Heuristic
SOLUTIONS
INFORMATION STRATEGIES

NBSTSA
Exam Offering Process
School User Guide

Table of Contents

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.
4/12/2023	Added instructions to explain how to look up the Unique ID for uploads.	Not all schools know their student's Unique IDs. This section describes how to use
7/7/2023	Changed Exam Offering example	The offering titles follow a certain convention that needs to be displayed in the examples.
09/23/24	Revised all instructions for workflow import queue innovations	NBSTSA sponsored innovations to improve the file import process and create manual data entry process.

INTRODUCTION

Schools are required to complete an Exam Offering Request in LearningBuilder and send it directly to PSI to initiate a request. Requests must come with all exam details and a test date at least 45 days in advance of 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. TRAINING VIDEOS

NBSTSA has prepared three videos to walk you through the tasks Schools need to perform in LearningBuilder. Please see the written instructions for the most current instructions if you see something that is not a perfect match in the videos.

All videos are password protected. The password is NBSTSAtraining.

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

Data Import Process - https://vimeo.com/1017132742

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

2. ACCESS LEARNINGBUILDER

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

3. EXAM OFFERING REQUEST

Schools can 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
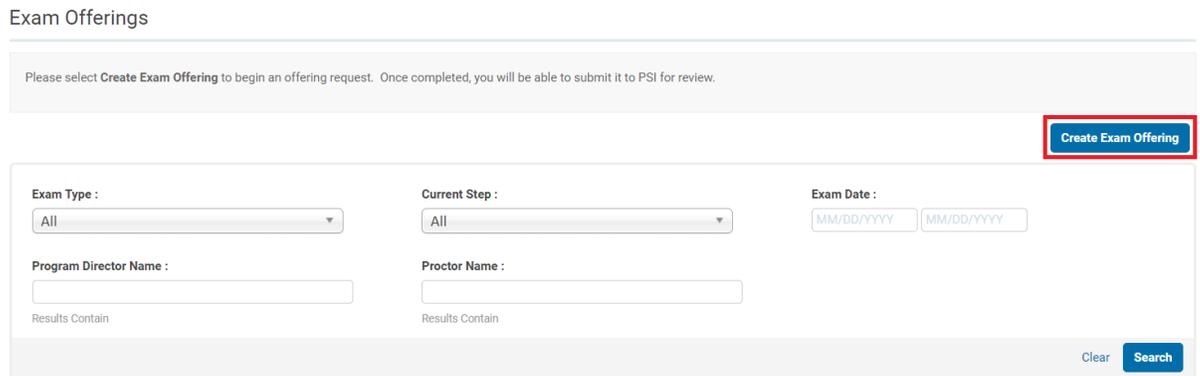- Number of candidates
- Proctor Name

- 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
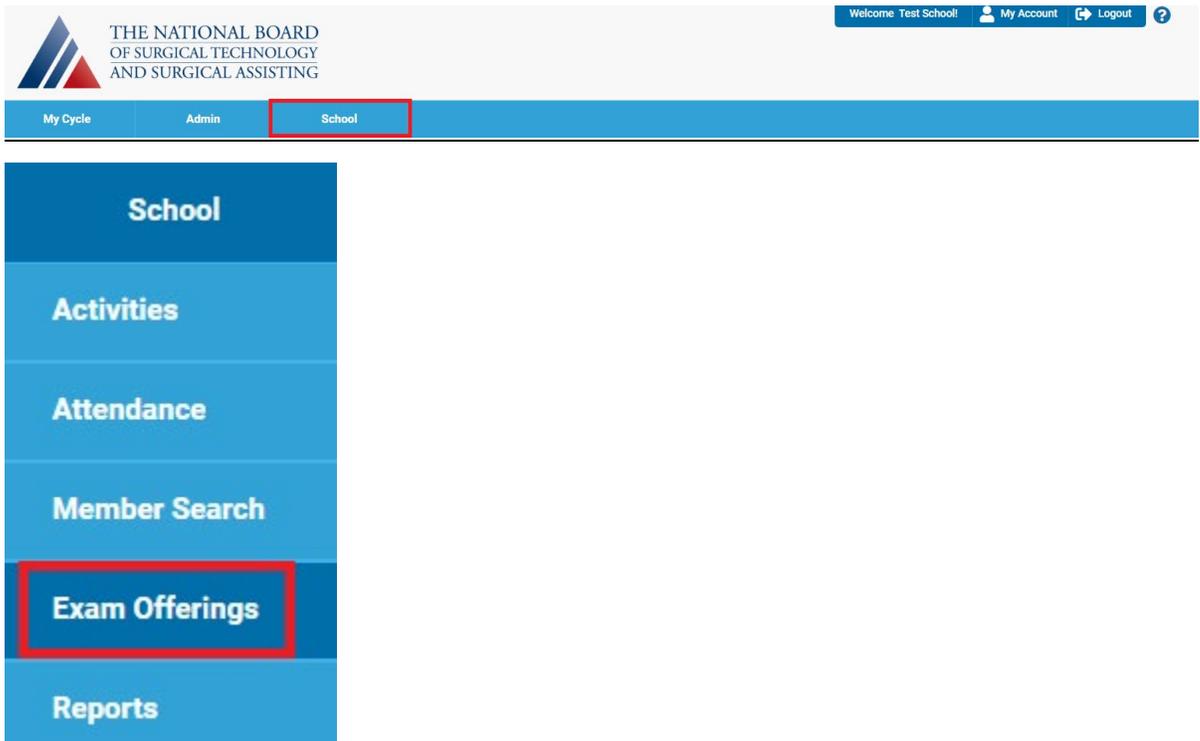
2. Select Create Exam Offering.

3. Choose the exam type in the pop-up window, CST or CSFA.

Add Offering   ✕

Activity		Dates
Certified Surgical First Assistant (CSFA) Exam (A0036)		**Select**
Certified Surgical Technologist (CST) Exam (A0010)		**Select**

Cancel

4. Enter the title for your exam offering, such as "Colorado College 12/18/23". Once you have entered the title, click on "Continue" to proceed to the next step. The pop-up window will then refresh, allowing you to enter the details for your exam request.

Add Offering   ✕

The offering title is a unique title that is created for each offering. The title should provide context on the offering ideally. For example, Green State Univ - 03/17/23 - Blue Hall Exam.

Activity: Certified Surgical Technologist (CST) Exam (A0010)

Offering Title*:   Colorado College 12/18/23

Owner*:   Test School

Cancel   **Continue**

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

    a. <u>All requests must be at least 45 days in the future</u>. In case you choose an invalid date, an error message will appear, and you won't be able to proceed.

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

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

6. 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. The Communications section in the blue bar will list all notifications sent by the system.
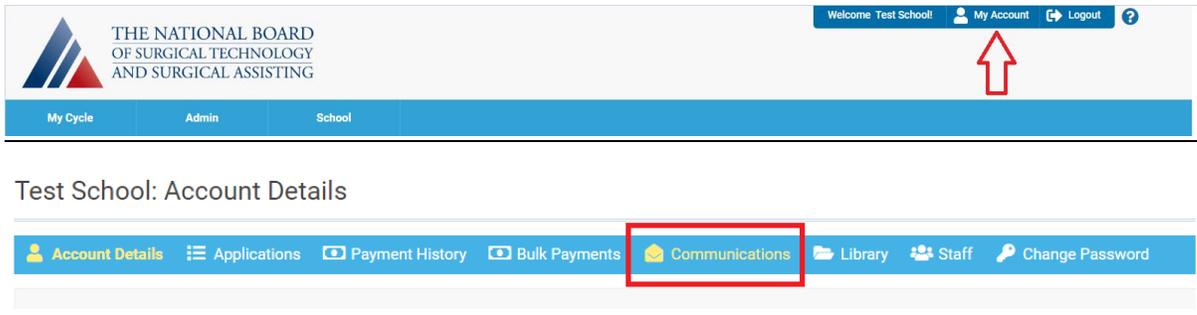
7. If there are any issues with your request, you will receive an email.

8. After a request approval, you will receive an email notification containing the exam offering code. This code will be required while setting up students and their applications. You can find this notification in the Communications area as well.

<u>Upload Roster - Use the Group Membership Processing page from AST GB if you have that as this is NOT a *CSV file. IF you did not purchase a GB, then upload a Word doc or PDF that list Full legal name, account number and personal email address.*</u>

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.

1. Return to *Exam Offering* under the School section, and search for your Offering. It is helpful to use the Current Step filter to narrow the results to the offerings on the Upload Roster step.

2. Find the offering, and push Submit Roster

3. The exam roster has already been uploaded in the Exam Offering process. You can now select from the following options:
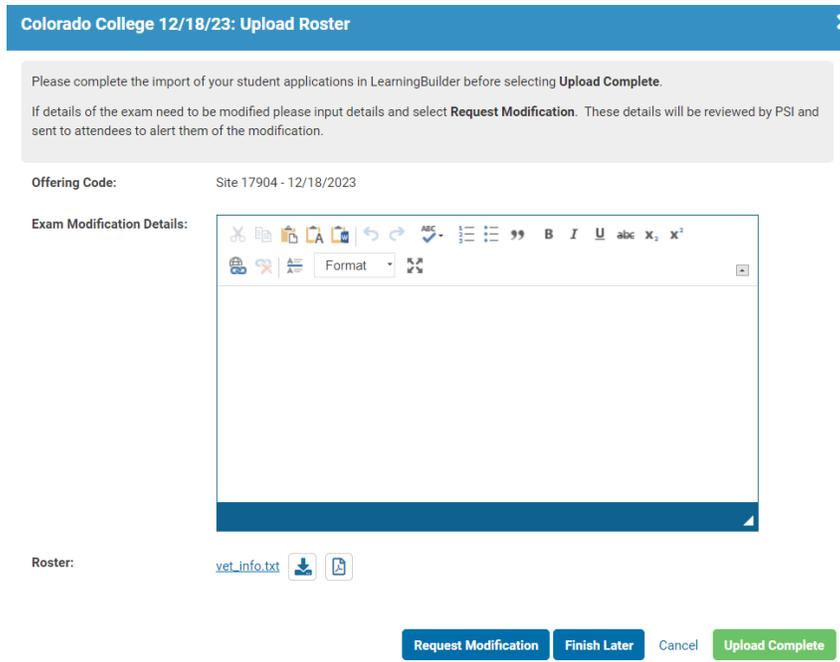
a. If there are any changes that need to be reviewed by PSI after approval, you can request an exam offering modification (refer to Section 6.1).

b. You can choose to Finish Later and save your progress for later.

c. To complete the exam offering, select Upload Complete.

4. The Exam Offering is now scheduled.

4. 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 students' applications.

4.1 Determine exam type

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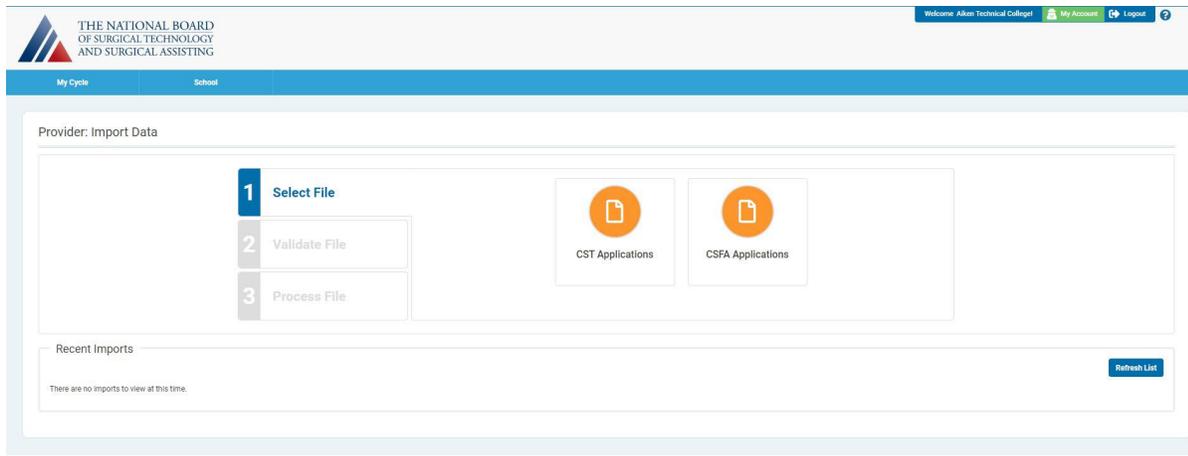
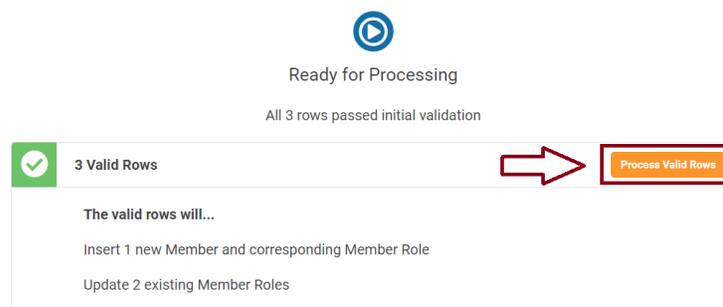2. There are two data import options for schools:

    a. **Upload File** – This option requires a school to import a single file with all of their students information and is ideal for bulk set up. A CSV template is linked for reference. All files must be a CSV, comma separated value, file type.

    b. **Enter Manually** – This option requires a school to manually enter data for each student and is ideal for single record entry.

    c. **Important Instructions:**

        i.   The Unique ID will be the students AST Number.

        ii. Email address should be identical to the information in AST.

        iii. WBT - Role will be Yes if a student is associated to an offering. If a pregrad is not attending an offering input NA.

        iv. Offering Code - Role will be the full offering code provided by PSI on your offering request eg. Site 17606 - 12/6/2024 - K24psA_P (Offering codes must be copied from the word Site to the very end of any numbers of letters) . If a pregrad is not attending an offering input NA.

        v.   School Payment Flag - Role will be Yes if school is paying for student, or No if the student is paying NBSTSA. Leave blank if Gold Bundle has been purchased.
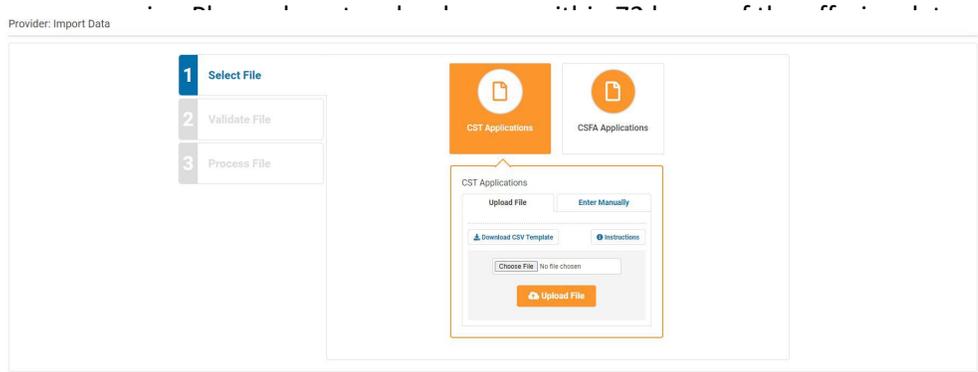
3. When importing data via a file, there is a template that comes along with each option. It's crucial to download a new template for every import, as the template may change occasionally.

	A	B	C	D	E	F	G	H
	:UniqueId	:Email	First Name Import	Last Name Import	WBT - Role	Offering Code - Role	School Payment Flag - Role	
	12345	importtester@hstest.net	Import	Tester	Yes	Site 0000 - 12/18/2000	Yes	

   a. To ensure proper importing, save any templates or files as a CSV file type.

   b. Important data elements for import include:

      i. Student's AST Member Number > Unique ID

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

      iii. Exam Offering Code - **Important:** If your students are testing directly with NBSTSA (without an offering), please enter "NA" in the upload template.

      iv. School Payment Flag – If a school will be paying for students applications

   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. Please click the orange process button to ensure your upload has been successfully processed.

Ready for Processing

All 3 rows passed initial validation

	3 Valid Rows	Process Valid Rows

The valid rows will...

Insert 1 new Member and corresponding Member Role

Update 2 existing Member Roles

6. Once both CSV files have been uploaded and processed, the school must notify the students to access the system and complete the application submission process. Schools can select View Student Applications to confirm everything was set up correctly.

   a. Your students do not need to create an account. If there are further questions, please contact the Web Based Testing Department.

6. Manual Data Entry

    a. A pop will first render that will require the same fields that are collected in the spreadsheet.

    b. After the first record is processed, the screen will refresh and allow you to either Add Another record or View Student Applications. If you choose Add Another it will copy the previous data to reduce data entry.

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.

5. 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
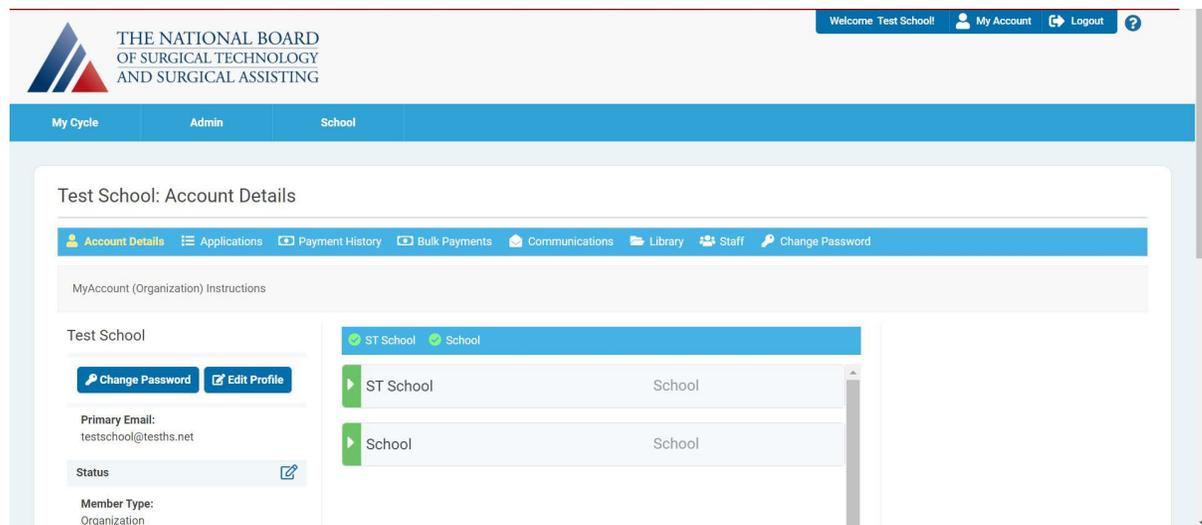
2. Select the Bulk Payment menu in the smaller blue horizontal bar in the center of the screen.

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.

6. RECORD GRADUATION DETAILS

When scores are received (takes 48 hours) 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.

**<u>Score Release Steps</u>**

1. Go to your Exam Offering queue.

2. Select the eye icon to see the applications associated with your offering.
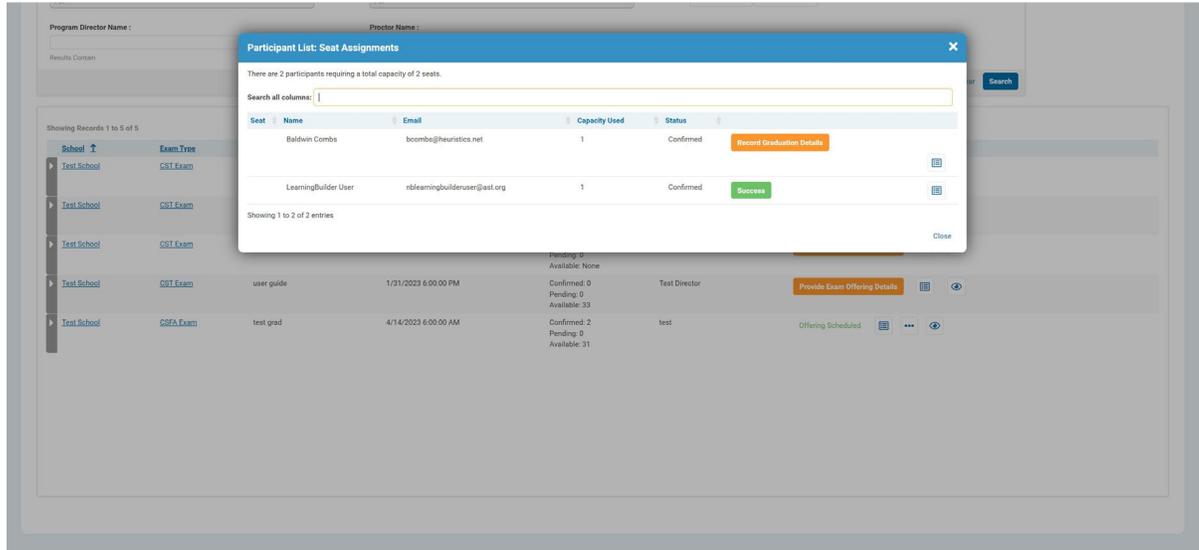
3. Select Record Graduation details to input the graduation date and proof of graduation for NBSTSA to review. Once NBSTSA validates the details they will release the scores.

7. SCHOOL OFFERING QUEUE TIPS

Your exam offering queue will show you all of your school's previous exam offerings and requests still in process. Below are some tips for using the queue.
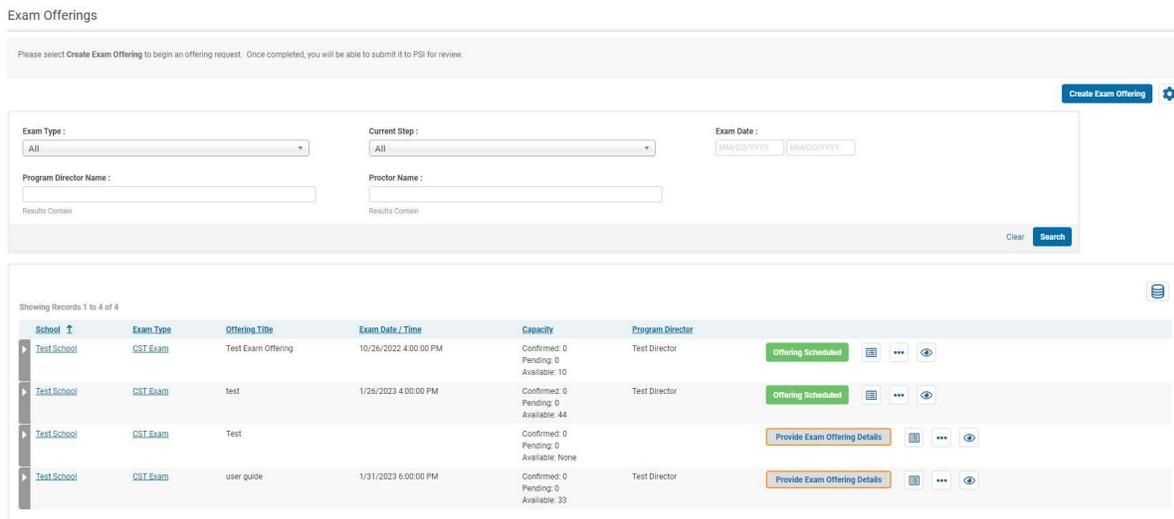
•   Using the filters can help reduce the results shown in the bottom if your school offers many exams.

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

7.1 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

2. Click the [...] icon next to the Offering you wish to change.

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

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:

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

Request Modification   **Finish Later**   Cancel   **Upload Complete**

4. Enter the 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.

8. REPORTS

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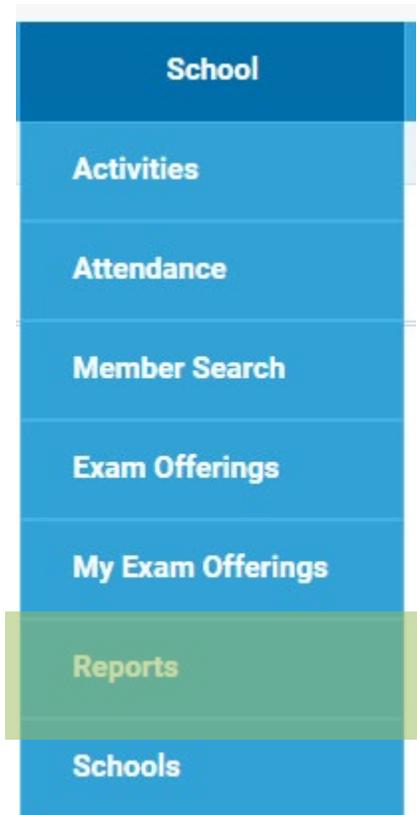
8.1 School Score Report

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)

To export results in Excel format, click the ⊠ icon above the "School Score Report (Exam)" header.
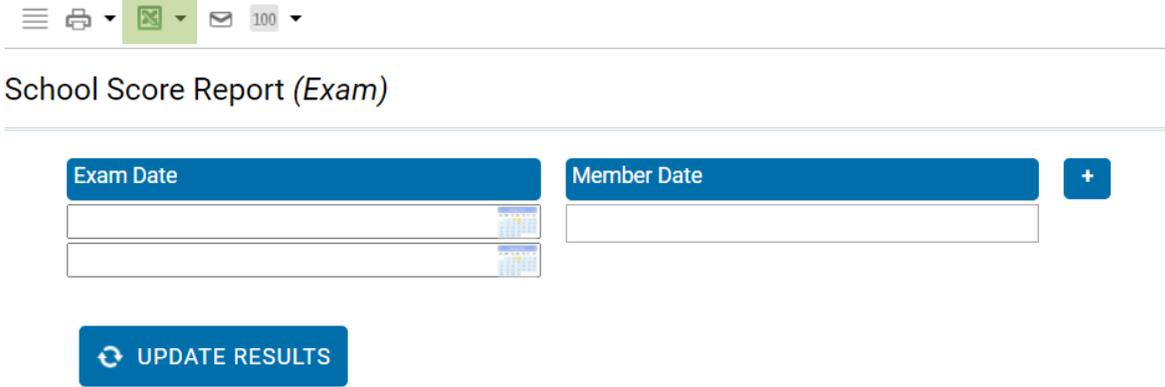
Shows the School Score Report and highlights the Excel export feature.