Heuristic
S O L U T I O N S
INFORMATION STRATEGIES

NBSTSA
Exam Offering Process
School User Guide

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CHANGE LOG

Date	Action	Explanation
1/15/2023	Created document	
3/16/2023	Updated document to reflect pre-grad non-WBT pathway	Allows schools to bulk register individuals without requiring WBT
3/22/2023	Updated document to explain that uploads will not change e-mail addresses.	Email address is used as a unique identifier. AST is the authority for e-mail address, so any changes to e-mail addresses must be made with AST.
03/29/2023	Added Report section	Schools can now run reports under School > Reports.
4/11/2023	Added instructions to modify an existing Offering	Some schools have needed modify Offering details after the Offering has been approved. Section 6.1 includes instructions for change.

INTRODUCTION

Schools are required to complete an Exam Request Form and send it directly to PSI to initiate a request. Requests must come with all exam details and a test date at least 30 days in advance of the that respective date. PSI reviews the requests and either approves the request or provides feedback back to the school to renegotiate details. Once approved, PSI creates an exam code and notifies the school.

This process will be managed in NBSTSA's new LearningBuilder site.

1. ACCESS LEARNINGBUILDER

Schools can access LearningBuilder directly by going to
https://nbstsa.learningbuilder.com/account/login

2. EXAM OFFERING REQUEST

Schools are able to submit a request with all necessary details to PSI, so that they can hold an examination at their desired location. The below details are included in a request:

- School Name
- City
- State
- Program Director Name
- Program Director Phone
- Program Director Email
- Requested Test Date
- Requested Test Time
- Address of Exam Location
- Number of candidates
- Proctor Name
- Proctor Phone
- Proctor Email
- Alternate Contact Name
- Alternate Phone
- Alternate Email

Exam Request Steps

1. In the horizontal blue bar go to the School menu and select Exam Offerings

2. Select Create Exam Offering.

    a. A pop up window will launch for you to select the exam type, CST or CSFA.

3. Set your exam offering title. I.e. "Princeton January 8th Exam" or " Colorado U - Bird Hall Exam".

    a. Select Continue to proceed. The pop up will refresh to entering the exam request details

4. The exam request is organized into three sections for you to complete. All fields denoted with a * are required fields.

    a. Once all required details are entered you may select Submit to send your request to PSI.

    b. All requests must be at least 30 days in the future.

    c. If you exit the pop up or save your request to complete later, the Exam Offering area will provide a queue for all your exam requests.

5. Once Submitted, you will receive a confirmation email.

    a. You may review the email in your email client inbox or go to MyAccount in the top right. There is a communications section in your account that will list all notifications sent from the system.

6. If PSI has any issues with your request they will send the request back to you via an inquiry for you to address.

    a. A notification will be sent if an inquiry is indicated by PSI.

7. Once a request has been approved a notification will be sent from PSI with the exam offering code. This code will be used later in the process when setting up your students and their applications.

8. The exam offering will be sent back to the school on approval to upload rosters. The Upload Complete button should be selected once the next section is completed.

    a. You also have the option to request an exam offering modification after approval if details change that need to be reviewed by PSI (see Section 6.1).

3. STUDENT IMPORT PROCESS

When an offering request is approved the school should be prepared to import their students into LearningBuilder and start their applications on their behalf. It is very important these steps are completed in the same sitting, as intermittent imports or partial completion of the import process may result in issues with student's applications.

Student and Application Import Steps

1. In the horizontal blue bar go to the Admin menu and select Data Import
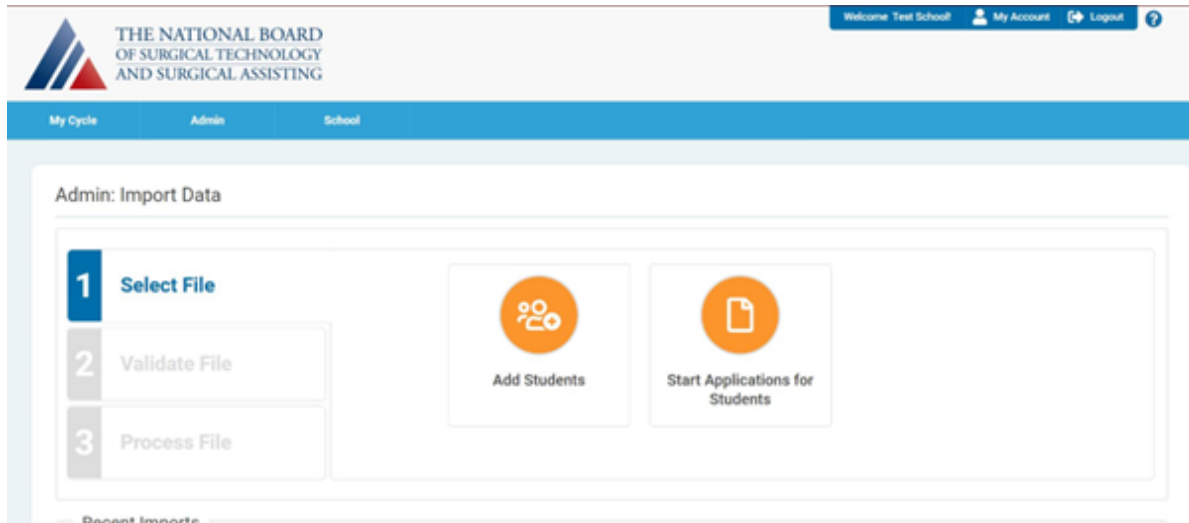
2. There are two data import options for schools.

   a. Add Students –Complete this first. It will your students to the system.

   b. Start Applications for Students – Complete this second. This will start and stage the applications for your students with the necessary information.

      i. These imports should be done together unless you do not use Offerings.

3. Each import option comes with an attached template.

   a. It is important that these templates or any files used for imports be saved as a CSV file type.

   b. Important data elements for import include:

      i. Student's AST Member Number

      ii. Student's email address (please use the e-mail address on file with AST)

      iii. Exam Offering Code

         Important: If your students will be testing directly with NBSTSA at a testing center and not on campus (without an offering), please enter "NA" in the upload template.

   c. Additional instructions are provided in each import template for reference.
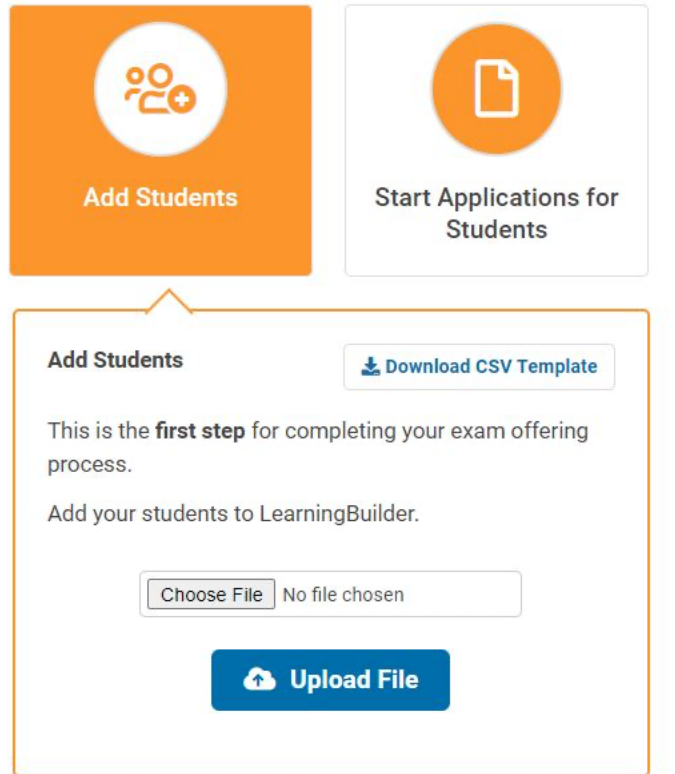
4. Once a file is uploaded the system will validate the file and data to ensure it is in the correct format before proceeding for sign off for processing the import.

5. Students can be notified to access the system once their applications have been started to complete the application submission process.

Please consider the following conditions that govern whether your student uploads correctly.

| If your data is like this. . .	. . .this happens. . .	Because of this
If you try to upload a person without a Unique ID (a.k.a., AST ID) and Email address	The system will indicate you did not provide enough identifying information	The system needs these identifiers to ensure we create the right person.
If you try to upload a person with a Unique ID and an e-mail address that belongs to another person	The system will tell you that you cannot add a new person with an existing e-mail address.	The system needs each person to have a unique way to contact them through e-mail.
If you try to upload a person with a Unique ID (a.k.a., AST ID) with a different e-mail address from what the system has on record.	The system will update the person's record who matches the Unique ID (a.k.a., AST ID) but leave the e-mail address as it was.	At this time, AST is the central authority for the student's email address, so the e-mail address must be changed in AST's database.

4. BULK PAYMENT PROCESS

When importing the students you can indicate whether the school is covering the payment of their application by setting the School Payment Flag to Yes. This will ensure when your student proceeds with the application submission process they are not required to pay. Instead, upon submission, the application will be sent to a school payment step for you to complete payment. A notification will also be sent to alert you an application is ready for payment.

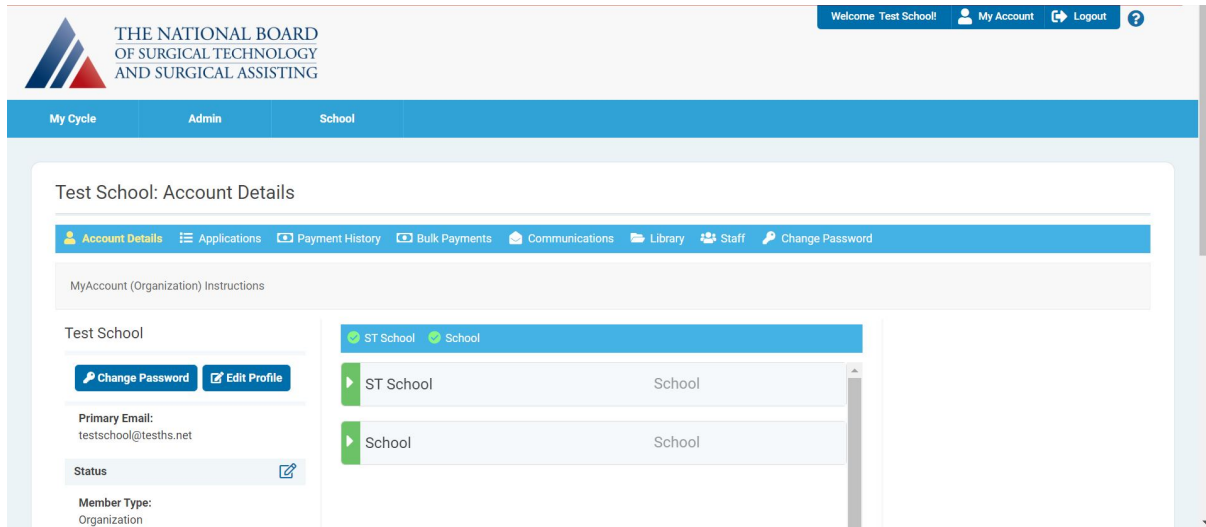NBSTSA will not review applications until payment is received.

You have the option to pay for a single student or a group of student applications at once with the bulk payment feature.
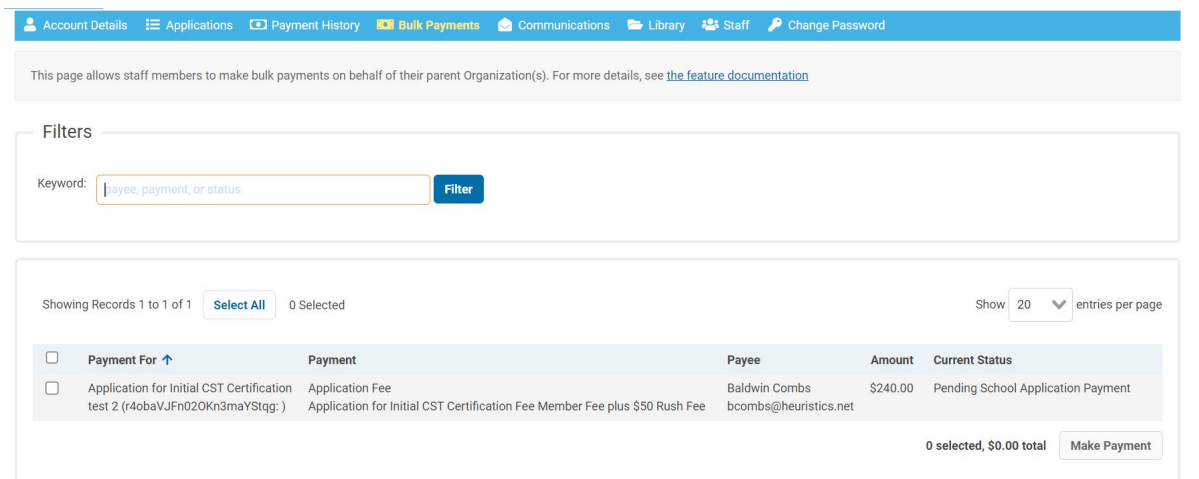
Bulk Payment Steps

1. Once logged into LearningBuilder go to your MyAccount area. This can be reached in the top right area of the window.
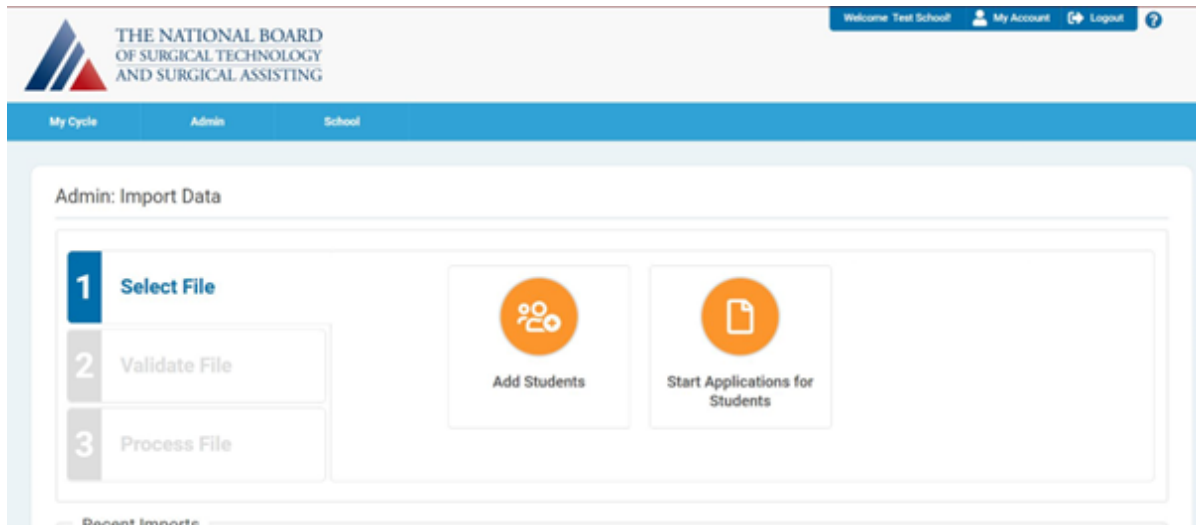
MyAccount Area

2. Select the Bulk Payment menu in the smaller blue horizontal bar in the center of the screen.


3. The bulk payment area will provide a list of all applications that are on the school payment step. You may select the check box on the far left to select individual or multiple applications for payment.
   a. When all desired applications are selected please trigger Make Payment button in the bottom right to enter your credit card details.
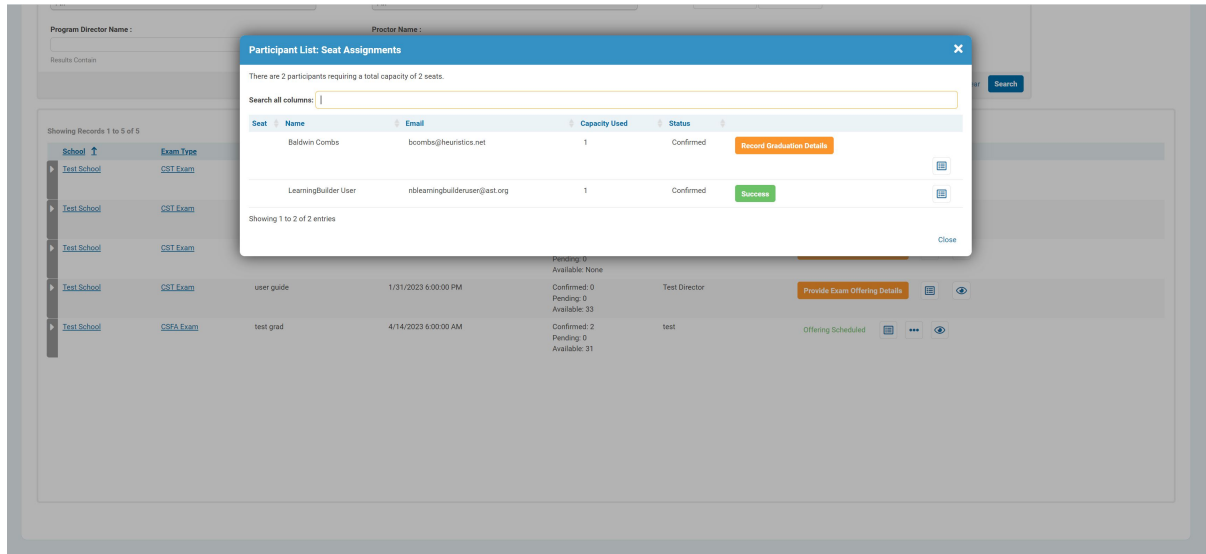
5. RECORD GRADUATION DETAILS

When scores received a notification will be sent to schools. You will be able to log back in to see the exam result and input the graduations details which include the graduation date and proof of graduation.

Score Release Steps

1. Go to your Exam Offering queue
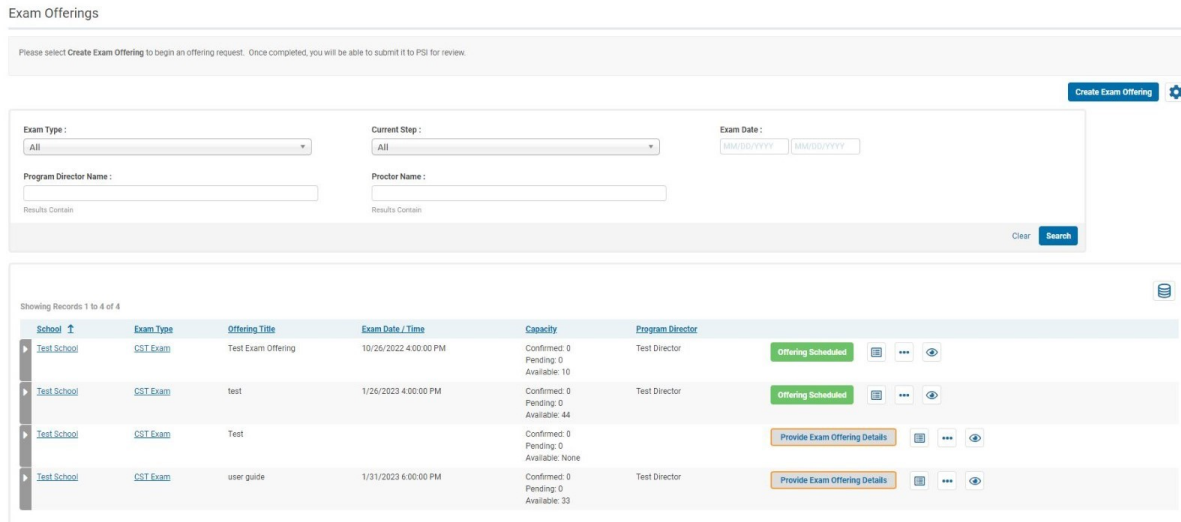
2. Select the eye icon to see the applications associated your offering

3. Select Record Graduation details to input the graduation date and proof of graduation for NBSTSA to review. Once NBSTSA validates the details they will release the scores.

6. SCHOOL OFFERING QUEUE TIPS

Your exam offering queue will show you all your schools previous exam offering as well as requests that are still in process. Below are some tips for using the queue.

- Using the filters can help reduce the results shown in the bottom if your school offers many exams.

- The "eye" icon will show you where your students' applications are in the submissions process. *Note this area will be blank after import and is set once the student selects the offering they are attending during the submission process. This can be helpful in determining which students to follow up with or determining when to complete a bulk payment.

6.1 To modify an existing Offering

You can request a change to an Offering after it has been approved.

Note: Please do not make any changes within 72 hours of the scheduled date. Any requests may be denied or result in a poor experience for your students.

To modify an Offering after it has been approved, follow these steps to modify the Offering:

1. Access the Offerings Queue

Offering Title	Exam Date / Time	Capacity	Program Director				
ST Class April End	3/31/2023 10:00:00 AM	Confirmed: 7 Pending: 0 Available: None	Sandra Namio	Offering Scheduled	▤	•••	👁

2. Click the ••• icon next to the Offering you wish to change.

3. Click the "Edit" button to open the Offering.

Offering Title	Exam Date / Time	Capacity	Program Director			
ST Class April End	3/31/2023 10:00:00 AM	Confirmed: 7 Pending: 0 Available: None	Sandra Namio	Offering Scheduled	📝 Edit	👁

The Upload Roster page displays with a Request Modification button.

03/20/2023 ACC-Anaheim: Upload Roster ✕

Please complete the import of your student applications in LearningBuilder before selecting **Upload Complete**.

If details of the exam need to be modified please input details and select **Request Modification**. These details will be reviewed by PSI and sent to attendees to alert them of the modification.

⚙

Offering Code: Site 17341 - 3.20.2023

Exam Modification Details:

✂ 🗐 📋 📋 📋 ↶ ↷ ✓ᴬᴮᶜ ▪ ☰ ☰ 99 **B** *I* <u>U</u> abc x_2 x^2
🔗 🔗 ≡ | Format ▾ | ⤢ ▴

Roster: American Career College - Anaheim WBT R&R.pdf 📥 📄

Request Modification | Finish Later | Cancel | Upload Complete

4. Enter details you wish to change and click the **Request Modification** button.

5. When you are satisfied with the changes, click the **Upload Complete** button.

    This will send the request for review. When the Offering has been approved, you will receive a notification that the Offering has been approved. Any registered attendees will receive an e-mail notification that includes the new details of the change.

7. TRAINING VIDEOS

All videos are password protected. The password is NBSTSAtraining.

LearningBuilder Access & Exam Offering Request - https://vimeo.com/790161983

Student and Application Import Process - https://vimeo.com/790223029

Bulk Payments - https://vimeo.com/790814354

8. REPORTS

Schools have access to a Report area in LearningBuilder to run reports created specifically for them. This area can be reached by going to the School menu > Reports.
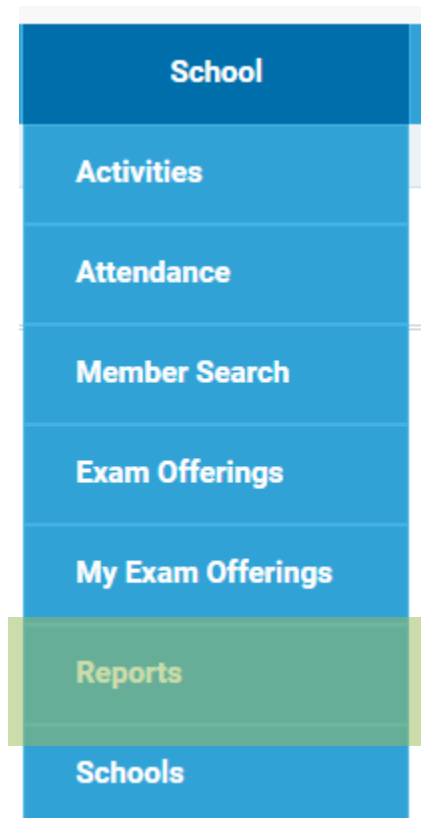
8.1 School Score Report

This report will show all pre-graduate scores associated to a school in LearningBuilder. It will display the score details, exam date, and if this was their first attempt. First attempt will be indicated with a

Y and the additional attempts with a N. To access the report, click the name of the report or the icon.

Reports

Exam

School Score Report   👁

This report will show all pregrad scores associated to a school in LearningBuilder. It will display the score details, exam date, and if this was their first attempt. First attempt will be indicated with a Y and the additional attempts with a N.

Screen shot of the School Score Report selection

UniqueId	Member Name	LearningPlanTitle	Exam Date	Exam Results	Total Score (Raw)	Topic 1 (Raw Score)	Topic 2 (Raw Sco...	Topic 3 (Raw Scor...	First Attempt
123456	First Last	Application for Initial CST Certification	03/21/2023	Pass	109	65	20	24	Y
123456	First Last	Application for Initial CST Certification	03/21/2023	Fail	87	55	12	20	Y
123456	First Last	Application for Initial CST Certification	03/21/2023	Fail	92	59	17	16	Y
123456	First Last	Application for Initial CST Certification	03/21/2023	Fail	101	63	15	23	Y
123456	First Last	Application for Initial CST Certification	03/21/2023	Fail	83	52	13	18	Y

Screen shot of the data shared in the School Score Report (layout may vary)