National Board Certification Partner Portal User Guide: Account Creation

Version 1.0

NATIONAL BOARD

for Professional Teaching Standards®

Contents

Introduction

About the Partner Portal

The Partner Portal is an online system designed to efficiently support National Board partners. "Partners" are defined as non-candidates—including but not limited to Third-Party Payers (TPPs), Candidate Support Providers (CSPs), network users, and state agencies—who partner with the National Board to support candidates.

With the Partner Portal, partners—depending on their permissions—can do the following:

- access candidate information and certification progress (based on state, district, school, and information release questions)
- manage TPP funding with self-service options for
  - submitting purchase orders and tracking status
  - applying funds to candidate accounts
  - making changes to candidate funding
- access real-time financial reports

About this Guide

This guide explains the following processes:

- creating a user account in the Partner Portal
- designating different levels of users
  - Primary Contact: a user within an organization who is responsible for determining how information regarding National Board Certified Teachers and candidates for National Board certification will be used, shared, and protected within the organization; an organization can have only one Primary Contact
  - Secondary Contact: a user who is designated and authorized by the Primary Contact to use the Partner Portal; an organization can have multiple Secondary Contacts
- resetting a forgotten password

Create an Account

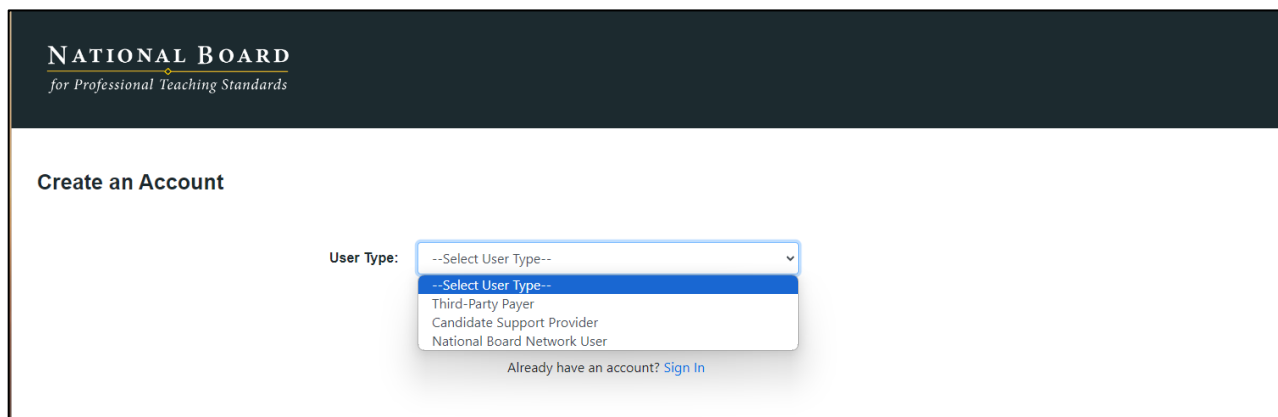Visit the [Partner Portal Sign In page](#) and click the "Click here to Sign Up" button.

Sign In page

1. Select User Type

On the next screen, select the appropriate user type from the drop-down menu:

- **Third-Party Payer —** Select this user type if you are a [Third-Party Payer](#) and provide monetary support to candidates undergoing the certification process via the National Board.
  - If you select "Third-Party Payer," click the button for the appropriate contact type:
    - Third-Party Payer Primary Contact: An account form will display for you to start account creation (see steps below).
    - Third-Party Payer Secondary Contact:
      - If you have not been approved to become a Secondary Contact, a notice will display to contact the Primary Contact of your Third-Party Payer Account in order to create a Secondary Contact account.
      - If you have been approved to become a Secondary Contact, an account form will display for you to start account creation (see steps below).
- **Candidate Support Provider —** Select this user type if you lead or facilitate a program designed to support educators through their Board certification journey.
- **National Board Network User —** Select this user type if you are the administrator of a [National Board Network](#).

If there is an issue with the user-type selection during account creation, you will receive within 7 business days a follow-up email from the unmonitored sender "No-Reply@NBPTS.org" to restart the process.

Expanded user type drop down menu

2. Complete Account Form

Complete the account form for the user type you selected (the sample below is of a Third-Party Payer form) and click "Sign Up." Your request will be submitted for review by the administrator.

TPP Primary Contact Account sample form

3. Sign User Agreement

Completing the user agreement varies by user type:

- If you are a Primary Contact user, check your inbox within 7 business days for an email from the unmonitored sender "No-Reply@NBPTS.org" for next steps. (If the email is not in your inbox, check your spam folder.)

  In this email, you will be directed to the Accept User Agreement form. Complete the form and click the "Click Here to View and Accept User Agreement" button.

- If you are a Candidate Support Provider or National Board Network Administrator, the "Click Here to View and Accept User Agreement" button will be at the bottom of your account form.

As an option, check "Enable Two-Factor Authentication (2FA)" to add an extra layer of security to your account that would automatically send a verification code to your registered email for you to enter when signing in with your username and password.

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Accept User Agreement for Third-Party Payer Primary Contact

Title *   **First name** *   **Last name** *

Ms. ▾   Firstname   Lastname

Organization Address *

1 Sample Street

Country *   **State** *

USA   MA ▾

City *

Sample Town

Job Title *

Manager

Email *

███████████

Phone *

+1 555-555-5555

☐ **Enable Two Factor Authentication(2FA)** **(Click here to learn more about Two Factor Authentication (2FA))**

Click Here to View and Accept User Agreement

☐ **User Agreement Status**

Submit

Back to Sign In?

User agreement sample form for TPP Primary Contact

In the popup window, read the Partner Portal Terms of Use, scrolling to the bottom of the screen. Once at the bottom of the screen, enter your digital signature by typing your name and click "Accept." Be sure the first and last names of the signature provided match the first and last names of the user. Clicking "Accept" will return you to the user agreement form. Once there, click "Submit."

- Note: The user agreement is only valid until May 15th of each year. You will receive an email from the unmonitored sender "No-Reply@NBPTS.org" 30 days prior to expiration to renew; if you do not re-sign, your access will be revoked, and you will be locked out of the Partner Portal.

Terms of Use popup with signature entered

4. Reset Password and Sign In to the Portal

Check your inbox within 7 business days for an email from the unmonitored sender "No-Reply@NBPTS.org" for next steps. This email will include a link to change your password. Once you change your password, you will then be directed to the Partner Portal Sign In page.
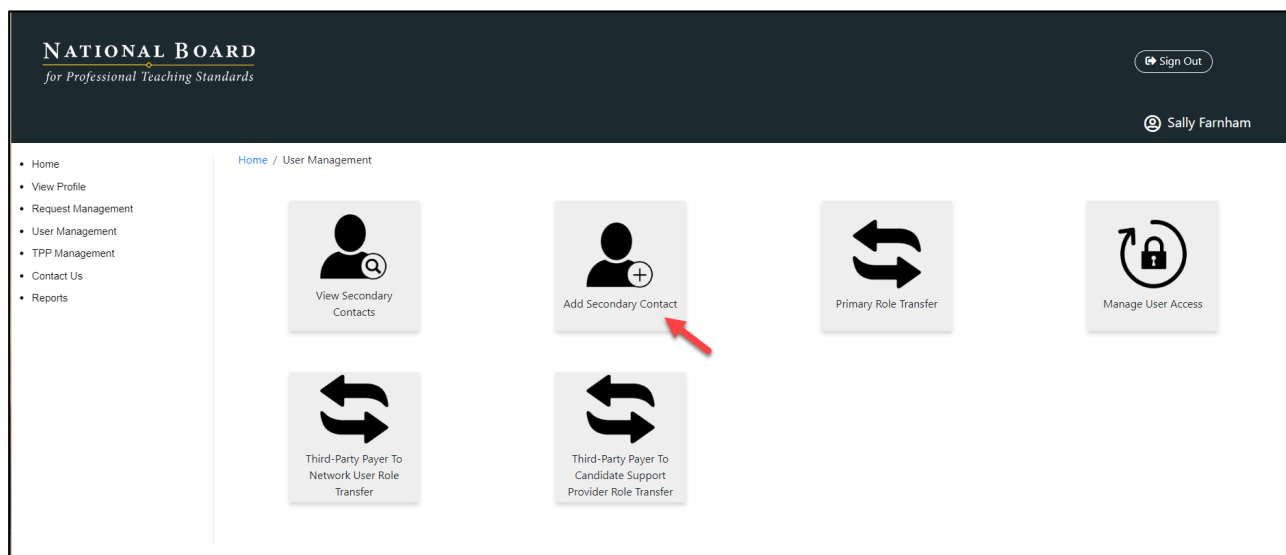
Primary Contact Functions

If you are a Primary Contact, the following functions related to account creation are available to you in the Partner Portal:

- [Add Secondary Contact(s)](#)
- [View and change permissions for Secondary Contacts](#)
- [Transfer Primary Contact role to different user](#)

Add Secondary Contact(s)

From the "User Management" screen, click "Add Secondary Contact."

Add Secondary Contact function on User Management screen

Complete the Add a Secondary Contact form (the sample below is of a Third-Party Payer form), and click the "Add Secondary Contact" button.

Add a Secondary Contact sample form

Check your inbox within 7 business days for an email from the unmonitored sender "No-Reply@NBPTS.org" that the Secondary Contact is either approved or rejected. If approved, the Secondary Contact will receive an email to set up their account; if rejected, they will receive an email for the next steps to follow.

View and Change Permissions for Secondary Contacts

From the "User Management" screen, click "Manage User Access."
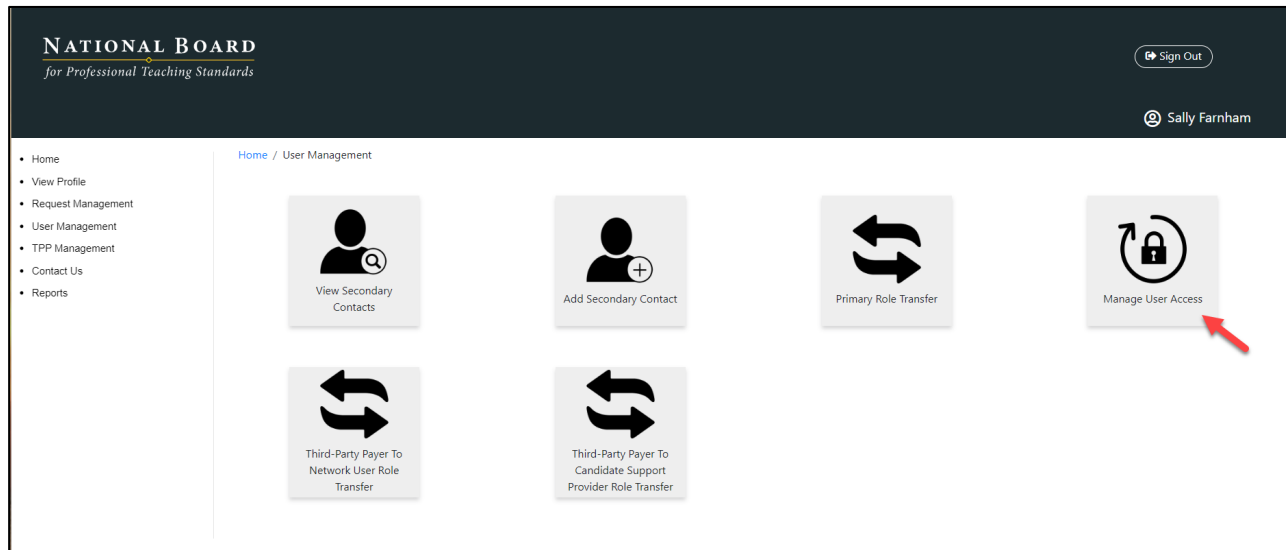
Manage User Access function on User Management screen

In the table of users on the next screen, the "Action" column for each user has a "Manage Access" button. Click the button for the user for whom you would like to view or change permissions.
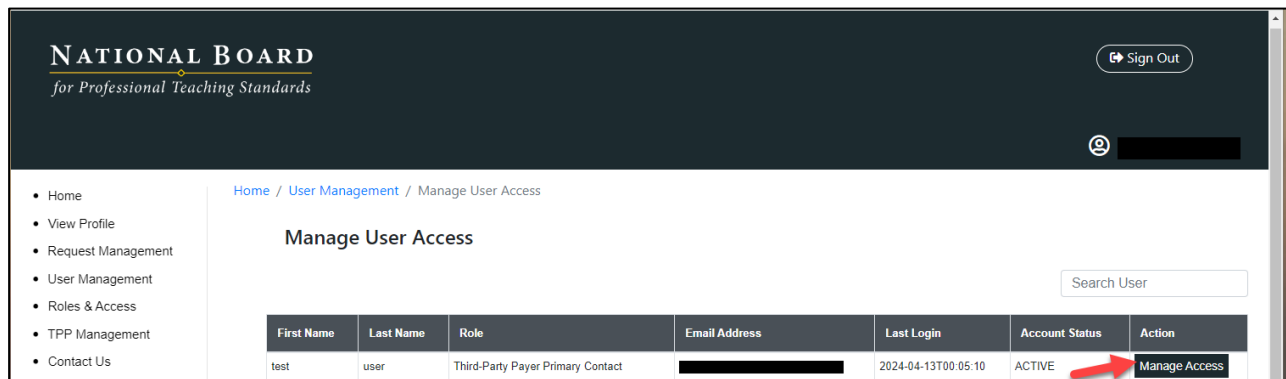
Manage Access button in Manage User Access table of users

Toggle on the "Enable User Specific Access" button.
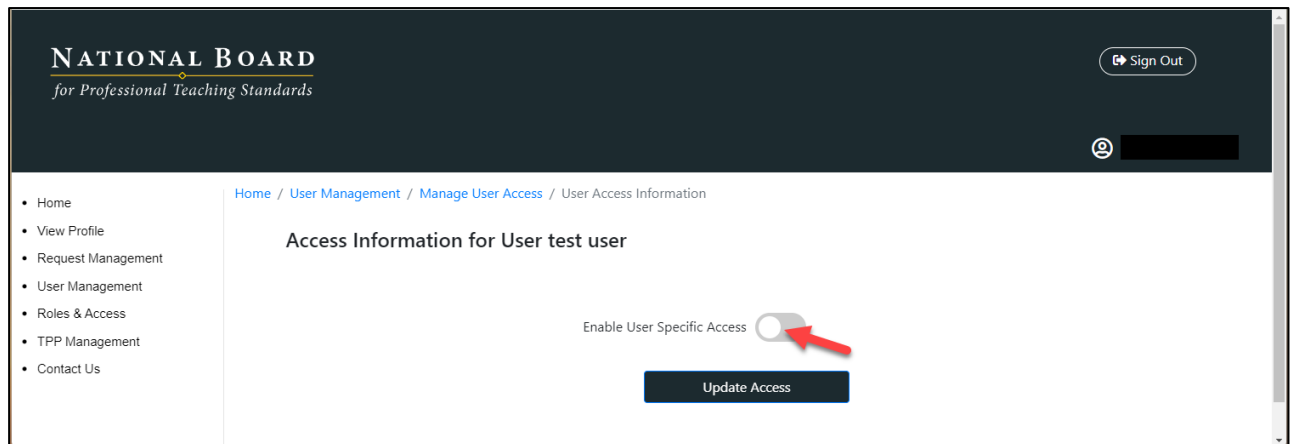
Toggle button to enable user specific access

This will bring you to the Access Information for User screen where you can edit permissions, depending on the user (a TPP, a CSP, or a network administrator). Click the "Update Access" button when you have changed the necessary permissions.


Access Information for User screen

# Transfer Primary Contact Role to Different User

If you would like to transfer the role of Primary Contact from yourself to a different user, that user must first be set up as a Secondary Contact account (see "Add Secondary Contact(s)" above).

Once that user is a Secondary Contact, from the "User Management" screen, click "Primary Role Transfer."
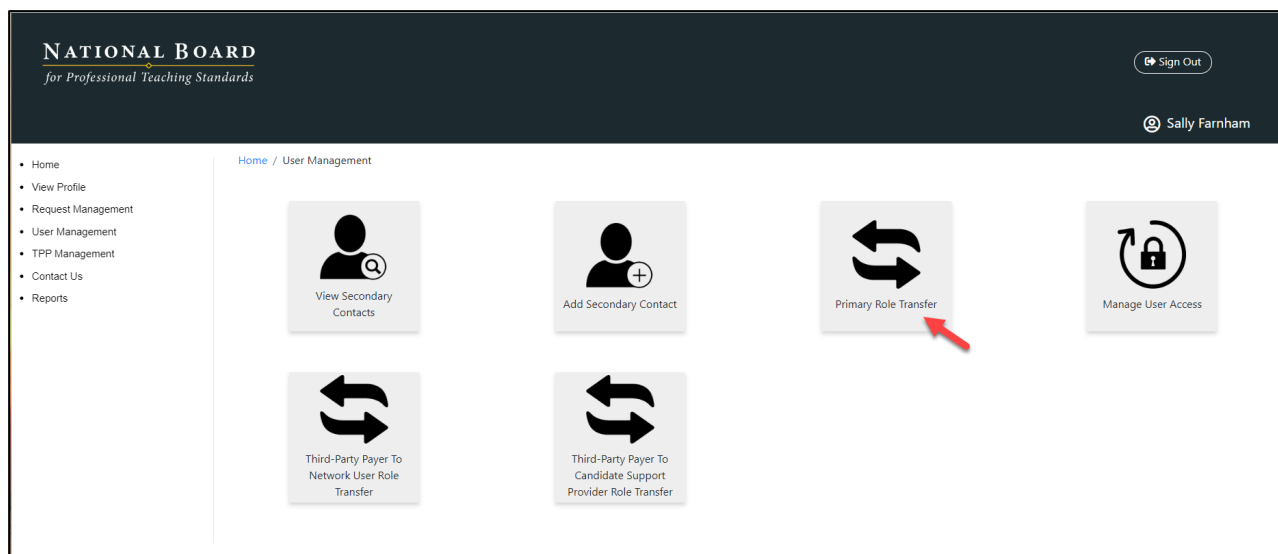
Primary Role Transfer function on User Management screen

On the Primary Role Transfer screen, click "Make Primary" in the Action column for the user you want to make a Primary Contact. Check your inbox within 7 business days for an email from the unmonitored sender "No-Reply@NBPTS.org" that will notify you that the Secondary Contact is now the Primary Contact and that you are now a Secondary Contact.
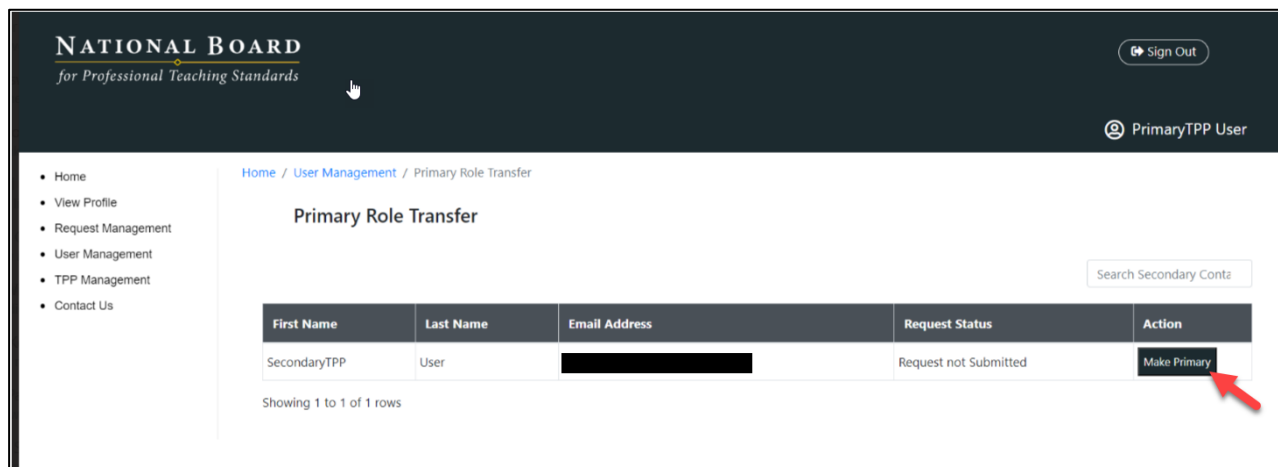
Make Primary button on Primary Role Transfer screen

Reset Password

If you forget the password to your Partner Portal user account or would like to change your password, click the "Forgot your password?" link on the Sign In page. Then check your inbox for an email from the unmonitored sender "No-Reply@NBPTS.org" with a one-time (expiring) token to reset your password.

Contact Us

For questions regarding account creation, contact us at 877-370-1524, Monday–Friday, 8 am–5 pm, CST, or by using our [Partner Portal web form](#).

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by

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