



NBSTSA
Exam Offering Process
School User Guide

Table of Contents

CHANGE LOG	3
INTRODUCTION	4
1. TRAINING VIDEOS.....	4
2. ACCESS LEARNINGBUILDER.....	4
3. EXAM OFFERING REQUEST	4
4. STUDENT IMPORT PROCESS	9
4.1 Upload Students and Applications	9
5. BULK PAYMENT PROCESS	13
6. RECORD GRADUATION DETAILS.....	15
7. SCHOOL OFFERING QUEUE TIPS	16
8. REPORTS	18
8.1 School Score Report.....	19

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
7/6/2023	Added	
7/7/2023	Changed Exam Offering example	The offering titles follow a certain convention that needs to be displayed in the examples.

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>

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

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

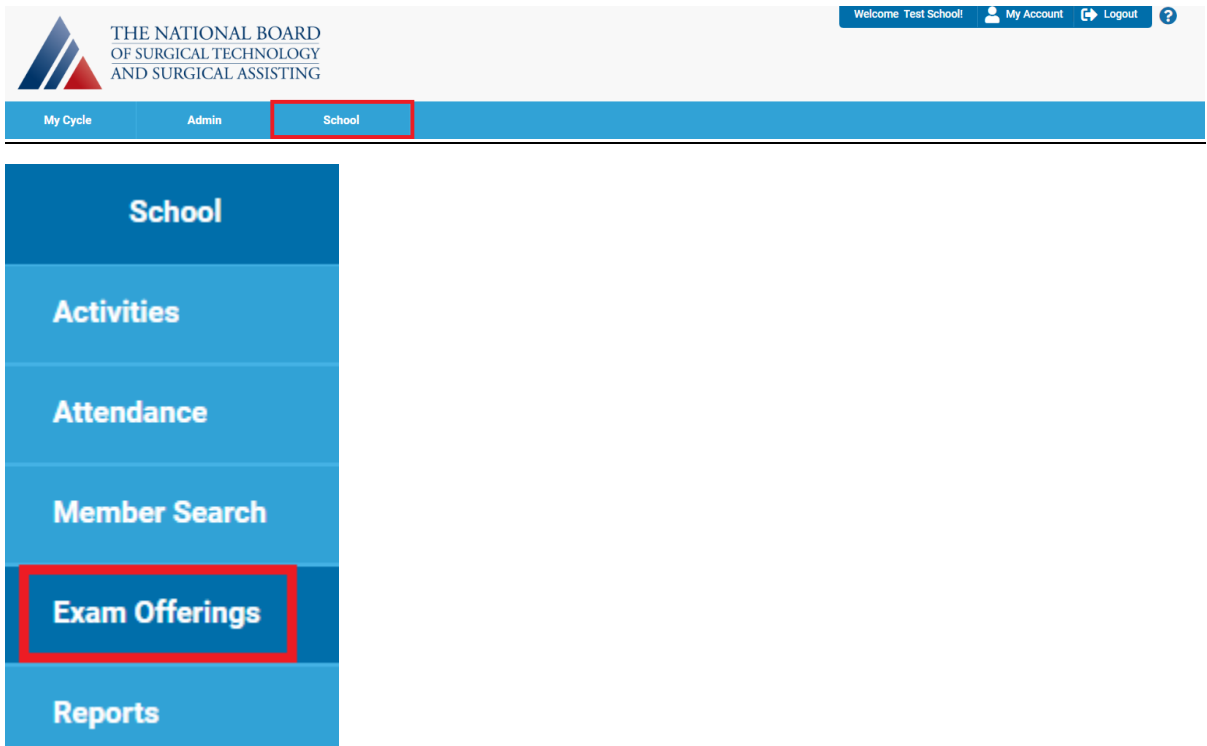
Schools can submit a request with all necessary details to PSI so that they can hold an examination at their desired location. The below details are included in a request:

- 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

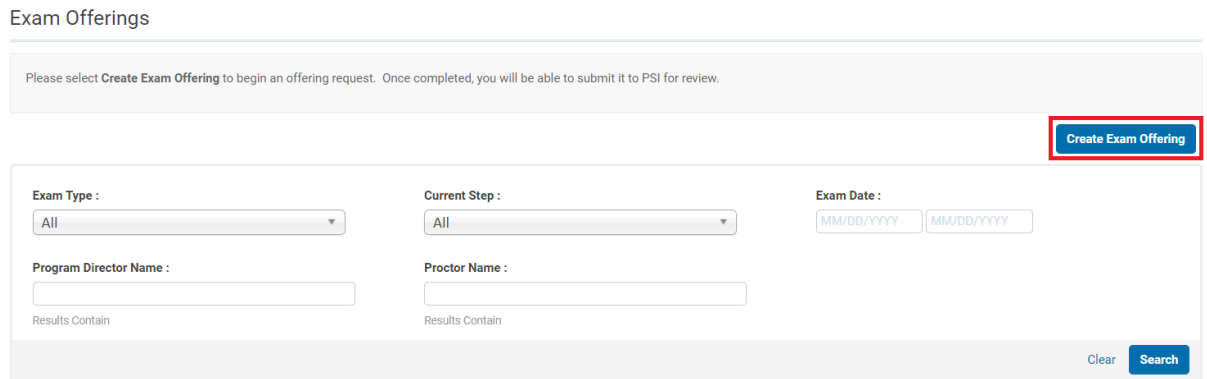
- Proctor Phone
- Proctor Email
- Alternate Contact Name
- Alternate Phone
- Alternate Email

Exam Request Steps

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



2. Select Create Exam Offering.



- 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](#)

- 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*:

Owner*: Test School

[Cancel](#)
[Continue](#)

- The exam request is organized into three sections for you to complete. All fields denoted with a * are required fields.
 - All requests must be at least 45 days in the future. In case you choose an invalid date, an error message will appear, and you won't be able to proceed.
 - Once all required details are entered you may select Submit to send your request to PSI.
 - 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.

Colorado College 12/18/23: Provide Exam Offering Details: School Details

School Name: Test School

City*: Colorado Springs

State*: CO

Program Director Name*: Ozy

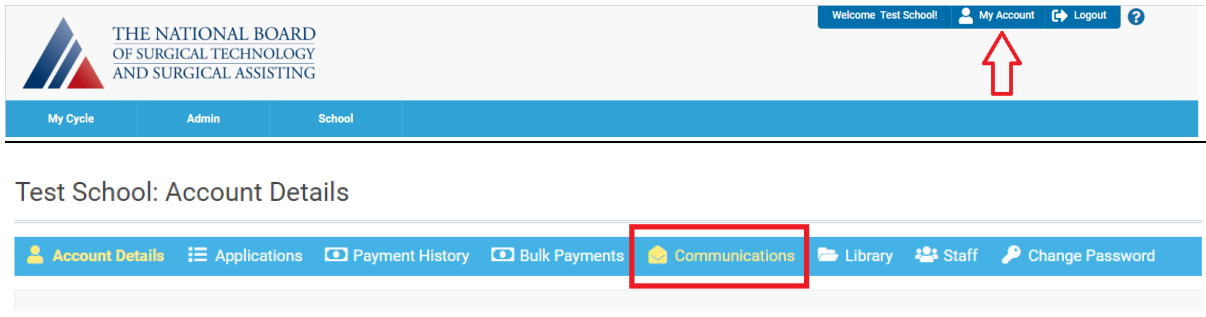
Program Director Phone*: 7195555555

Program Director Email*: test@heuristics.net

< Previous Next >

Finish Later Cancel Submit

- 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.

- 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.

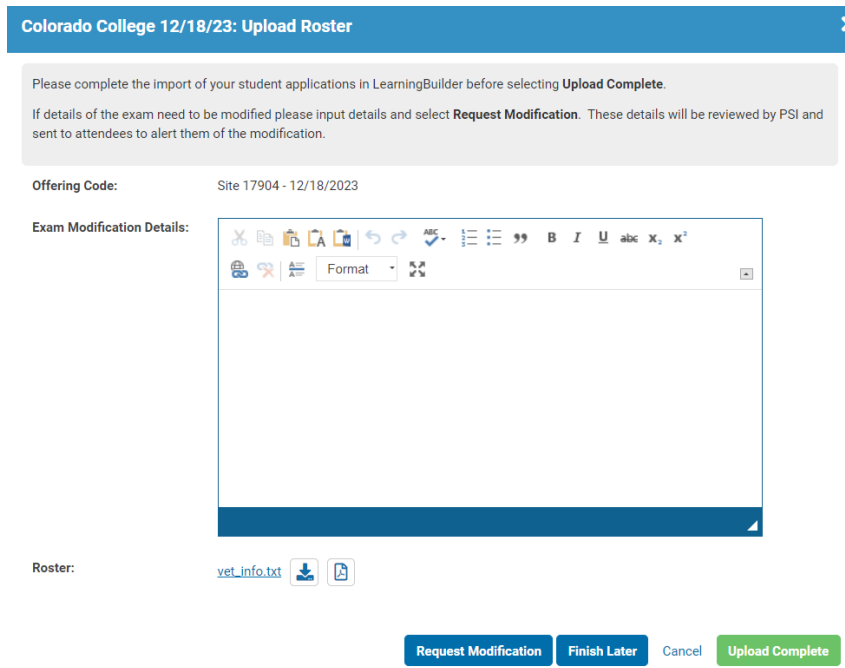
Upload Roster -- not CSV file

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.

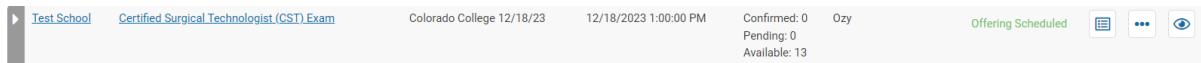
- Return to *Exam Offering* under the School section, and search for your Offering. It is helpful to use the Current Step filter to narrow the results to the offerings on the Upload Roster step.

- Find the offering, and push Submit Roster

- 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.

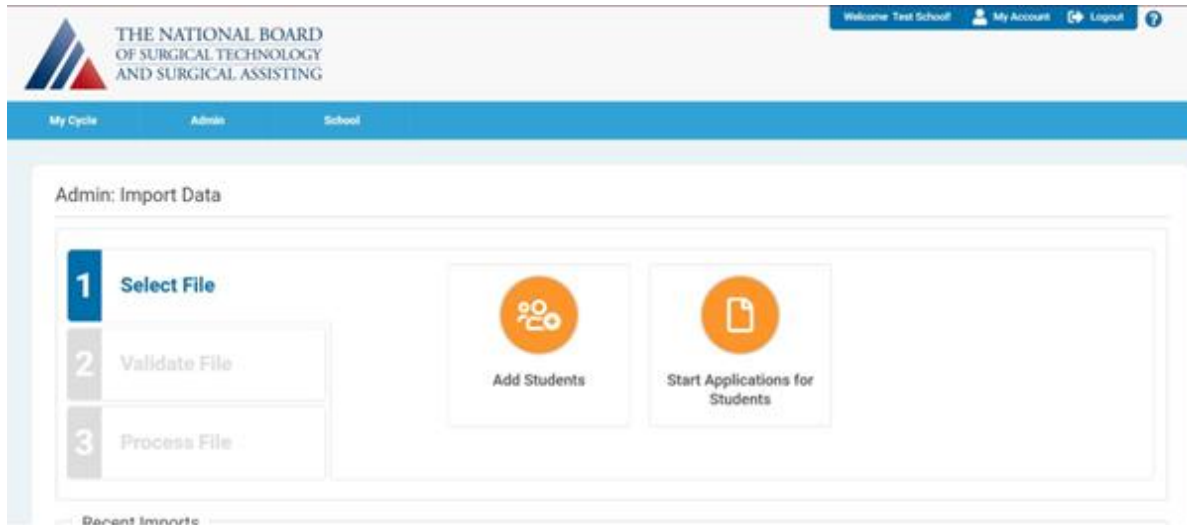


4. STUDENT IMPORT PROCESS

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 Upload Students and applications

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 add 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. Your students must then log in to LearningBuilder to complete and submit their applications.
 - i. These imports should be done together unless you do not use Offerings.
3. When importing data, 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.

:Uniqueid	:RoleName	:Email	First Name	Last Name	WBT - Rok	Offering Code - Role	School Payment Flag
100000	Practitioner	ozythecutest@colorado.edu	Ozy	Tester	Yes	Site 0000 - 12/18/2000	Yes
100001	Practitioner	gobroncos@colorado.edu	Johnny	Elway	Yes	Site 0000 - 12/18/2000	Yes
100002	Practitioner	gonuggets@colorado.edu	Nikola	Jokic	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
 - 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.

- c. Additional instructions are provided in each import template for reference.

Add Students Download CSV Template

STEP 1:

To initiate the Exam Offering process, start by downloading the template. Download a new template with each upload, or you may encounter errors.

Next, add your students to LearningBuilder and advise them against creating their accounts.

Please do not make changes within 72 hours of the offering date.

Choose File | colorado_test.csv

Upload File

- 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	
The valid rows will...		
Insert 1 new Member and corresponding Member Role		
Update 2 existing Member Roles		



Processing Completed Successfully



3 records processed successfully

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

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.

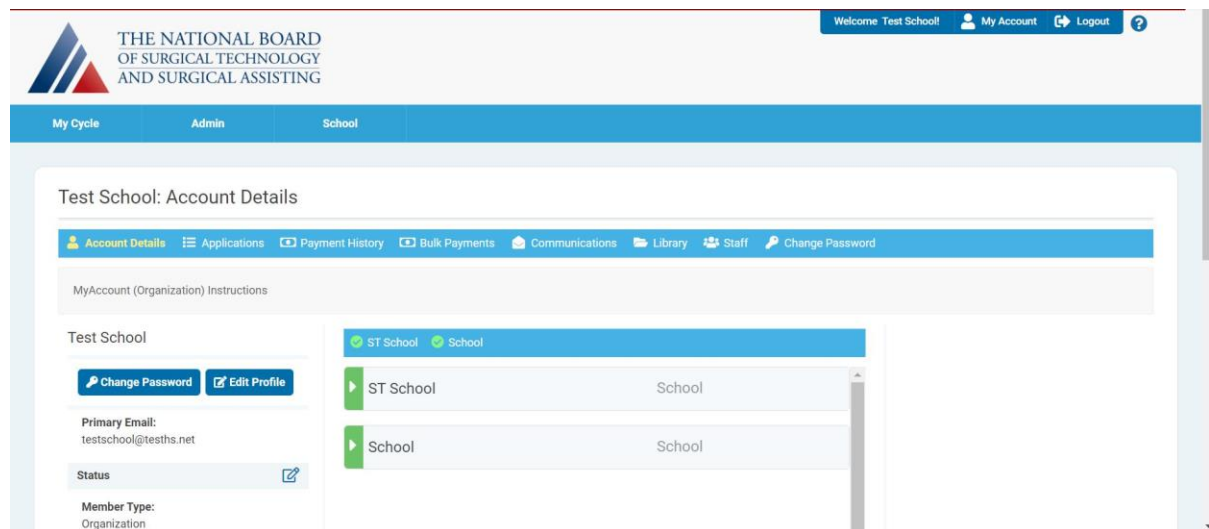
You have the option to pay for a single student or a group of student applications at once with the bulk payment feature.

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.



This page allows staff members to make bulk payments on behalf of their parent Organization(s). For more details, see [the feature documentation](#)

Filters

Keyword:

Showing Records 1 to 1 of 1 0 Selected Show 20 entries per page

<input type="checkbox"/>	Payment For ↑	Payment	Payee	Amount	Current Status
<input type="checkbox"/>	Application for Initial CST Certification test 2 (r4obaVJFn020Kn3maYStqg:)	Application Fee Application for Initial CST Certification Fee Member Fee plus \$50 Rush Fee	Baldwin Combs bcombs@heuristics.net	\$240.00	Pending School Application Payment

0 selected, \$0.00 total

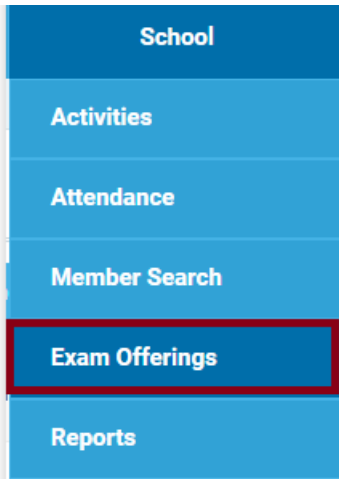
- 3. The bulk payment area will provide a list of all applications that are on the school payment step. You may select the check box on the far left to select individual or multiple applications for payment.
 - a. When all desired applications are selected please trigger Make Payment button in the bottom 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.

Score Release Steps

1. Go to your Exam Offering queue.



Exam Offerings

Please select **Create Exam Offering** to begin an offering request. Once completed, you will be able to submit it to PSI for review.

[Create Exam Offering](#)

Exam Type: Current Step: Exam Date:

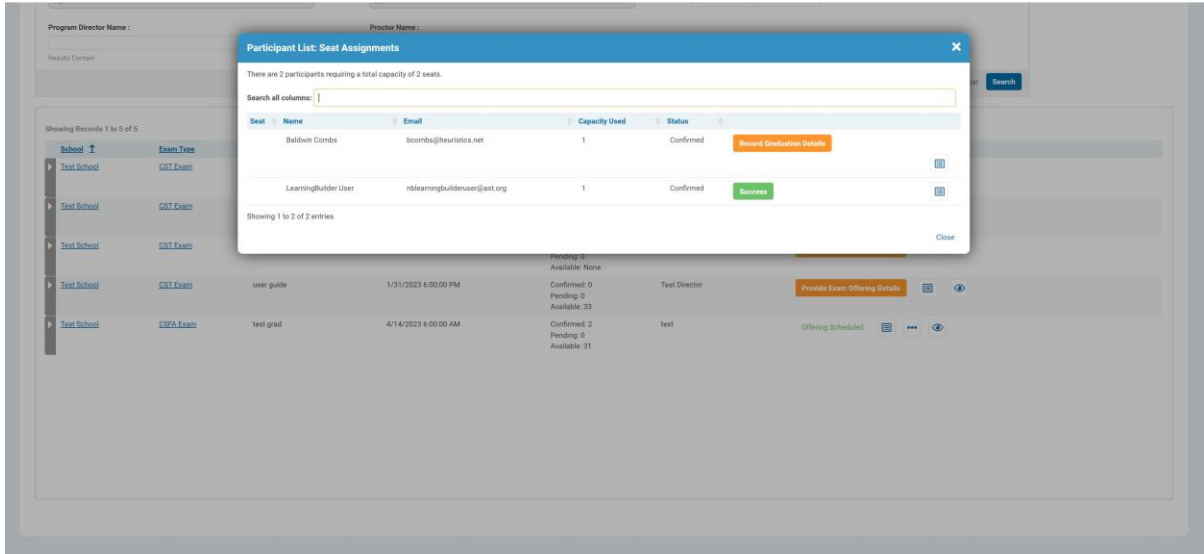
Program Director Name: Proctor Name:

Results Contain Results Contain

Showing Records 1 to 4 of 4

School	Exam Type	Offering Title	Exam Date / Time	Capacity	Program Director	
Test School	GST Exam	Test Exam Offering	10/26/2022 4:00:00 PM	Confirmed: 0 Pending: 0 Available: 10	Test Director	Offering Scheduled
Test School	GST Exam	test	1/26/2023 4:00:00 PM	Confirmed: 0 Pending: 0 Available: 44	Test Director	Offering Scheduled
Test School	GST Exam	Test		Confirmed: 0 Pending: 0 Available: None		Provide Exam Offering Details
Test School	GST Exam	user guide	1/31/2023 6:00:00 PM	Confirmed: 0 Pending: 0 Available: 33	Test Director	Provide Exam Offering Details

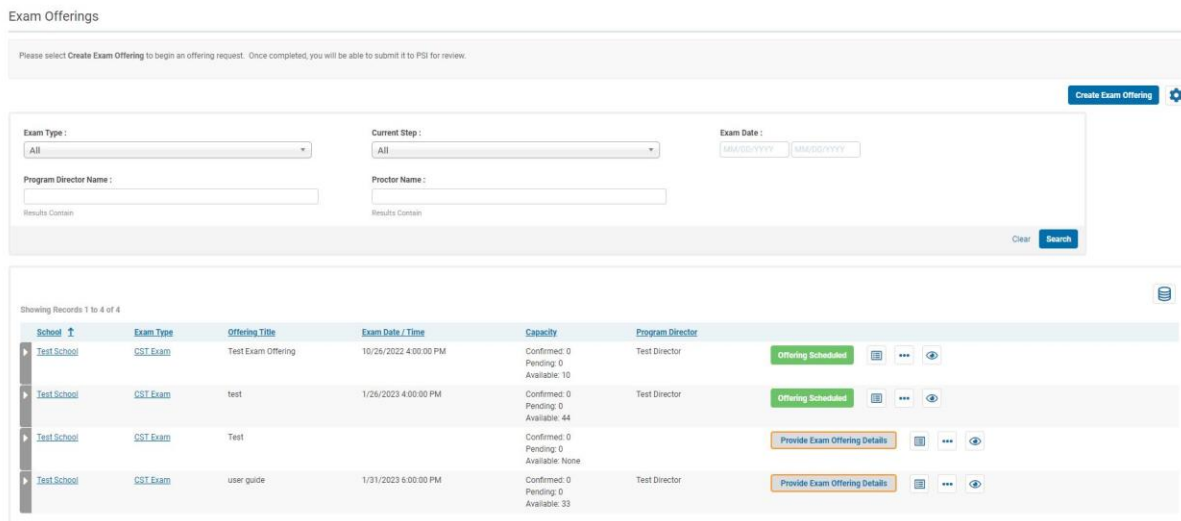
2. Select the eye icon to see the applications associated with your offering.





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.

Participant List: Seat Assignments					
There are 2 participants requiring a total capacity of 2 seats.					
Search all columns: <input type="text"/>					
Seat	Name	Email	Capacity Used	Status	
	Baldwin Combs	bcombs@heuristics.net	1	Confirmed	Await Exam Release → 
	Baldwin Combs	bcombs@heuristics.net	1	Confirmed	Pending School Payment → 
Showing 1 to 2 of 2 entries					
Close					

Removing a student from a roster and/or Refund options

Please contact the WBT department by email as soon as you are aware a student will not be graduating when expected or will be unable to sit for the CST examination when scheduled. NBSTSA requires a minimum of three (3) business days to successfully remove a student from a scheduled WBT. NBSTSA suggests additional notification by telephone to ensure the email notification was received.

The NBSTSA must be notified at least three (3) business days before an examination if a student will be unable to test. The program director must notify the NBSTSA by email to remove a candidate from a roster. The email needs to include the name of the candidate being removed, the date of the exam, and the reason the candidate is unable to test. If a refund is needed, the request can be made in the same email. Documentation may be required to remove the candidate. Inability to notify the NBSTSA three (3) business days prior to the examination date will result in forfeiture of total testing fees. Payments are refunded in the name they were originally received.

A WBT candidate who wishes to cancel their examination appointment may do so (only if unforeseen circumstances have occurred) at least three (3) business days prior to the scheduled session through their program director. If the candidate is being removed for any reason other than a delay in graduation or drop from the program, the NBSTSA must approve the removal of the candidate from the exam roster.

If an examination appointment is cancelled the candidate will not be allowed to test until after their graduation has occurred and graduation proof is received unless their graduation date was delayed. Those candidates who were removed for reasons other than a delay in graduation will be required to schedule their examination through a PSI approved CBT center.

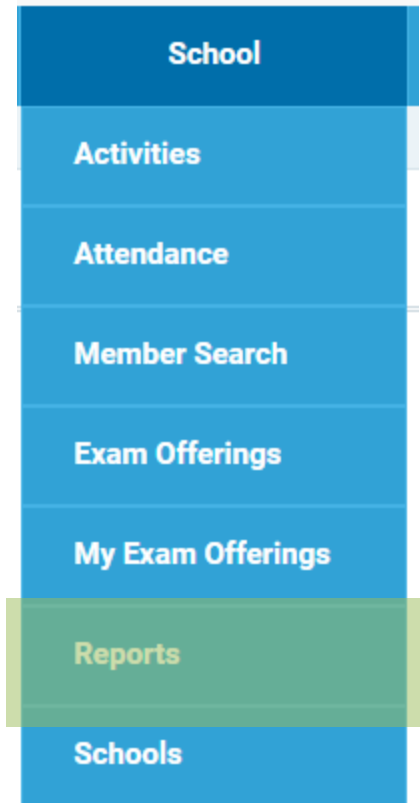
NBSTSA may issue a refund (minus examination processing fee if applicable) to WBT examinees in the instance that the candidate is not expected to graduate from the surgical technology program:

- Request for refund must be submitted by email or mail.
- Refunds will not be issued for candidates that were not removed from the scheduled examination date.
- Refund will not occur until after the scheduled exam date has occurred.


IMPORTANT: Failure to show for a scheduled examination appointment will result in forfeiture of total paid testing fees and necessitate reapplying for the examination and re-submission of testing fees.

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](#)



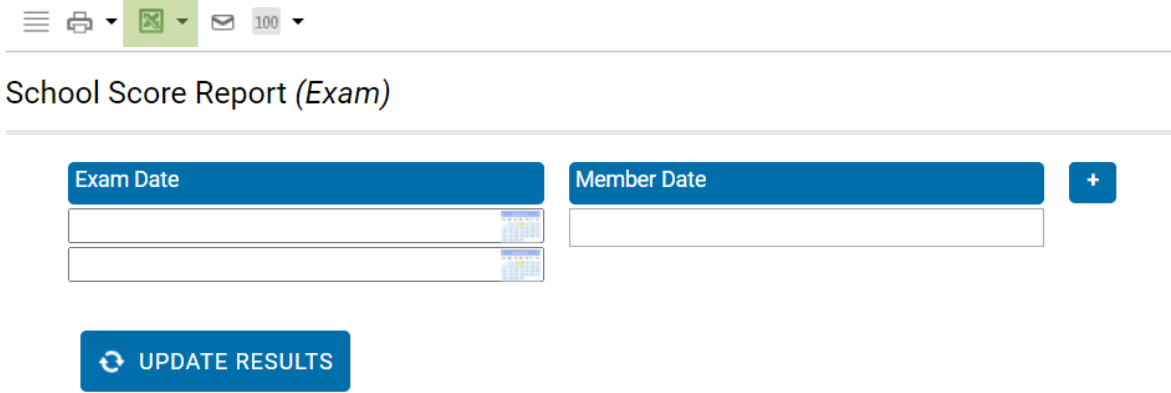
This report will show all pregrad scores associated to a school in LearningBuilder. It will display the score details, exam date, and if this was their first attempt. First attempt will be indicated with a Y and the additional attempts with a N.

Screen shot of the School Score Report selection

Uniqueld	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.