Direct Billing Voucher Guide

This guide provides you with step-by-step instructions for creating and managing vouchers for all PTCB Products, including the Practice Exam.

Managing Your Direct Billing Account

This is your account homepage. Important alerts are provided at the top of the page, under the home button. Check here for important updates. In the event you also have a CPhT account, the top right of the screen will let you know which account you are logged into.

Direct Billing Management

The Direct Billing Management tile on your PTCB Account homepage provides you access to manage vouchers for your eligible candidates.

Voucher Selection

You are also able to toggle between the different PTCB Products your organization provides vouchers for. For example, you can select PTCE, CPhT renewal, CSPT Exam, Assessment-Based Certificate fees, and the PTCB Practice Exam. Only one option will show until you've enrolled in direct billing for additional credentials.
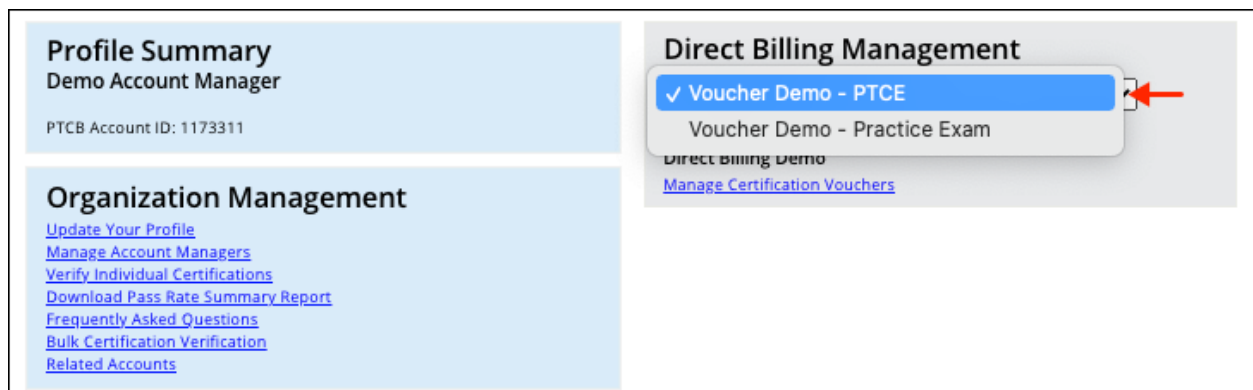
Manage Certification Vouchers

You will be creating vouchers for each of your eligible candidates. If you have multiple options for vouchers, select which option you would like to manage vouchers for.

To begin, click the Manage Certification Vouchers link.

Which vouchers you are managing will always be indicated in the upper right-hand corner of the page you are on.

Important

Vouchers created under PTCE will only work on the application for the PTCE. Vouchers created under Practice Exam will only work when purchasing a Practice Exam. Please be sure to instruct your candidates to choose appropriately within their PTCB Account. Candidates select your organization from a dropdown menu within the application process. If a candidate's voucher is not recognized, have them check that they are on the correct application.

Voucher Management

This page allows you to create new vouchers, view details about candidates assigned to specific vouchers, withdraw candidate voucher numbers, and export information to a file.

Sponsorship - Manage Certification Vouchers

Please use this page to manage your candidates' information pertaining to certification vouchers. This page allows you to view details about candidates assigned to specific vouchers, withdraw candidate voucher numbers, and export information to a file.

Once you assign and share voucher numbers with specific candidates, you may click the **Designated For** column by that voucher number and enter their name. (Please note: using this field will NOT assign the voucher within the PTCB system; it is meant to be used as a tool for you track your vouchers more clearly.) You may then instruct your candidates to create or log in to their PTCB Account and apply for certification. During the application process, a candidate must designate they are being sponsored by your organization and enter a voucher number in the appropriate field. As soon as the candidate enters this number into the system, it will appear as assigned on the portal below and you can track information such as exam date and pass/fail status. If you chose to note who the voucher was designated for, you can verify that the correct individual used the voucher.

As a sponsor, you will be able to withdraw any candidate's voucher up to 24 hours before they are scheduled to take their exam as long as they do not have a current testing appointment.

You may search for an individual candidate using the following fields. The default view is the past 90 days.

Add Vouchers

First Name [optional]

Last Name [optional]

Store / Campus Number [optional]

Student / Employee Id [optional]

Vouchers Claimed On / After [optional]

Vouchers Claimed On / Before [optional]

Vouchers Created On / After [optional]

Vouchers Created On / Before [optional]

Voucher Status [optional]

All

Search   **Reset**

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Create and Assign Vouchers

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Vouchers Created On / After [optional]

Store / Campus Number [optional]

Vouchers Created On / Before [optional]

Student / Employee Id [optional]

Voucher Status [optional]

All
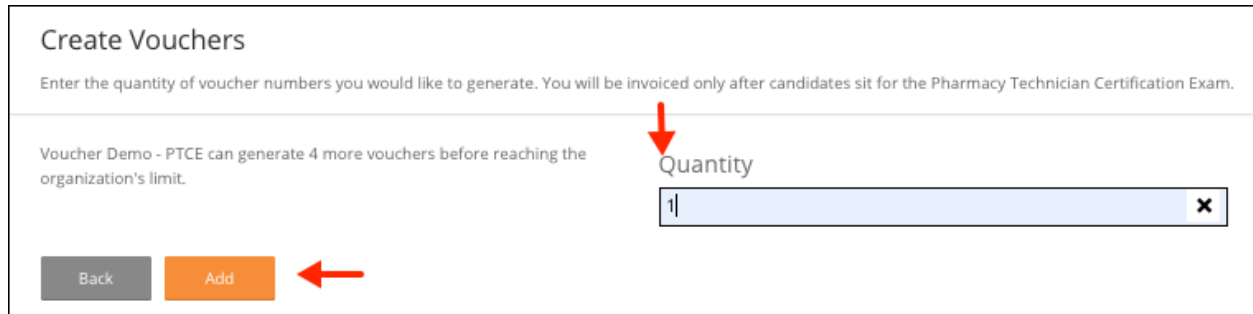
Vouchers Claimed On / After [optional]

Search   Reset

Click Add Vouchers to create.

Voucher Quantity

You initially have the ability to create 100 vouchers. Your organization is not charged for the number of vouchers created in this step. You are only charged for vouchers used for an exam appointment. (If your organization is using vouchers for CPhT renewal or another credential exam, the same policy applies.)

Enter the number of vouchers needed and click Add.

You will be directed back to the Manage Certification Vouchers screen where you will see the newly created voucher(s).

Create and Assign Vouchers

☐	Created	Voucher #	Voucher Status	Application Status	Claimed	Exam Date	Exam Status	Designated For	Claimed By	
☐	05/13/2020	30497836	Unassigned					[Unassigned]		Details
☐	10/19/2018	30484588	Unassigned					[Unassigned]		Details
☐	09/07/2018	30483220	Unassigned					Liza Chapman		Details
☐	09/07/2018	30483218	Unassigned					[Unassigned]		Details
☐	09/07/2018	30483219	Unassigned					[Unassigned]		Details
☐	09/07/2018	30483216	Unassigned					[Unassigned]		Details
☐	09/07/2018	30483217	Withdrawn by Sponsor		10/17/2018		Canceled	Test Tester	Tester, Tester	Details

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Export to .csv   Withdraw Selected

The newly created voucher(s) will appear here. Distribute the vouchers to your candidates and instruct them to create or log into their PTCB Account and apply for certification. When distributing vouchers to your candidates, it is important to let them know for which exam the voucher was created.

During the application process, a candidate must designate that they are being sponsored by your organization and enter a voucher number in the appropriate field when prompted. When the candidate enters this number into the application, it will appear as assigned within the portal. You are not required to enter any candidate information.

Once the voucher is used by your candidate, you will be able to see more information, such as application date, exam date, and pass/fail status. If you chose to note who the voucher was designated for, you can verify that the correct individual used the voucher.

Vouchers do not expire and are only good for one application. If your candidate applies using a voucher and withdraws their application with the intent to apply again, a new voucher will need to be created and issued for each application. As a reminder, organizations are only charged for vouchers that are used.

Note: When providing the voucher numbers to your candidates, indicate for which exam the voucher was created. For example, Voucher 30497836, PTCE. The candidates can follow the [*CPhT Candidate Application Guide*](#) *for detailed, step-by-step instructions. It may be helpful for you to also review this guide.*

Assign and Designated For

To assign, click [Unassigned] in the Designated For column. Using this field will NOT assign the voucher within the PTCB system; it is meant to be used as a tool for you to track your vouchers.

Note: The Designated For column is only for your tracking. This does not assign the voucher to your candidates. Please distribute the vouchers to your candidates and indicate for which exam the voucher was created. The Claimed By column will populate when the candidate redeems the voucher.

Withdraw and Export

Withdraw

You are able to withdraw any voucher, or a group of vouchers, as long as there is not a current testing appointment. Once the candidate has scheduled the exam, the candidate must cancel the scheduled exam appointment with Pearson VUE before the voucher can be withdrawn. If you no longer have contact with the candidate, please submit a Help Center Request to have the exam appointment canceled. When sponsorship is withdrawn, the assigned voucher number becomes void, and cannot be used again.

Export

You may export information tables to a CSV file in order to create flexible reporting suited to specific needs. Look for the Export to .csv button at the bottom of the page and specify the location to save the file.

You have the ability to select all or select individual voucher numbers.

☑	Created	Voucher #	Voucher Status	Application Status	Claimed	Exam Date	Exam Status	Designated For	Claimed By	
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☑	10/19/2018	30484588	Unassigned					[Unassigned]		Details
☑	09/07/2018	30483220	Unassigned					Liza Chapman		Details
☑	09/07/2018	30483218	Unassigned					[Unassigned]		Details
☑	09/07/2018	30483219	Unassigned					[Unassigned]		Details
☑	09/07/2018	30483216	Unassigned					[Unassigned]		Details
☑	09/07/2018	30483217	Withdrawn by Sponsor		10/17/2018		Canceled	Test Tester	Tester, Tester	Details

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Export to .csv   Withdraw Selected

Status Definitions

Voucher Status	
Unassigned	Voucher has been created but is unassigned.
Assigned	Voucher is assigned at the point a candidate applied and entered their voucher.
Withdrawn	Candidate or Account Manager withdraws a voucher. This will not be included on the monthly invoice.
Tested	A voucher was used to take the test. This will be included on the monthly invoice.
Expired	Sponsorship expired. These will not appear on the monthly invoice.
Application Status	
Submitted	A candidate completed an application using sponsorship.
Approved	Candidates who have been approved by PTCB and have not yet taken the exam.
Denied	Individuals who PTCB determines are unfit to take the exam.
Completed	This occurs after a candidate passes the exam and is certified.
Withdrawn by Candidate	A candidate withdraws their application.
Exam Status	
Authorized	A candidate is approved to test.
Canceled	Exam appointment has been canceled. This will not be included on the monthly invoice.
No-Show	A candidate does not appear for a scheduled exam appointment or cancel within 24 hours. This will be included on the monthly invoice.
Expired	A candidate's 90-day test window has expired. This will not be included on the monthly invoice.

Emergency Withdrawals

If a candidate is unable to cancel their appointment due to an emergency, they should fill out the Emergency Withdrawal Request Form. This completed form and supporting documentation should be submitted through our Help Center. When the emergency withdrawal request is approved, the exam will not be included on your invoice. If an invoice was sent with the emergency withdrawn candidate listed with a No-Show status, we will provide a new invoice or issue a credit if payment has been made.

Manage Account Managers

As an account manager, you have the ability to add additional account managers. To add an additional account manager, click Manage Account Managers.

The account manager you are adding must have already created an account by registering at ptcb.org. The email address used for an account manager account has to be an email address affiliated with your organization and cannot be a personal email address or an email address affiliated with a CPhT account.