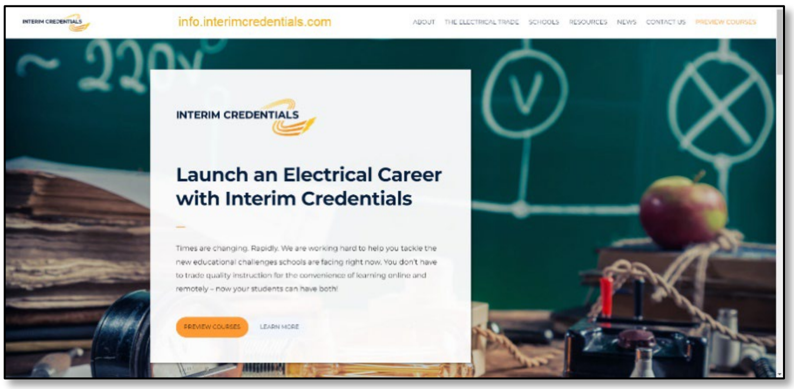
INTERIM CREDENTIALS

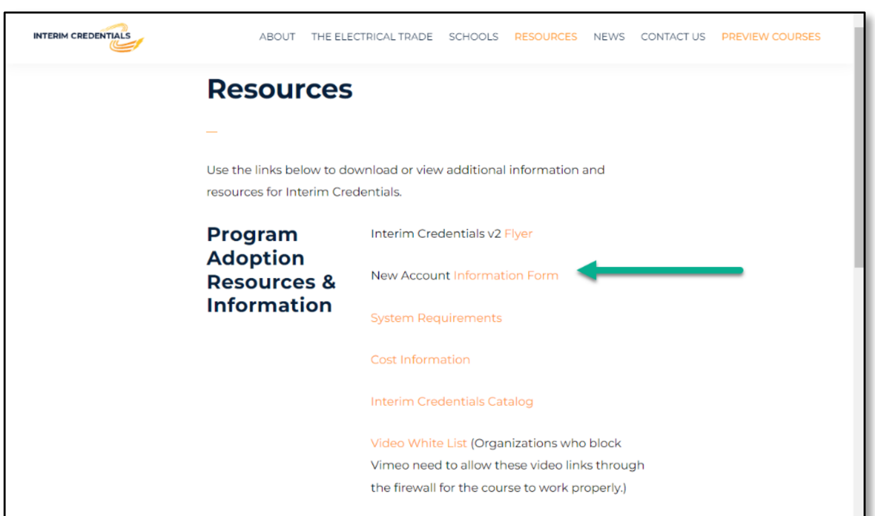
ACCOUNT SET-UP GUIDE

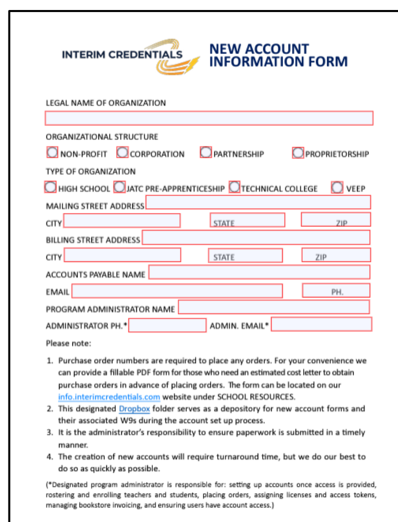
The following information is provided as guidance for organizations who are ready to adopt Interim Credentials curriculum v2.

1. Please visit info.interimcredentials.com. There is a great deal of information located here at your fingertips. The content under the News and Resources tabs is particularly helpful. Bookmark this website for easy reference because you will want to refer to it regularly as it is a primary location for seeking assistance.



2. On the Resources page, please locate the New Account Information Form PDF, save to your local drive, fill out and submit according to the directions provided. This is also where you should submit your organization's w-9 and purchase order. Please note that we require purchase order numbers to be submitted with online orders.





INTERIM CREDENTIALS

NEW ACCOUNT INFORMATION FORM

LEGAL NAME OF ORGANIZATION

ORGANIZATIONAL STRUCTURE

NON-PROFIT CORPORATION PARTNERSHIP PROPRIETORSHIP

TYPE OF ORGANIZATION

HIGH SCHOOL JATC PRE-APPRENTICESHIP TECHNICAL COLLEGE VEEP

MAILING STREET ADDRESS

CITY STATE ZIP

BILLING STREET ADDRESS

CITY STATE ZIP

ACCOUNTS PAYABLE NAME

EMAIL PH.

PROGRAM ADMINISTRATOR NAME

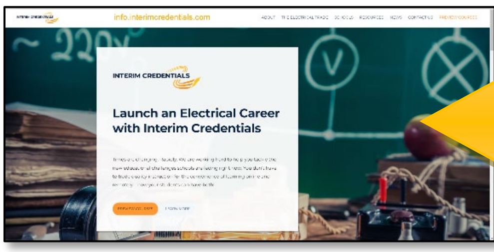
ADMINISTRATOR PH.* ADMIN. EMAIL*

Please note:

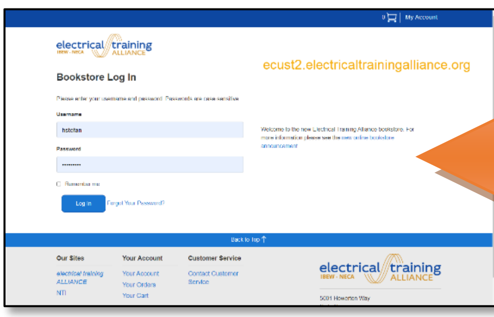
1. Purchase order numbers are required to place any orders. For your convenience we can provide a fillable PDF form for those who need an estimated cost letter to obtain purchase orders in advance of placing orders. The form can be located on our info.interimcredentials.com website under SCHOOL RESOURCES.
2. This designated Dropbox folder serves as a depository for new account forms and their associated W9s during the account set up process.
3. It is the administrator's responsibility to ensure paperwork is submitted in a timely manner.
4. The creation of new accounts will require turnaround time, but we do our best to do so as quickly as possible.

(*Designated program administrator is responsible for: setting up accounts once access is provided, rostering and enrolling teachers and students, placing orders, assigning licenses and access tokens, managing bookstore invoicing, and ensuring users have account access.)

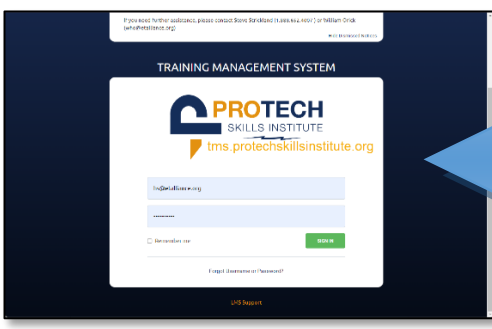
3. Once you submit the form, it will be sent to a customer service manager via email to request the new account. One or more individuals will contact you to set it up. This may take one or two days, as requests are addressed in the order in which they are received.
4. The individual who is designated as the IC administrator on the new account information form will receive the initial emails containing access information for the electrical training ALLIANCE Bookstore and PTSI Training Management System. This will allow the administrator to take the necessary steps to finish setting up the accounts so teachers and students can log into the PTSI Learning Management System and begin using the course. Please bookmark the following websites for easy access later:



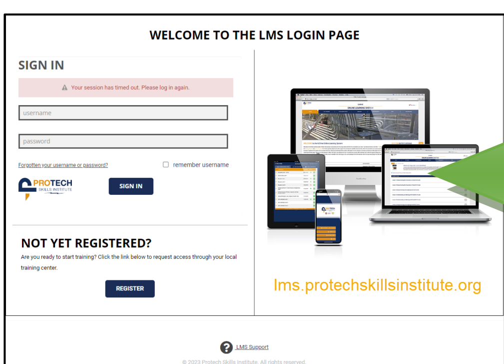
Info.interimcredentials.com serves as both a marketing and support site. The site will be updated regularly with new materials and guidance to help administrators and teachers learn the curriculum and understand how it leads students towards a rewarding career in the electrical industry.



The *electrical training ALLIANCE (etA) bookstore* is the location in which administrators will purchase licenses for users. There are also other items for additional cost such as textbooks, calculators, 2023 NEC Code Books, additional courses, notebooks, etc.



The Training Management System (TMS) is the portal for administrators and assistant administrators to purchase access tokens (students) and subscriptions (teachers), roster students, set up class sessions and enroll teachers and students in them.

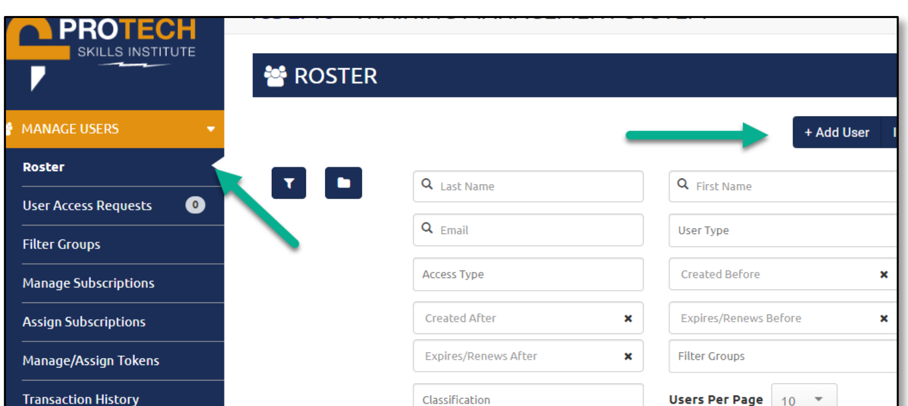


The Learning Management System (LMS) is the portal in which teachers and students will access the curriculum content, directions, lessons, scores, progress reports and certifications.

These websites are listed in the order in which a new account will access them for initial set-up.

5. The following is an overview of the set-up process for administrators. While not every detail is included, this provides an excellent outline.

1. Reset your bookstore password after receiving an email that provides the link to do so from Customer Service.
2. Log into the etA Bookstore and look around. There is an Interim Credentials catalog of items available on the info site to assist you.
3. To purchase licenses, visit the "Courses" page. Choose "Interim Credentials" to be taken to the product page. Enter the number of licenses needed (students and teachers) and "Add to Cart".
4. Once you have finalized your selections and are ready to check out, click on the shopping cart icon located in the blue ribbon at the top of the page.
5. Choose "Terms" and proceed with the check out process. Note that shipping information and purchase order number is required to move forward to the next page by clicking "Terms and Conditions." After reviewing terms and conditions, choose "I agree, submit order".
6. Account information and purchase history is available in your bookstore account. Find "My Account" in the top right hand corner of the screen to access.
7. Log into the Training Management System (TMS) using the credentials provided by etA.
8. Read all of the content on your dashboard for help and detailed guidance within the TMS regarding next steps.
9. To begin, go to Roster, the first item in the lefthand menu. Once the page is open, click "Add User" towards the righthand side of the screen.



10 Roster each user - students and teachers. Only name and email are required. For user type, teachers are instructors and students are CETs. Be sure to keep a list of passwords to provide to users. They can reset passwords on the log in page. Reset your bookstore password after receiving an email that provides the link to do so from Customer Service.

11 For students, return to the left hand menu and choose "Manage/Assign Tokens". You will see two token types listed - "IC View" which provides 21 days of free access; "Interim Credentials" which is the paid token that provides 720 days of access. **You can use** the free token initially **until you** finalize your roster, **and** then apply paid token.

12 To acccess either token, click the cog symbol at the end of the token line, and choose "Purchase". In the following pop up screen, enter the number of tokens needed, enter PO number, and click save. The next pop up will provide a transaction statement to print. This is not an invoice.

13 Return back to the Manage/Assign Tokens page. Again, choose the same cog symbol at the end of the tokens you purchased, and choose "Assign". Choose the students that require a token, and choose "Save". At this point, all users should have a license and token that provide access to the course once enrolled.

14 Return to the lefthand menu and choose "enrollment". Choose the students to enroll. If they have a green dot by their names, it means they are available for enrollment. Click "Next" at the bottom of the screen to move to next step, "Choose Courses".

15 On the "Choose Courses" screen, you should see Interim Credentials listed on this page. (You can also see a snapshot of the number of licenses are still available.) Choose Interim Credentials then next. (If the course is not listed, you do not have any available licenses. Go back to the bookstore and purchase enough licenses for each student and teacher.)

16 You should now be on the "Enroll Instructor" step. Choose "Interim Credentials" under "Courses to Enroll". At this time, instructors will appear under Available Instructors. Choose the correct individual, then click next to proceed to the "Specify Session Name" screen.

17 On the Session Name screen, please create a name for the session. This is a how to delinate one class or group from another. To add users to a session already created, choose dropdown menu of existing sessions and Next.

18 You should now be located on the "Specify Access Date" screen. On this page, you can set an overall access date for everyone, or specify access dates per person. Then choose Next to verify enrollments. Once you review all enrollments, click "Submit". You're done!

Teachers and students can now log into the Learning Management System (LMS) and begin accessing content on the date specified during the enrollment process.