

# National Board Certification Partner Portal User Guide: Funding Setup and Designation

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 describes how TPPs set up funding and allocate designations via the Partner Portal. It starts with an explanation of Account Summary and explains the following processes:

- creating and modifying purchase orders
- designating funds to a candidate
- accessing/downloading designation and financial reports

To get started with these processes, visit the [Partner Portal Sign In page](#) to sign in to your account.

## TPP Details

Third-Party Payer (TPP) Primary or Secondary users can access TPP account details or submit a new Purchase Order (PO) by logging in to the Partner Portal. Navigate to the TPP Management section and click on the “View TPP Details” tile to get started.

### Account Summary

On the View TPP Details screen, click the name of the TPP in the “TPP Name” column in the table.

The TPP Information screen displays the Account Summary table that includes the following balance summaries:

Account Summary								<a href="#">Credit Card Deposit</a>	<a href="#">Manage Designations</a>	<a href="#">Financial Reports</a>
Payment Description		Balance Totals			Designation Totals			Breakdown		
Funding Type	Payment Type	Account Receivable Balance	Funded Amount	Refundable Balance	Available Funding Amount	Promised Funding	Fully Distributed Total	Details		
Escrow	Cash	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	<a href="#">Escrow Breakdown</a>		
Current Funding	Cash	\$0.00	\$4,655.00	\$4,652.00	\$4,652.00	\$0.00	\$3.00	<a href="#">Cash Breakdown</a>		
<a href="#">Purchase Orders</a>	Purchase Order	\$100,800.00	\$101,575.00	\$571.00	\$87,847.00	\$6,935.00	\$6,793.00	<a href="#">PO Breakdown</a>		
<b>Net Summary Totals</b>		<b>\$100,800.00</b>	<b>\$106,230.00</b>	<b>\$5,223.00</b>	<b>\$92,499.00</b>	<b>\$6,935.00</b>	<b>\$6,796.00</b>			

*Account Summary page*

## Payment Description

- **Escrow:** All of the TPP's unused cash payments from previous cycles are reflected here. Escrow can be used for future designation or refunded upon request.
- **Current Funding:** All of the TPP's cash payments for the current cycle, including checks and wire transfers, are reflected here.
- **Purchase Orders:** All of the TPP's purchase orders are tracked here.

## Balance Totals

- **Accounts Receivable Balance:** This is the amount due to the National Board. If the TPP has submitted Purchase Orders, this balance considers the funded amount minus any completed payments.
- **Funded Amount:** This is the amount that the TPP has submitted in the form of cash or Purchase Orders.
- **Refundable Amount:** This is the amount that is eligible for refund. To request a refund, complete the [Third Party Payer web form](#) and allow up to 7 business days for a response. As a reminder, the registration fee is non-refundable.

## Designation Totals

- **Available Funding Amount:** This is the amount that the TPP has available to fund candidates for designations.
- **Approved/Pending Total:** This is the amount of funding that the TPP has designated to candidates and is waiting to be utilized.
- **Fully Distributed Total:** This is the amount of funding that the TPP has designated to candidates and has been utilized.

## Breakdown Details

To view a detailed breakdown of approved cash and PO transactions, click on the corresponding "Breakdown" link. This will provide access to screens showing the PO and cash breakdowns and links to additional details. For example:

### *Escrow Breakdown*

The Escrow Breakdown is similar to the Cash Breakdown, outlined below.

### *Cash Breakdown*

The Cash Breakdown includes a hyperlink to the Current Cycle Cash Breakdown:

- **Payment Type:** Examples include wire transfer, check, credit card
- **Transaction ID:** Transaction number
- **Check No.:** Wire number, check number, credit card transaction number
- **Amount:** Dollar amount of wire/funding
- **Undesignated Balance:** The amount that has not been designated to a candidate

- **Status:** Example includes “Valid”
- **Deposit Date:** Date deposit was made

### *PO Breakdown*

The PO Breakdown section includes a hyperlink for each PO number:

- **PO Number:** Click on the PO number to view detailed PO information, including associated artifacts.
- **PO Created Date:** This is the date your PO was submitted.
- **PO Amount:** This is the amount of the PO.
- **PO Balance:** This is the amount due to the National Board.
- **Undesignated Balance:** This is the amount you have available to fund candidates.
- **Status:** This column tracks whether there is a balance owed for each PO. If the status is “Open” there is a balance due. If the status is set to “Closed,” the PO is fully paid.
- **PO Payment Details:** The “PO Payment Details” hyperlink provides information on how the PO was paid.
- **PO Modification Details:** The “PO Modified Details” hyperlink shows any modifications made to the PO.
- **Invoice No.:** The invoice number serves as a hyperlink to your invoice. If needed, you can print a copy of the invoice for your records.

The Account Summary updates as changes are made to the account.

## Purchase Orders

### Create New Purchase Order

To submit a new PO, click “TPP Management” in the left navigation, then click the “View TPP Details” icon. On the View TPP Details screen, click the name of the TPP in the “TPP Name” column in the table.

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Sign Out

Pearson Admin

Home / TPP Management / View TPP Details

### View TPP Details

trust

TPP ID	TPP Name	TPP City	TPP State	TPP Country	TPP Address	TPP Status
3511	<a href="#">Jacksonville Educational Trust</a>	Jacksonville	AL	United States of America	P.O. Box 997	Active
5613	<a href="#">reg Trust</a>	kolkata	AK	United States	abc road	active
5631	<a href="#">pearson 2 trust</a>	kolkata	Ak	United States		active
5633	<a href="#">tpp v2 trust</a>	kolkata	Ak	United States	abc road city	active

Showing 1 to 4 of 4 rows

Escrow	Cash	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	<a href="#">Escrow Breakdown</a>
Current Funding	Cash	\$0.00	\$4,851.00	\$2,456.00	\$2,456.00	\$0.00	\$3,595.00	<a href="#">Cash Breakdown</a>
<a href="#">Purchase Orders</a>	Purchase Order	\$81,461.00	\$83,005.00	\$494.00	\$78,917.00	\$475.00	\$1,900.00	<a href="#">PO Breakdown</a>
<b>Net Summary Totals</b>		<b>\$81,461.00</b>	<b>\$87,856.00</b>	<b>\$2,950.00</b>	<b>\$81,373.00</b>	<b>\$475.00</b>	<b>\$5,495.00</b>	

Selecting a TPP name on View TPP Details page

On the TPP Information screen, scroll down to the Account Summary table and click “Purchase Orders” in the Payment Description>Funding Type column.

Home / TPP Management / View TPP Details / TPP Information

### TPP Information

TPP ID:  TPP Name:   
 Address 1:  Address 2:   
 City:  State:   
 Zip:  Country:

Account Summary [Credit Card Deposit](#) [Manage Designations](#) [Financial Reports](#)

Payment Description		Balance Totals			Designation Totals			Breakdown
Funding Type	Payment Type	Account Receivable Balance	Funded Amount	Refundable Balance	Available Funding Amount	Promised Funding	Fully Distributed Total	Details
Escrow	Cash	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	<a href="#">Escrow Breakdown</a>
Current Funding	Cash	\$0.00	\$4,655.00	\$4,652.00	\$4,652.00	\$0.00	\$3.00	<a href="#">Cash Breakdown</a>
<b>Purchase Orders</b>	Purchase Order	\$100,800.00	\$101,575.00	\$571.00	\$87,847.00	\$6,935.00	\$6,793.00	<a href="#">PO Breakdown</a>
<b>Net Summary Totals</b>		<b>\$100,800.00</b>	<b>\$106,230.00</b>	<b>\$5,223.00</b>	<b>\$92,499.00</b>	<b>\$6,935.00</b>	<b>\$6,796.00</b>	

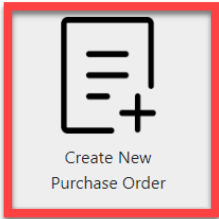
Selecting “Purchase Orders” funding type on TPP Information page

On the “Manage Purchase Orders” page, click the “Create New Purchase Order” icon.

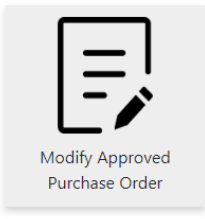
### Manage Purchase Orders

TPP ID:  TPP Name:

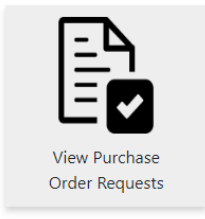
You can create new purchase orders or edit existing purchase orders here:



Create New Purchase Order



Modify Approved Purchase Order



View Purchase Order Requests

Selecting “Create New Purchase Order” icon on Manage Purchase Orders page



- Complete the Create New Purchase Order form, including instructions and PO dollar amount, add any attachments (such as TPP Designation [see [“Manage Designations”](#) section below]), and click the “Submit” button.

Home / TPP Management / View TPP Details / TPP Information / Manage Purchase Orders / Create New Purchase Order

### Create New Purchase Order

Please add instructions for the purchase order here:

Create a PO to provide designations to candidate.

Please enter the purchase order amount here:

4000

Please upload your purchase order(s)

Drop file here or click to upload

Uploaded Files:

- tppPOControls.csv Remove

Submit

*Sample completed Create New Purchase Order form*

- You will be directed to the “Purchase Order Breakdown” page. Click the “View Purchase Order Requests” button that directs you to a table of all requests made with the status of each. Newly submitted requests will have “Pending Approval” status and you can download artifacts/documents.

Home / TPP Management / View TPP Details / TPP Information / Purchase Order Breakdown

### Purchase Order Breakdown

TPP ID: 5613      TPP Name: reg Trust      [View Purchase Order Requests](#)

Search

PO Number	PO Created Date	PO Amount	PO Balance	Undesignated Balance	Status	PO Payment Details	PO Modification Details
po111	04/14/2024	\$1,000.00	\$0.00	\$50.00	Closed	<a href="#">View Here</a>	<a href="#">View Here</a>
po22	04/15/2024	\$3,000.00	\$3,000.00	\$1,575.00	Open	<a href="#">View Here</a>	<a href="#">View Here</a>
PO11	05/21/2024	\$50,000.00	\$50,000.00	\$48,787.00	Open	<a href="#">View Here</a>	<a href="#">View Here</a>

### Purchase Order Breakdown

TPP ID: 5613      TPP Name: reg Trust      [View Purchase Orders](#)

Search

Request ID	Requested Date	PO Amount	Status	Request Type	PO Instructions	Submitted By	Download Attachments
1715781494836	05/15/2024	-	Pending Approval	Modify PO	test	RegPTPP user	<a href="#">Download</a>
1715781655628	05/15/2024	\$900.00	Rejected	Add PO		RegPTPP user	<a href="#">Download</a>
1717151470937	05/31/2024	-	Modified	Modify PO	modify po	Pearson Admin	<a href="#">Download</a>
1717151548025	05/31/2024	\$70,000.00	Modified	Modify PO		Pearson Admin	<a href="#">Download</a>
1717151647065	05/31/2024	\$60,000.00	Modified	Modify PO		Pearson Admin	<a href="#">Download</a>
1717151757080	05/31/2024	\$1,000.00	Modified	Modify PO	1000	Pearson Admin	<a href="#">Download</a>
1717689272964	06/6/2024	\$5,000.00	Pending Approval	Add PO	Create a PO to provide designation to candidate	Pearson Admin	<a href="#">Download</a>

- Check your inbox within 7 business days for an email from the unmonitored sender "[No-Reply@NBPTS.org](mailto:No-Reply@NBPTS.org)" for next steps.
- If your PO is approved, it will be added to your Purchase Order Breakdown summary, and your Balance and Designation totals will be appropriately adjusted.

Purchase Order Breakdown

TPP ID: 5613 TPP Name: reg Trust [View Purchase Order Requests](#)

Search

PO Number	PO Created Date	PO Amount	PO Balance	Undesignated Balance	Status	PO Payment Details	PO Modification Details	Invoice No.	Designations
7	05/31/2024	\$899.00	\$899.00	\$899.00	Open	<a href="#">View Here</a>	<a href="#">View Here</a>	515	Designations
8	05/31/2024	\$899.00	\$899.00	\$899.00	Open	<a href="#">View Here</a>	<a href="#">View Here</a>	516	Designations
9	05/31/2024	\$777.00	\$777.00	\$777.00	Open	<a href="#">View Here</a>	<a href="#">View Here</a>	517	Designations
10	05/31/2024	\$444.00	\$0.00	\$444.00	Closed	<a href="#">View Here</a>	<a href="#">View Here</a>	518	Designations
1132	06/6/2024	\$5,000.00	\$5,000.00	\$5,000.00	Open	<a href="#">View Here</a>	<a href="#">View Here</a>	520	Designations

- If your PO is rejected, the status will change to "Rejected," and since it is not in the system, a rejected PO cannot be modified.

Purchase Order Breakdown

TPP ID: 5613 TPP Name: reg Trust [View Purchase Orders](#)

Search

Request ID	Requested Date	PO Amount	Status	Request Type	PO Instructions	Submitted By	Download Attachments
1715781494836	05/15/2024	-	Modified	Modify PO	test	RegPTPP user	<a href="#">Download</a>
1715781655628	05/15/2024	\$900.00	Rejected	Add PO		RegPTPP user	<a href="#">Download</a>

## Modify Purchase Order

If necessary, you can modify an approved, unpaid purchase order.

Click “TPP Management” in the left navigation, then click the “View TPP Details” icon. On the View TPP Details page, click the name of the TPP in the “TPP Name” column in the table, as done above for [creating a new purchase order](#).

On the TPP Information page, scroll down to the Account Summary table and click “Purchase Orders” in the “Payment Description”>”Funding Type” column.

Home / TPP Management / View TPP Details / TPP Information

### TPP Information

TPP ID:  TPP Name:   
 Address 1:  Address 2:   
 City:  State:   
 Zip:  Country:

Account Summary 
[Credit Card Deposit](#) [Manage Designations](#) [Financial Reports](#)

Payment Description		Balance Totals			Designation Totals			Breakdown
Funding Type	Payment Type	Account Receivable Balance	Funded Amount	Refundable Balance	Available Funding Amount	Promised Funding	Fully Distributed Total	Details
Escrow	Cash	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	<a href="#">Escrow Breakdown</a>
Current Funding	Cash	\$0.00	\$4,655.00	\$4,652.00	\$4,652.00	\$0.00	\$3.00	<a href="#">Cash Breakdown</a>
<b>Purchase Orders</b>	Purchase Order	\$100,800.00	\$101,575.00	\$571.00	\$87,847.00	\$6,935.00	\$6,793.00	<a href="#">PO Breakdown</a>
<b>Net Summary Totals</b>		<b>\$100,800.00</b>	<b>\$106,230.00</b>	<b>\$5,223.00</b>	<b>\$92,499.00</b>	<b>\$6,935.00</b>	<b>\$6,796.00</b>	

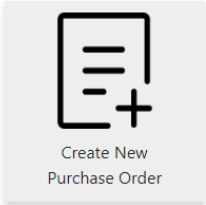
Selecting “Purchase Orders” funding type on TPP Information page

On the “Manage Purchase Orders” page, click the “Modify Approved Purchase Order” icon.

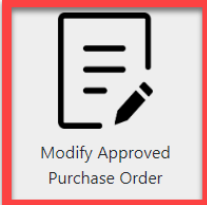
### Manage Purchase Orders

TPP ID:  TPP Name:

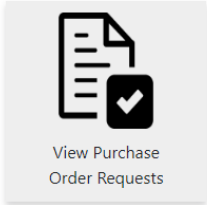
You can create new purchase orders or edit existing purchase orders here:



Create New Purchase Order



Modify Approved Purchase Order



View Purchase Order Requests

Selecting “Modify Approved Purchase Order” icon on Manage Purchase Orders page

You will be directed to the “Modify Purchase Order” screen where all POs currently in “Open” status (i.e., money is still owed for each “open” PO) will be displayed.

Click on the PO to be modified, which directs you to the “Modify Purchase Order” form where you will do the following:

- Add instructions to modify the PO, such as “Please increase amount by \$1000.”
- Enter modified PO amount (i.e., the exact dollar amount that the TPP wants the PO to be).
- Upload any artifacts/documents if increasing your PO amount, include an updated version of your signed PO. (Note: Decreasing the PO amount does not require a revised PO.)

Once the “Modify Purchase Order” form is completed, click the “Submit” button.

### Modify Purchase Order

Select the PO that you want to modify

**PO Number:**  
2132

**Please add instructions for the modification for purchase order:**  
Modify the PO amount from \$5000 to \$4000.00

**Enter modified purchase order amount here:**  
4000

**Attachments:**  
Drop file here or click to upload

**Uploaded Files:**  
• inv2.pdf [Remove](#)

[Submit](#)

*Sample completed Modify Purchase Order form*

View the status of the PO on the Purchase Order Breakdown page: “Pending Approval.” Allow up to **7 business days** for processing.

- If your modification is approved, you will receive an email from the unmonitored sender [No-Reply@NBPTS.org](mailto:No-Reply@NBPTS.org), notifying you of the modification approval, and the PO and Invoice will be updated with the new amount, as indicated on the “Purchase Order Breakdown” page, and your PO Amount, Balance, and Designation totals will be appropriately adjusted.
- If your modification is rejected, you will receive an email from the unmonitored sender [No-Reply@NBPTS.org](mailto:No-Reply@NBPTS.org) that outlines the specific issues with your request, as indicated on the “Purchase Order Breakdown” screen. To address these issues, submit a new modification request or select [Contact Us](#) to call or use the web form.

Purchase Order Breakdown							
TPP ID:	5593	TPP Name:	ABCD	<a href="#">View Purchase Orders</a>			
Search							
Request ID	Requested Date	PO Amount	Status	Request Type	PO Instructions	Submitted By	Download Attachments
1715601328249	05/13/2024	\$500.00	Modified	Modify PO	Please the add 500 to PO	RegPTPP user	<a href="#">Download</a>
1715703415320	05/14/2024	\$1,500.00	Rejected	Modify PO	edit po amount	testsec useragreement	<a href="#">Download</a>

## Credit Card Funding and Payments

As stated previously, there are multiple payment methods, including using a credit card. To use a credit card, click “TPP Management” in the left navigation, then click the “View TPP Details” icon. On the “TPP Information” page, click the “Credit Card Payment” button.

Account Summary								<a href="#">Credit Card Payment</a>	<a href="#">Manage Designations</a>	<a href="#">Financial Reports</a>
Payment Description		Balance Totals			Designation Totals			Breakdown		
Funding Type	Payment Type	Account Receivable Balance	Funded Amount	Refundable Balance	Available Funding Amount	Promised Funding	Fully Distributed Total	Details		
Escrow	Cash	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	<a href="#">Escrow Breakdown</a>		
Current Funding	Cash	\$0.00	\$4,655.00	\$4,652.00	\$4,652.00	\$0.00	\$3.00	<a href="#">Cash Breakdown</a>		
<a href="#">Purchase Orders</a>	Purchase Order	\$100,800.00	\$101,575.00	\$571.00	\$87,572.00	\$7,210.00	\$6,793.00	<a href="#">Purchase Order Breakdown</a>		
<b>Net Summary Totals</b>		<b>\$100,800.00</b>	<b>\$106,230.00</b>	<b>\$5,223.00</b>	<b>\$92,224.00</b>	<b>\$7,210.00</b>	<b>\$6,796.00</b>			

Selecting “Credit Card Payment” on TPP Information page

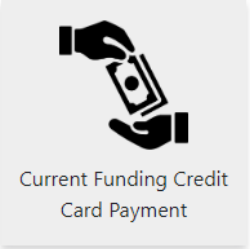
There are two options on the Credit Card Deposit page:

- **Current Funding Credit Card Payment:** Make payment to add funds to your account using credit card
- **Purchase Order Credit Card Payment:** Pay off money owed on an existing purchase order

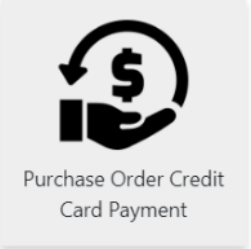
### Credit Card Payment

TPP ID:

TPP Name:



Current Funding Credit Card Payment



Purchase Order Credit Card Payment

#### *Credit Card Payment page*

### Current Funding Credit Card Payment

Click the “Current Funding Credit Card Payment” icon on the Credit Card Payment page. This will launch a Current Funding Credit Card Deposit pop-up where you will enter the Deposit Amount and click the “Proceed” button.

This will redirect you to the payment page and reminds you to print your receipt when complete.

On the Order Summary page, enter your credit card information and billing address. Click the “Pay” button when complete. A receipt will display that you should print for your records. The payment may take up to 24 hours to be reflected in the Partner Portal under Account Summary>Cash Breakdown.

Once the deposit shows up in your account, you can use the amount paid with a credit card to fund a designation. (See “[Manage Designations](#)” below for steps to fund a candidate.)

## Purchase Order Credit Card Payment

Click the “Purchase Order Credit Card Payment” icon on the Credit Card Payment page. This will launch the Purchase Order Credit Card Payment page where purchase orders with pending balances are listed. To pay off (partially or in full) the balance of a PO, enter the dollar amount in the Amount column for the PO you are paying, then click the “Proceed” button.

**Purchase Order Credit Card Payment**

TPP ID:  TPP Name:

**POs with invoice no. and balance amount > 0 are eligible for payment.**  
**Please enter the amount you would like to pay towards the purchase order balance in the amount column**

PO Number	PO Balance	Invoice No	Cycle No	Amount	Description
4000-001	\$ 800.00	482	38	0.00	
4000-003	\$ 100,000.00	484	38	0.00	
Total	\$ 100800.00			\$0.00	

### *Purchase Order Credit Card Payment page*

This will redirect you to the payment page and reminds you to print your receipt when complete.

On the Order Summary page, enter your credit card information and billing address. Click the “Pay” button when complete. A receipt will display that you should print for your records. The payment may take up to 24 hours to be reflected in the Partner Portal Purchase Order Credit Card Payment screen with the adjusted balance amount.

## Manage Designations

Click “TPP Management” in the left navigation, then click the “View TPP Details” icon. On the View TPP Details screen, click the name of the TPP in the “TPP Name” column of the table.

On the “TPP Information” screen in the “Payment Description”>“Funding Type”>“Purchase Orders” row, click the “PO Breakdown” link in the last column of the table. The Purchase Order Breakdown lists the POs to see what amount is available to designate to candidates.



Click the “Manage Designations” button, which takes you to the “Manage Designations” page where you can [add](#) or [remove](#) designations.

**TPP Information**

TPP ID:  TPP Name:   
 Address 1:  Address 2:   
 City:  State:   
 Zip:  Country:

**Account Summary** 
[Credit Card Deposit](#) [Manage Designations](#) [Financial Reports](#)

Payment Description		Balance Totals			Designation Totals			Breakdown
Funding Type	Payment Type	Account Receivable Balance	Funded Amount	Refundable Balance	Available Funding Amount	Promised Funding	Fully Distributed Total	Details
Escrow	Cash	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	<a href="#">Escrow Breakdown</a>
Current Funding	Cash	\$0.00	\$4,655.00	\$4,652.00	\$4,652.00	\$0.00	\$3.00	<a href="#">Cash Breakdown</a>
<a href="#">Purchase Orders</a>	Purchase Order	\$100,800.00	\$101,575.00	\$571.00	\$87,847.00	\$6,935.00	\$6,793.00	<a href="#">PO Breakdown</a>
<b>Net Summary Totals</b>		<b>\$100,800.00</b>	<b>\$106,230.00</b>	<b>\$5,223.00</b>	<b>\$92,499.00</b>	<b>\$6,935.00</b>	<b>\$6,796.00</b>	


Selecting “Manage Designations” on TPP Information page


### Add New Designations: adding designation for new candidate


Click the “Add New Designation” icon on the Manage Designations page.


**Manage Designations**


TPP ID:  TPP Name:


  
 Add New Designation

  
 Remove Existing Designations

  
 Download All Designations Report

  
 Download Current School Year Designation Report

  
 Removed Designation Report

  
 Detailed Designation Report

Selecting “Add New Designation” icon on Manage Designations page

On the Add New Designation Validation Results screen, select funding source (see [“Payment Description”](#) above for more information on each source):

- Escrow

The screenshot shows a web form for adding a new designation. At the top, there are two input fields: 'TPP ID: 5593' and 'TPP Name: ABCD'. Below these is the section 'Select Funding Source' with three radio button options: 'Escrow' (which is selected), 'Current Funding', and 'Purchase Order'. Underneath is a dropdown menu labeled 'Select Escrow:' with 'Escrow' selected. At the bottom of the form, there are two more input fields: 'Total Amount: \$10,000.00' and 'Available Balance: \$9,414.00'. A blue button labeled 'Apply Designation(s)' is located at the very bottom.

- Current Funding
  - Select the check/wire number that you want to draw funds from for this designation. Then follow the steps outlined.

The screenshot shows the same web form as above, but with 'Current Funding' selected. The 'Select Current Funding:' dropdown menu now shows the value '2143'. The 'Total Amount' is \$2,000.00 and the 'Available Balance' is \$1,899.00. The 'Apply Designation(s)' button is still present at the bottom.

- Purchase Order
  - Select the PO you want to draw funds from for this designation (the total amount and available balance of the selected PO will appear below).

Once the source is selected, click the “Apply Designations” button.

On the “Add New Designation Validation Results” page, you have two options:

1. Click “Add New Row” and populate the Candidate ID. The First and Last Names will automatically populate. Then enter the amounts you want to designate for the components that funding was requested for (registration, C1, C2, C3, C4, etc.) and click the “Submit” button.

	Third Party Payer ID	Candidate ID	First Name	Last Name	Registration (\$75)	C1 (\$475)	C2 (\$475)
<input type="checkbox"/>	5593	04066400	Cand0014	dev		475	

- The full dollar amounts are provided in the system for each funding option, but the full dollar amounts do NOT have to be entered.
- If there is a validation result error, the row will be highlighted in pink and an error message will appear in the “Validation Result” and a designation error report will automatically download to your download folder. Fix the data entry error and proceed with your submission.

2. Click “Download Designation Template.” When you populate the necessary information, save and upload it by going back to the “Add New Designation” page and clicking “Upload Designation File,” which will allow you to select the completed template on your computer and add it to the uploader by clicking “Upload.”

- **The file has to be error free in order for all designations to be applied.**  
If there is a validation result error, a designation error report will automatically download to your download folder and show any errors in your uploaded file. Go back to your offline completed template, make the necessary changes, and reupload the revised template.

The designated funding amounts will be reflected in the TPP Purchase Order Breakdown and the Designations Reports in the Partner Portal (see [“Reports”](#) below) and in the candidate’s account.

## Remove Existing Designations: removing designation for an existing candidate

Click the “Remove Existing Designations” icon on the Manage Designations page. On the “Remove Existing Designations” page, candidates who have been designated funding but have not yet used it are listed.

### Remove Existing Designations

TPP ID:  TPP Name:

<input type="checkbox"/>	Candidate ID	First Name	Last Name	Component	Designation Date	Designation Amount	Status	Funding Source	School Year
<input type="checkbox"/>	04066563	Hrithik	Test	C2	05/20/2024	\$20.00	Approved	Escrow-3	2023-2024
<input type="checkbox"/>	04066563	Hrithik	Test	C1	05/20/2024	\$150.00	Approved	Escrow-3	2023-2024
<input type="checkbox"/>	04042935	CTTTester13	Tester13	C3	06/06/2024	\$475.00	Approved	Cash-2043	2024-2025
<input type="checkbox"/>	04042935	CTTTester13	Tester13	C4	06/05/2024	\$96.00	Approved	PO-101	2024-2025
<input type="checkbox"/>	04066563	Hrithik	Test	C4 Retake	05/20/2024	\$1.00	Approved	Cash-2143	2024-2025
<input type="checkbox"/>	04066563	Hrithik	Test	C4 Retake	05/20/2024	\$1.00	Approved	Escrow-3	2024-2025
<input type="checkbox"/>	04066563	Hrithik	Test	C4 Retake	05/20/2024	\$1.00	Approved	PO-33	2024-2025
<input type="checkbox"/>	04066529	Cand0041	Test	Annual Registration	05/20/2024	\$1.00	Approved	PO-33	2024-2025
<input type="checkbox"/>	04066529	Cand0041	Test	Annual Registration	05/20/2024	\$2.00	Approved	PO-101	2024-2025
<input type="checkbox"/>	04066529	Cand0041	Test	Annual Registration	05/20/2024	\$5.00	Approved	PO-200	2024-2025

Showing 1 to 10 of 34 rows  rows per page < 1 2 3 4 >

[Remove Designation\(s\)](#)

### Remove Existing Designations page

To remove a candidate’s funding, check the box to the left of the row(s) for the component(s) that you would like to remove funding for and click “Remove Designation(s).”

If funding needs to be reallocated to a candidate, repeat the steps in [“Add New Designations”](#) above.

## Reports

### Designation Reports

Click “TPP Management” in the left navigation, then click the “View TPP Details” icon. On the View TPP Details screen, click the name of the TPP in the “TPP Name” column of the table.

On the “TPP Information” screen, click the “Manage Designations” button, which includes the following options:

The screenshot displays the 'Manage Designations' interface. At the top, there are two search filters: 'TPP ID:' with the value '4000' and 'TPP Name:' with the value 'Academy School District 20'. Below the filters, there are six icons arranged in two rows. The first row contains: 'Add New Designation Validation Results' (hands holding money), 'Remove Existing Designations' (circular arrow with dollar sign), 'Download All Designations Report' (report icon with dollar sign, highlighted with a red box), and 'Download Current School Year Designation Report' (calendar icon with clock, highlighted with a red box). The second row contains: 'Removed Designation Report' (report icon with dollar sign), and 'Detailed Designation Report' (report icon with dollar sign, highlighted with a red box).

*Selecting “Download All Designations Report” icon, “Download Current School Year Designation Report” icon, or “Detailed Designation Report” icon on Manage Designations page*

- “Download All Designations Report” icon: Access report for all school years.
- “Download Current School Year Designation Report” icon: Access report for current school year.

These two reports list the candidates who have been designated funds (either for all years or for the current year, depending on which report was downloaded) and includes the following:

- candidate ID and name
- component name
- funding source
- designation amount
- designation unused and used amounts

- “Detailed Designations Report” icon: Access report with demographic information about each candidate:
  - candidate ID, name, email
  - ethnicity/gender [if candidate released]
  - state licensure number
  - account information
  - employment state, district, school
  - certification application component details)

For all these reports, you can filter by any of the variables listed above or download the entire reports.

## Financial Reporting

The Partner Portal’s financial reports will help you understand and reconcile the activity in your account.

Click “TPP Management” in the left navigation, then click the “View TPP Details” icon. On the View TPP Details screen, click the name of the TPP in the “TPP Name” column in the table.

The TPP Information screen displays the Account Summary table. At the top right of the Account Summary, click the “Financial Reports” button.

**TPP Information**

TPP ID: <input type="text" value="4000"/>	TPP Name: <input type="text" value="Academy School District 20"/>
Address 1: <input type="text" value="abc road"/>	Address 2: <input type="text" value="city"/>
City: <input type="text" value="kolkata"/>	State: <input type="text" value="AL"/>
Zip: <input type="text" value="99501"/>	Country: <input type="text" value="United States"/>

**Account Summary** 
[Credit Card Deposit](#)
[Manage Designations](#)
[Financial Reports](#)

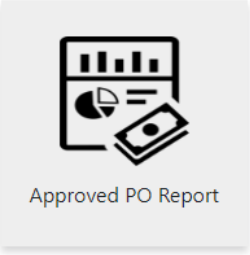
Payment Description		Balance Totals			Designation Totals			Breakdown
Funding Type	Payment Type	Account Receivable Balance	Funded Amount	Refundable Balance	Available Funding Amount	Promised Funding	Fully Distributed Total	Details
Escrow	Cash	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	<a href="#">Escrow Breakdown</a>
Current Funding	Cash	\$0.00	\$4,655.00	\$4,652.00	\$4,652.00	\$0.00	\$3.00	<a href="#">Cash Breakdown</a>
<a href="#">Purchase Orders</a>	Purchase Order	\$100,800.00	\$101,575.00	\$571.00	\$87,847.00	\$6,935.00	\$6,793.00	<a href="#">PO Breakdown</a>
<b>Net Summary Totals</b>		<b>\$100,800.00</b>	<b>\$106,230.00</b>	<b>\$5,223.00</b>	<b>\$92,499.00</b>	<b>\$6,935.00</b>	<b>\$6,796.00</b>	

Selecting “Financial Reports” on TPP Information page

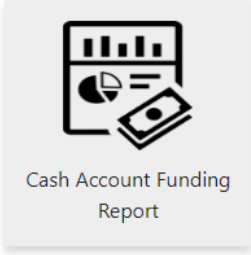
This will navigate you to the Financial Report page with these options:

### Financial Report

TPP ID:  TPP Name:



Approved PO Report



Cash Account Funding Report

*Financial Report page with Approved PO Report and Cash Account Funding Report options*

- **Approved PO Report:** Shows approved purchase orders individually.
  - This report lists TPP ID, TPP Name, School Year, PO Number, Invoice Number, Requested Date, Approved Date, PO Amount, Paid Amount.
  - You can download data, apply filter by any of the above headings, or clear filter.
- **Cash Account Funding Report:** Shows any payment that has been received.
  - This report lists TPP ID, TPP Name, School Year, Cash Funding Name (escrow, check, wire transfer, desktop deposit, TPP reversal, credit card), Payment Number, Batch Number, Transaction Amount.
  - You can download data, apply filter by any of the above headings, or clear filter.

## Contact Us

For questions regarding setting up funding designations, 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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