

# National Board Certification Partner Portal User Guide: Account Creation

Version 1.0

**NATIONAL BOARD**  
  
*for Professional Teaching Standards®*

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## 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**

**Email**  
✉ Enter your email

**Password**  
🔒 Enter your password

**Sign In**

[Forgot your password?](#)

Having trouble logging in? Please call us at 877-370-1524 or submit your question using this [form](#).

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**Welcome to the  
Partner Portal**

Don't have an account?  
[Click Here to Sign Up](#)

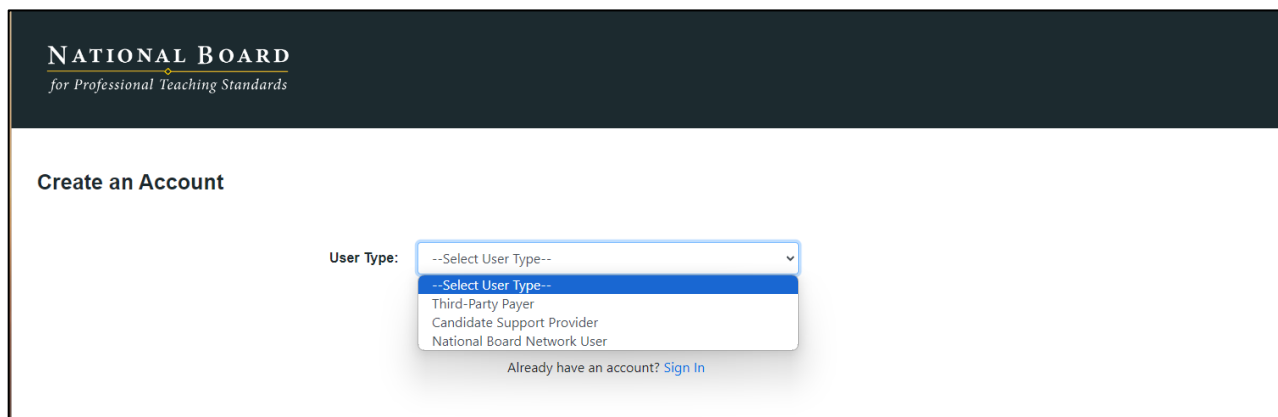
*Sign In page*

## 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.



The screenshot shows the 'Create an Account' page of the National Board for Professional Teaching Standards. The 'User Type' dropdown menu is expanded, displaying three options: 'Third-Party Payer', 'Candidate Support Provider', and 'National Board Network User'. Below the dropdown, there is a link that says 'Already have an account? Sign In'.

*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.

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### Create Third-Party Payer Primary Contact Account

User Type:

Third-Party Payer

☒ Third-Party Payer Primary Contact

☐ Third-Party Payer Secondary Contact

First name \*

First

Last name \*

Last

Email \*

sample@email.com

Phone \*

+1 555-555-5555

Ext

Enter extension

Third-Party Payer Name \*

Sample Name

State \*

MD

City

Sample Town

Sign Up

Already have an account? [Sign In](#)

*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.

## Accept User Agreement for Third-Party Payer Primary Contact

<b>Title *</b>	<b>First name *</b>	<b>Last name *</b>
<input type="text" value="Ms."/> ▾	<input type="text" value="Firstname"/>	<input type="text" value="Lastname"/>

**Organization Address \***

<b>Country *</b>	<b>State *</b>
<input type="text" value="USA"/>	<input type="text" value="MA"/> ▾

**City \***

**Job Title \***

**Email \***

**Phone \***

☐ **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?](#)



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 15<sup>th</sup> 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.

Accept User Agreement for Third Party Buyer Primary Contact

NATIONAL BOARD FOR PROFESSIONAL TEACHING STANDARDS, INC.  
Partner Portal Terms of Use

responsible relating to or arising under these Terms, including, without limitation, unauthorized access to or use or disclosure of Data.

8. Indemnification : Organization agrees to indemnify and hold harmless the National Board, its affiliates, officers, directors, employees, agents, and licensors from and against any and all claims, liabilities, damages, losses, costs, expenses, or fees (including reasonable attorneys' fees) that such parties may incur as a result of or arising from any Breach of this Agreement or other misuse of the Data for which Organization or its Users are responsible. This indemnification obligation will survive the termination of this Agreement.

9. No Assignment. Organization and its Authorized Users may not assign, subcontract, or sublicense these Terms or any rights or obligations hereunder, whether by operation of law or otherwise, without the prior written consent by the National Board. Any attempted assignment or other transfer in violation of the foregoing shall be void and of no force or effect. These Terms shall be fully binding upon, inure to the benefit of, and be enforceable by the parties and their permitted successors and assigns.

10. Severability. Should any provision of these Terms be held to be void, invalid, or unenforceable, such provision shall be enforced to the maximum extent permissible, and the remaining provisions of these Terms shall remain in full force and effect.

11. Entire Agreement. These Terms set forth the entire agreement between the parties regarding the Organization's and its Authorized User's access to and use and disclosure of Data, and supersedes any and all prior written or oral negotiations, understandings, and any other agreements between the parties. Any amendment or modification of these Terms must be in a writing signed by both parties. Unless otherwise specified, all writings required by these Terms (e.g., the terms "written" or "in writing") shall include email.

By clicking 'Accept' you are agreeing to our terms and conditions.

Job Title \*

Manager

*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.

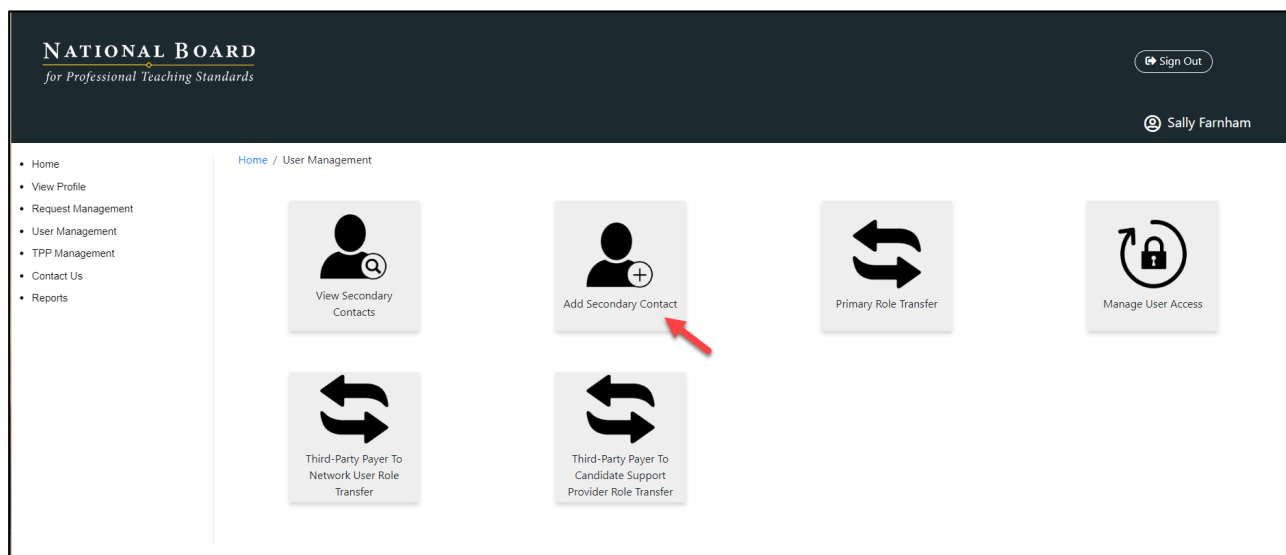
## Primary Contact Functions

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.

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Sign Out

Home / User Management / Add Secondary Contact

### Add a Third-Party Payer Secondary Contact

**First name \***  **Last name \***

**Email \***

**Phone \***

**Ext**

**Third-Party Payer \***

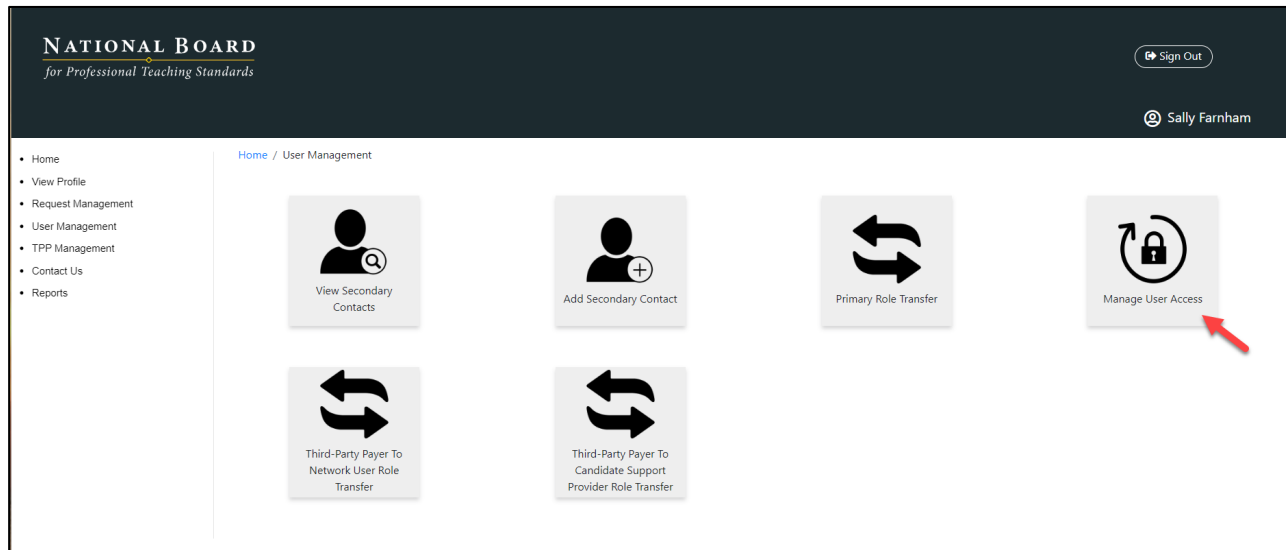
**Add Secondary Contact**

#### *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.

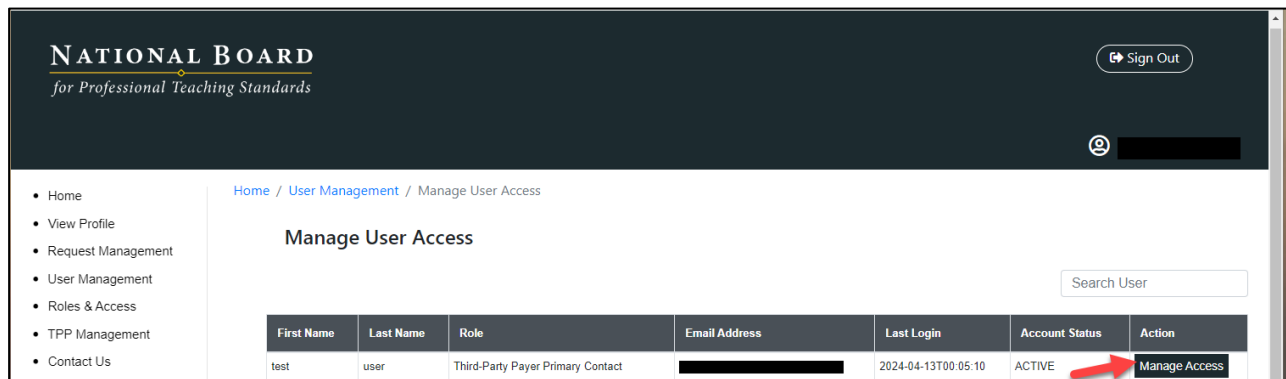
## View and Change Permissions for Secondary Contacts

From the “User Management” screen, click “Manage User Access.”



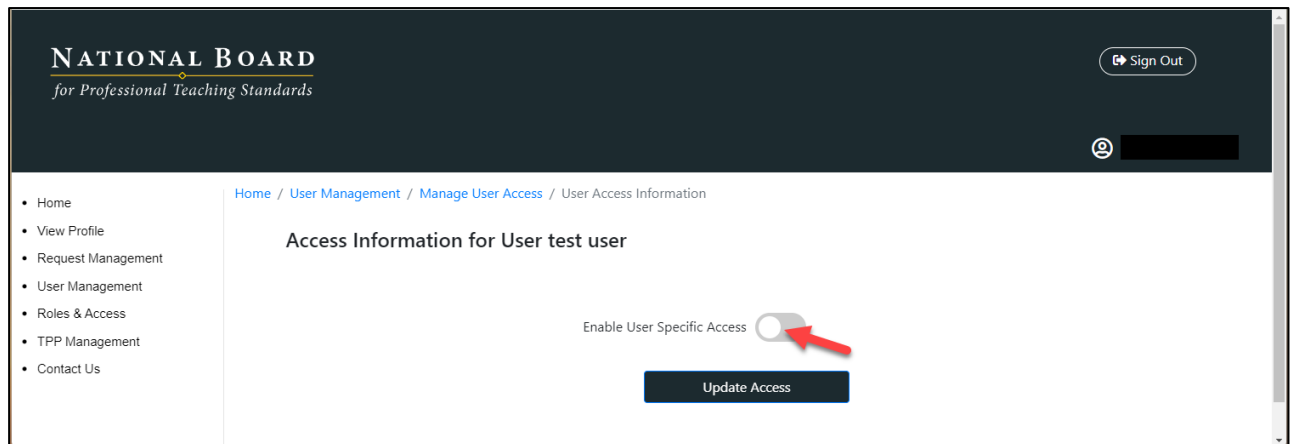
*Manage User Access function on User Management screen*

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.

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Sign Out

Home

User Management

Manage User Access

User Access Information

Access Information for User test user

Enable User Specific Access

Permissions	Allow Access
View Profile	<input checked="" type="checkbox"/>
Manage Profile	<input checked="" type="checkbox"/>
View User Agreement	<input checked="" type="checkbox"/>
Renew Agreement	<input checked="" type="checkbox"/>
Request Management	<input checked="" type="checkbox"/>
Manage Requests	<input checked="" type="checkbox"/>
User Management	<input checked="" type="checkbox"/>
View Secondary Contacts	<input checked="" type="checkbox"/>
Add Secondary Contact	<input checked="" type="checkbox"/>
Primary Role Transfer	<input checked="" type="checkbox"/>
View Users	<input type="checkbox"/>
Revoke Users	<input type="checkbox"/>
Suspend User	<input type="checkbox"/>
Manage User Access	<input checked="" type="checkbox"/>
Add New User	<input type="checkbox"/>
Reset User Agreement End Time	<input type="checkbox"/>
Third-Party Payer To Network User Role Transfer	<input checked="" type="checkbox"/>
Network User To Third-Party Payer Role Transfer	<input type="checkbox"/>
Third-Party Payer To Candidate Service Provider Role Transfer	<input checked="" type="checkbox"/>
Candidate Service Provider To Third-Party Payer Role Transfer	<input type="checkbox"/>
Incognito Login	<input type="checkbox"/>
Roles & Access	<input type="checkbox"/>
Manage Role Access	<input type="checkbox"/>
Manage Roles	<input type="checkbox"/>
TPP Management	<input checked="" type="checkbox"/>
Add New TPP	<input checked="" type="checkbox"/>
Remove TPP	<input checked="" type="checkbox"/>
View TPP Details	<input checked="" type="checkbox"/>
Deactivate TPP	<input type="checkbox"/>
Contact Us	<input checked="" type="checkbox"/>

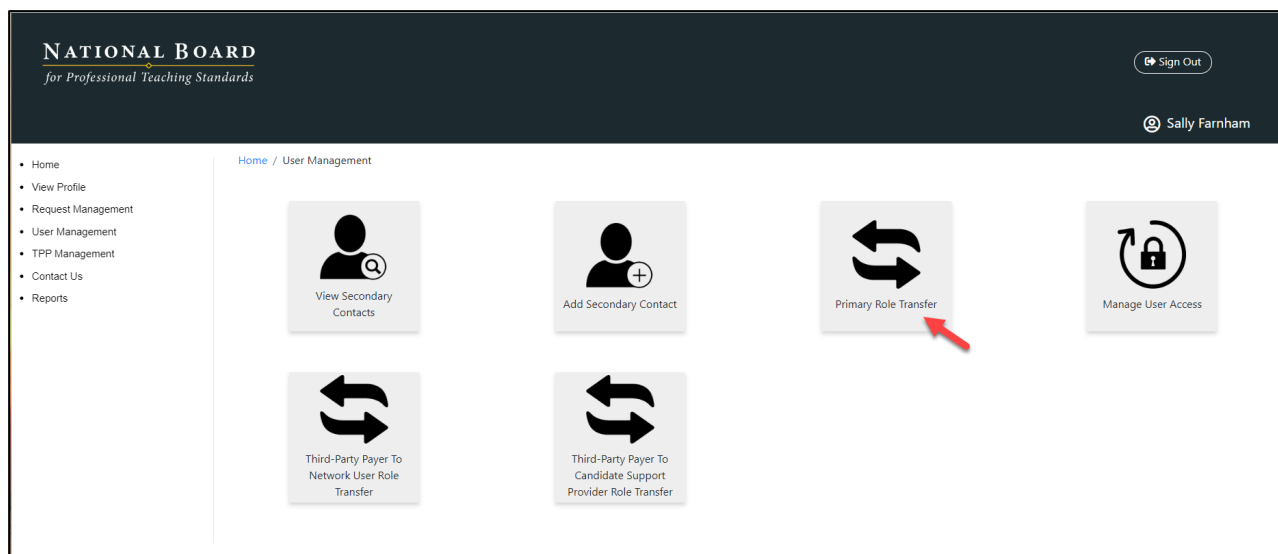
Update Access

*Access Information for User screen*

## Transfer Primary Contact Role to Different User

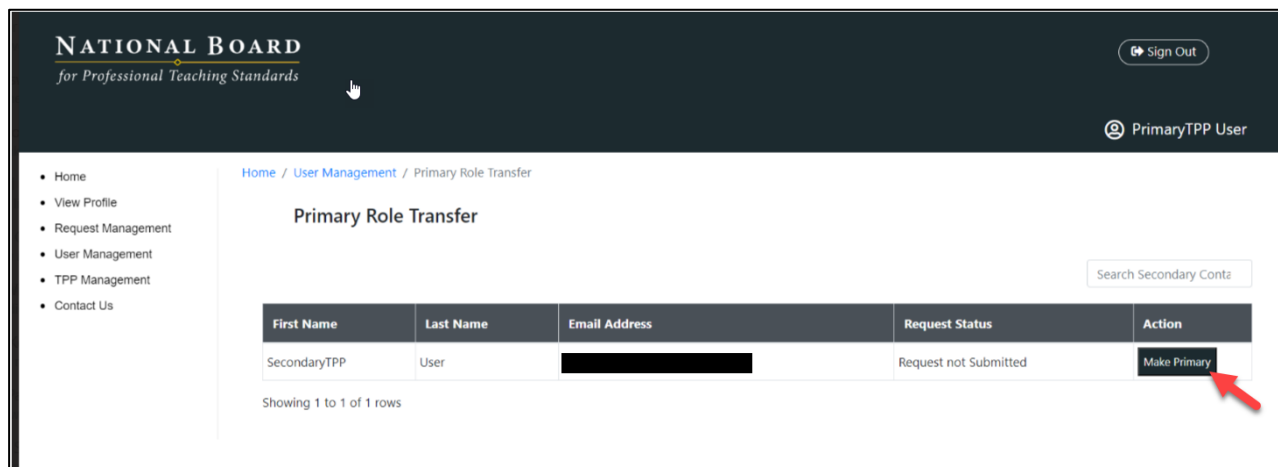
If you would like to transfer the role of Primary Contact from yourself to a different user, that user must first be set up as a Secondary Contact account (see “[Add Secondary Contact\(s\)](#)” above).

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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