National Board Certification Partner Portal User Guide: Standard Reporting

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:

- Using reports
- Candidate Information Reports
  - Detailed View
  - Summary View
- Common Report Filters
- Glossary of Report Fields

To get started using reports, visit the Partner Portal Sign In page to sign in to your account.

Using Reports

The Reports feature allows partners to get insights into their candidates. In this guide, the term "candidate" is used to denote a person that exists in the National Board candidate registration system. The candidates you have access to via the Partner Portal is determined by
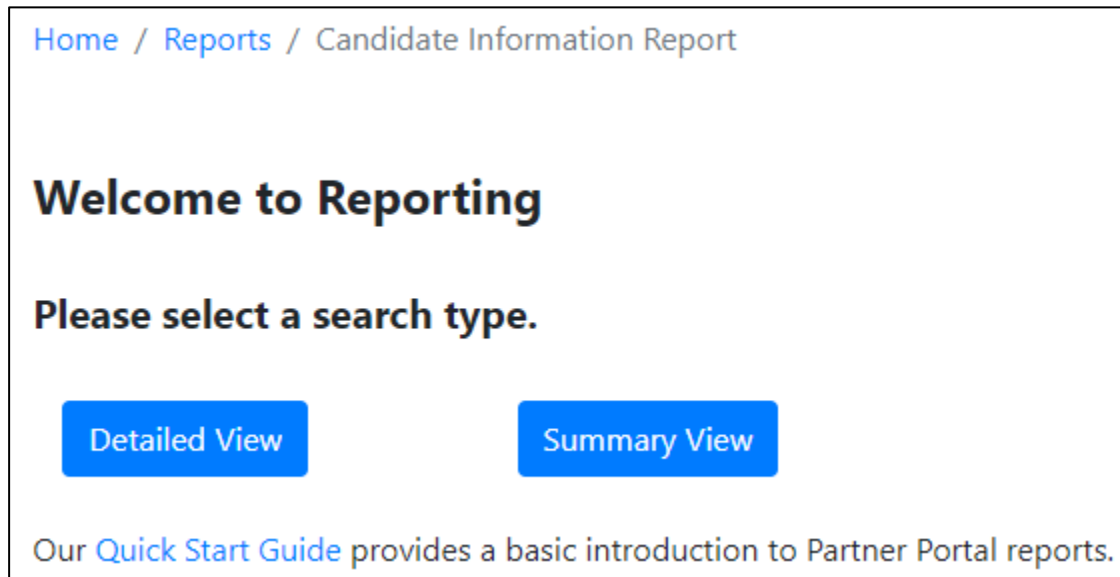
- your permissions and

- whether a candidate has elected to release their information to you.

A candidate is only visible in the system if they have elected to release their information. If you cannot see a certain candidate or their demographic information, please contact that candidate and ask them to update the information release questions in their National Board account in My Profile. Report data is automatically updated based on candidate activity within their account.

Candidate Information Reports

On the Reports tab of the Partner Portal, you can create reports, which can be downloaded as CSV files, to fit your organization's needs.

In the left navigation, click "Reports" and then click the "Candidate Information Reports" icon. There are two options available for reporting in the Candidate Information Reports section: Detailed View and Summary View.

Home / Reports / Candidate Information Report

Welcome to Reporting

Please select a search type.

[Detailed View]   [Summary View]

Our Quick Start Guide provides a basic introduction to Partner Portal reports.

Welcome to Reporting page

Detailed View

This report style defaults to displaying no candidates.

Detailed View page with no filter applied

After applying a filter, it will display the complete history for a candidate's most recent National Board application, presenting a comprehensive view of all component attempts, with each component listed on a single row per candidate.

Detailed View page with filter applied

1. Filter the data by defining the criteria from the drop-down menu. Learn more about the available fields in the Glossary at the end of this guide.

   a. Use the Filter to refine your search. Add as many fields as needed. Use the Delete button as necessary to remove a Filter.

      i. **Operator** is defined as follows:

         1. Equal to: returns all candidates that are an exact match to the value

         2. Not equal to: returns all candidates that are different from the value

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3. Contains: returns all candidates that contain the value

4. Doesn't contain: returns all candidates that do not contain the value

5. Starts with: returns all candidates that match the start of the value

    ii. **Value** is the text that you want to search for (e.g., candidate ID, state).

b. Select a Filter match criteria.

    i. **Match All:** all conditions must be true to in order to find a match (e.g., selecting Name [Smith] and State [MD] will result in all candidates named Smith in MD)

    ii. **Match At Least One:** if at least one condition is true there is a match (e.g., selecting Name [Smith], State [MD], all Smiths and all MD candidates will display)

c. The default fields for every report are Candidate ID, first and last name, email address, ethnicity, and gender, but add or remove columns to your preference using "Add/Remove Columns." Select as many fields as needed.

2. Also use "Add/Remove Columns" dropdown to select columns you want to see/hide.
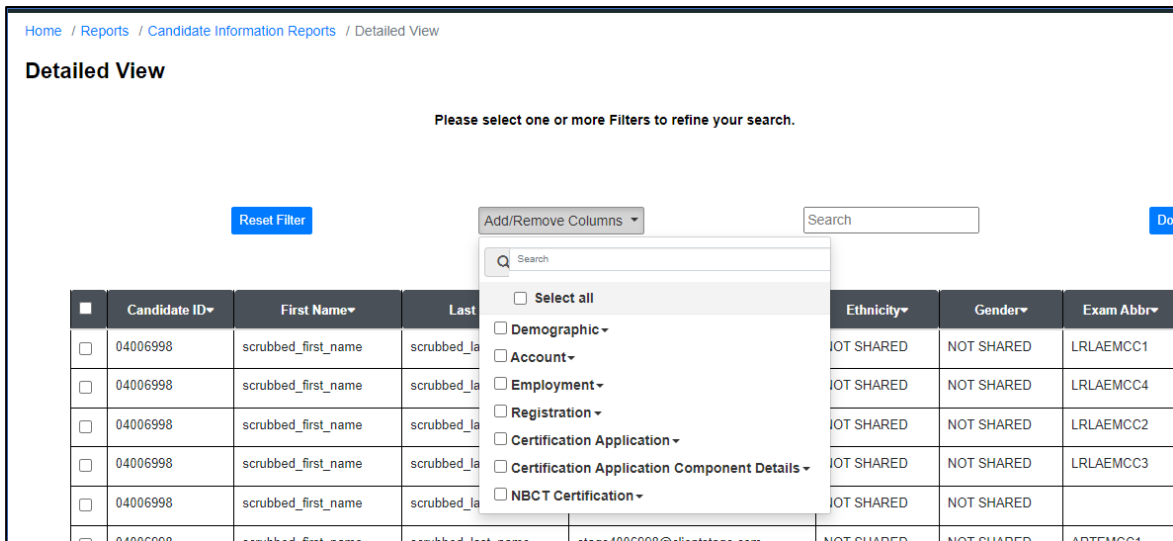
3. Once customized, click "Apply Filter" to generate the report.

4. If the filter results in multiple pages, use the navigation at the bottom left of the screen to go to previous/next pages.

5. Increase/decrease the number of rows displayed at the bottom right of the screen.

6. To export your report, click the "Download Data" button. All fields, regardless of what is selected, will export to an Excel spreadsheet.

Summary View

This report style defaults to displaying all candidates that you have access to, one row per candidate.

Note: The main search page for Summary View looks very similar to Detailed View except it defaults to displaying all of the candidates that you have access to instead of starting from scratch.

Summary View default page

Filter using the same process as in Detailed View:

1. To customize your report, click "Apply Filter."

2. Once customized, click "Apply Filter."

3. To view school-year–specific information about a candidate or candidates, click "View Progress by School Year."

4. Select a school year to filter on from the drop-down. Then click "View Progress by School Year."

5. At any point in your search refinement, you may export your results using the "Download Data" button or start a new search using "Reset."

Common Report Filters in Summary View

Refer to the table below for commonly used filters in Summary View. Use the filters listed in the right column to yield the desired results in the left column

I want to access...	Summary View Filter (replace underlined text as needed)
All NBCTs (anyone with a certification)	Credential Status is equal to True and False
All NBCTs with an active certification	Credential Status is equal to True
All NBCTs with an expired certification	Credential Status is equal to False
NBCTs certified in a particular year	Credential Issue Date contains 2022
NBCTs maintained in a particular year	Last Renewed Year contains 2023
NBCTs expiring in a particular year	Credential Expire Date contains 2022
People who are in the 3rd year of candidacy of this year	Application Initial End School Year is equal to 2024-2025
People who are in 5th year of candidacy of this year	Application End School Year is equal to 2024-2025
Anyone who has paid the registration fee this school year	Active Registration is equal to Y
Only people who have purchased components this year	Component Purchase Status is equal to Y School Year Progress filter is equal to 2023-2024
Anyone who will be getting scores this school year that has either uploaded a portfolio or attended C1 appointment. (NOTE: Scores are given for any purchased component.)	Component Purchase Status is equal to Y Test Component Action Completed is equal to Y School Year Progress filter is equal to 2023-2024
Anyone who will be getting a decision this school year	Component Purchase Status is equal to Y Total Initial Components Taken is equal to 4 School Year Progress filter is equal to 2023-2024

Glossary of Report Fields

Demographic

Field	Description
Candidate ID	The Candidate ID of the candidate*
First Name	Candidate's first name
Last Name	Candidate's last name
Email	Candidate's email
Ethnicity	Candidate's ethnicity
Gender	Candidate's gender
State Licensure Number	Candidate's Teacher Licensure number (as provided by candidate)

*The term "candidate" is used to denote a person who exists in our candidate registration system.

A candidate is only visible if they have elected to release their information. If you cannot see a certain candidate or their demographic information, please contact that candidate and ask them to update the information release questions in their National Board account in My Profile.

Account

Field	Description
Account Create Date	Date the candidate created an account
Account Create Cycle	The school year that the account was created based on Create Date
Account Status	Clarus Account Status (active/inactive)

Employment

Field	Description
Employment State	State in which the candidate is employed
Employment District	District in which the candidate is employed
Employment School	School in which the candidate is employed

Registration—Information about whether a candidate paid the registration fee

Field	Description
Active Registration	Does the candidate have an active registration? (Y/N)
Registration School Year	When they paid the registration fee

Certification Application (These fields are blank if no active credential applications)—Information about the latest application for Board certification

Field	Description
Certificate Name	Certificate Candidate is actively pursuing
Certificate Specialty	Specialty within the certificate area
Sub-Specialty Area	Sub-Specialty within the specialty
Application Status	Credential Application Status
Application Start School Year	Start Cycle for the credential app
Application Initial End School Year	This will be the school year for the 3rd year of candidacy + by which the candidate must complete the 3-year requirement. See Guide to National Board certification for more about this requirement.
Application End School Year	This will be the school year for the 5th year of candidacy + by which the candidate must complete the 5-year requirement. See Guide to National Board certification for more about this requirement.
Total Initial Components Taken	Count of the C1–C4 initial components taken for the credential app.
Total Initial Components Non-Taken	Count of the C1–C4 initial components not yet attempted for the credential app.

Certification Application Component Details—Information about the components a candidate is pursuing

Field	Description
Exam Abbr	Name of the component (e.g., "GENMCC1" for Component 1, Middle Childhood Generalist certificate)
Component Registration Year	The school year the component was selected
Component Purchase Status	Was this component purchased? (Y/N)
Component Expect TPP Funding	For the component, did the candidate select that they are expecting funding? (Y/N)
Component TPP Funding Available	Unused TPP funding for C1? (Y/N/P [Partial])
Component TPP Funding Utilized	For the component, was TPP funding used? (Y/N/P)
Component Action Completed	Did they sit for C1 or did they upload a component? (Y/N)

NBCT Certification (If awarded, otherwise blank)—Information about the NBCT's certification

Field	Description
Certification Certificate Name	Certificate candidate is pursuing
Certification Certificate Specialty	Specialty within the certificate area
Credential Status	Is this certification active (True) or expired (False)
Last Renewed Year	Last time (year) the certification was renewed/maintained
Certification Sub-Specialty Area	Sub-Specialty within the specialty
Certification Issue Date	Certification original issue date
Certification Renewal Start Date	Date Certification was last renewed
Certification Expire Date	Current Certification expiration date
Certification Renewal End Date	Date the Certification renewal ends (may be after expire date if extension received)

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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