your employment starting with your current position

Company Name

Your Position or Title

Company Address

Contact Name, Contact Phone and/or Email Address

of Years , **From (Year)** **To (Year)**



Electronic Document Associate Application

Please describe your previous employment

Company Name		Your Position or Title	
Company Address		Contact Name, Contact Phone and/or Email Address	
# of Years	, From (Year)	To (Year)	Your Position or Title
Company Name		Contact Name, Contact Phone and/or Email Address	
# of Years	, From (Year)	To (Year)	

Your education credits – You need 50

Please describe your higher education, college or degree earning studies – 10 credits per year

Organization		Course	
# of Years	, From (Year)	To (Year)	Course
Organization			
# of Years	, From (Year)	To (Year)	Course
Organization			
# of Years	, From (Year)	To (Year)	

Please describe your electronic document industry-related courses with examination or accredited courses – 10 credits per Continuing Education Unit (CEU) or Passing Grade

Organization		Course	
Year Course Taken	# of Course Days	# of CEUs Earned or Grade	Course
Organization			
Year Course Taken	# of Course Days	# of CEUs Earned or Grade	Course
Organization			
Year Course Taken	# of Course Days	# of CEUs Earned or Grade	Course
Organization			
Year Course Taken	# of Course Days	# of CEUs Earned or Grade	Course
Organization			
Year Course Taken	# of Course Days	# of CEUs Earned or Grade	



Electronic Document Associate Application

Please describe your attendance, in the past 5 years, at conferences, courses, seminars, and certificate programs sponsored by educational institutions, professional trade associations, vendors, government agencies, consulting firms and other relevant seminars. All must be directly related to the electronic document industry to qualify for credits. Each activity must be a least one day, have a professional content and instructor/presenter – 5 credits per day

Organization *Course*

Year Attended *# of Days*
Organization *Course*

Year Attended *# of Days*
Organization *Course*

Year Attended *# of Days*
Organization *Course*

Year Attended *# of Days*
Organization *Course*

Year Attended *# of Days*
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Organization *Course*

Year Attended *# of Days*
Organization *Course*

Year Attended *# of Days*



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<i>Organization</i>		<i>Webinar Name</i>
<i>Date Attended</i>	<i># of Hours</i>	<i>Webinar Name</i>
<i>Organization</i>		
<i>Date Attended</i>	<i># of Hours</i>	<i>Webinar Name</i>
<i>Organization</i>		
<i>Date Attended</i>	<i># of Hours</i>	<i>Webinar Name</i>
<i>Organization</i>		
<i>Date Attended</i>	<i># of Hours</i>	<i>Webinar Name</i>
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<i>Date Attended</i>	<i># of Hours</i>	<i>Webinar Name</i>
<i>Organization</i>		
<i>Date Attended</i>	<i># of Hours</i>	<i>Webinar Name</i>
<i>Organization</i>		
<i>Date Attended</i>	<i># of Hours</i>	<i>Webinar Name</i>
<i>Organization</i>		



Electronic Document Associate Application

Code of Ethics for Electronic Document Associates

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Declaration

I certify that the information supplied here is true and correct. I understand that any knowingly false statement herein is grounds for this application to be rejected or the EDA designation, if granted, to be revoked.

By signing this document, you grant Xplor International the right to use your name and/or company name to promote your success in the Electronic Document Certification program. Your contact details will not be released to any third parties without prior consent.

Check the appropriate box for agreement: Yes, you can use my name: company name: both:

Signature

Date



Electronic Document Associate Application

Information about your payment

The US \$150 application fee is non-refundable and is required for the EDP Registrar to determine your eligibility for the EDA designation. If your EDA application is successful and you apply for EDP Certification within five years of being awarded your EDA designation, the USD \$50 EDP application fee will be waived. You will still be responsible for the USD \$300 submission fee for the work examples. You can pay by a US bank check in US dollars or by one of the credit cards listed below.

Check VISA MasterCard American Express

Make Checks Payable to:

Xplor International

Mail Checks to:

Xplor International, 4022 Land O'Lakes Blvd., Suite 102,
Land O'Lakes, FL 34639 USA

Credit Card Number:

Expiration Date:

Security Code:

Address where credit card statement is received:

Thank you for applying to the EDP Certification Program for an EDA designation. Please remember to provide supporting documentation, such as copies of course certificates, certification awards, diplomas, or conference registration documents or attendance badges. If you needed additional space when filling out the sections, then please remember to attach the additional sheets.

If you want more information on the certification program, its requirements and the timeline, please go to www.xplor.org/edp.

Please complete this form and return it with copies of all your supporting information and your application fee to:

Xplor International
4022 Land O'Lakes Boulevard
Suite 102
Land O' Lakes, FL 34639
USA
