



## PORTAL QUICK START GUIDE

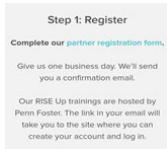
*Last updated July 2022*

This guide covers the basics to get you started with the NRF Foundation's [RISE Up](#) training and credentials. You can also access our FAQs page [here](#).

If you experience any technical or account questions, you can get help from our support team by scheduling an appointment [here](#), emailing [support@nrfriseup.com](mailto:support@nrfriseup.com) or calling **1-800-986-6482**.

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## How do I become a RISE Up training partner?

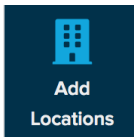
- Click [HERE](#) to complete our partner registration form
- Please allow 1-2 business days to receive your confirmation email from Penn Foster
- [W-9 form](#)

### PARTNER PORTAL

## How do I log in to the RISE Up Partner Portal?

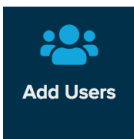
- Click [HERE](#) to launch the RISE Up Partner Portal application
- Enter the username and password that were emailed to you from RISE Up (*Emails will come from the following addresses and may need to be “whitelisted,” depending on your organization’s email system: retail@pennfoster.edu, support@nrfriseup.com and reply@foundation.nrf.com. You can also “whitelist” those same website domains: my.pennfoster.com, pennfoster.edu, lpp.learnermanagement.com and bigcommerce.com*)



## How do I set up additional classroom locations under my account?

- Click on the “Add Locations” tile from the menu options on the left of the portal screen
- Click on the “Create New Site” button
- Enter the location, site name and store number (for retailers with multiple stores)
- Click “Create Site”

*Note: You can also edit the default location that is set as your partner name. This will be searchable on the enrollment and trainer applications.*



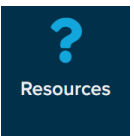
## How do I add my trainers/proctors to my account?

### New User

- Click on the “Add Users” tile from the menu options on the left of the portal screen
- Click on “Create New User”
- Enter the users role, location and information
- Click “Create User”

### Pending User

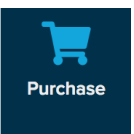
- Click on the “Add Users” tile from the menu options on the left
- Click on “Create New User”
- Click on “Pending Action”
- Review information and then to approve, click “Create User”



## How do I submit an admin change request form?

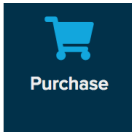
- Click on the “Resources” tile from the menu options on the left of the portal screen
- Click on [“Admin Change Request”](#) at the top of the page on the right

*Note: Fill out the admin change request form to remove the current administrator on your account and add yourself*

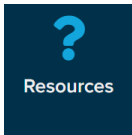


## How do I purchase and view licenses?

- Click on the “Purchase” tile from the menu options on the left of the portal screen
- A new tab will open in the BigCommerce storefront



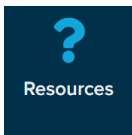
- Add the licenses and bundles you wish to purchase to your cart
- Click “Check Out”
- Enter billing and payment information/Purchase order number
- Click “Place Order”
- Click on the “Manage Licenses” tile to view purchased licenses



#### How do I submit a quote request?

- Click on the “Resources” tile from the menu options on the left of the portal screen
- Click on “[Quote Requests](#)” at the top of the page on the right of the portal screen

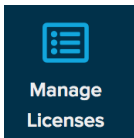
*Note: Quote requests take about 1-2 days to process*



#### How do I submit a refund request?

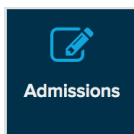
- Click on the “Resources” tile from the menu options on the left of the portal screen
- Click on “[Refund Requests](#)” at the top of the page on the right

*Note: Refund requests must be submitted within 30 days of purchase*



#### How do I transfer licenses to a classroom location?

- Click on the “Manage Licenses” tile from the menu options on the left of the portal screen
- Click on “Transfer Licenses” on the program you wish to transfer in the “OpenLicenses” section (right side of the screen)
- Select “Yes” on the pop up if you would like to transfer licenses
- Choose one or multiple sites you wish to transfer licenses. If you have not created a site yet, you can do so in the locations tile
- Use the arrows or type in how many licenses you wish to transfer
- Click “Transfer” to complete the process
- The licenses will now move from the “open license” section to the “transferred license section”



#### How do I enroll learners?

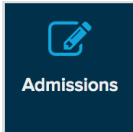
- Click on the “Admissions” tile from the menu options on the left of the portal screen
- Click “New Enrollment,” “New Lead” or “Bulk Leads”

##### **New Enrollment (automatically enrolls your learner into the license seat)**

- Select your location, if applicable
- Select the program and enter the learner’s information
- Click “Add as an Enrollment”
- The learner is now enrolled

##### **New Lead (captures the learner’s information until you are ready to enroll)**

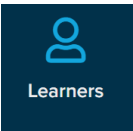
- Select your location, if applicable
- Select the program and enter the learner’s information
- Click “Add as a Lead”
- Select the learner’s name
- Click “Enrolled Selected”
- The learner is now enrolled



### **Bulk Leads (captures all learners' information until you are ready to enroll)**

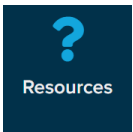
- Click "Bulk File Upload"
- Click "Download bulk lead template"
- Fill out the template
- Click "Upload completed template"
- Click "Next"
- Fill out the "Program, Organization and Location" for the uploaded file
- Click Submit
- You will receive a pop-up window that reads, "Your file has been submitted"
- You will see your leads in the admissions tile
- Select the learners' names
- Click "Enrolled Selected"
- The learner is now enrolled

*Note: Each learner enrolled will deduct one seat license from your account. You can also enroll ~~leads~~ directly by selecting "New Enrollment" or "New Lead"*



### **How do I view my enrolled learners?**

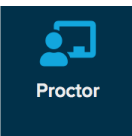
- Click on the "Learners" tile from the menu options on the left of the portal screen
- You can view all your enrolled learners in this tile



### **How do I submit a reallocation request?**

- Click on the "Resources" tile from the menu options on the left of the portal screen
- Click on ["Reallocation Request"](#) at the top of the page on the right

*Note: Reallocation requests are granted for licenses that have not been used within 45 days of enrolling the learner*



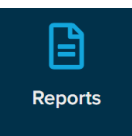
### **How do I become a proctor?**

- Click on the "Proctor" tile from the menu options on the left of the portal screen
- Click "Accept & Sign" from the pop-up window
- Review the document and click on the yellow button to electronically sign

*Note: Proctors must be added to the account by the administrator*

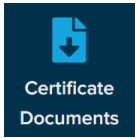
### **As a proctor, how do I check in students and find their exam password?**

- Click on the "Proctor" tile from the menu options on the left of the portal screen
- Check in students by clicking on the check mark next to their name
- Find their password in the list at the bottom of the page
- To mark a violation, click on the flag to the right of the student's name



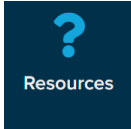
### **How do I download learner reports?**

- Click on the "Reports" tile from the menu options on the left of the portal screen
- Select a date range and then click "Apply"
- Select a report output type (PDF, Excel or Word)
- Select the learner's status you would like to view
- Find the report type and click "View Report"



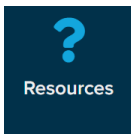
### How do I download learner certificates?

- Click on the “Certificate Documents” tile from the menu options on the left of the portal screen
- Select a date range and then click “Apply”
- Use the filters to narrow down the results
- Select individual student documents by using the check boxes on the left
- Click “Download” to start the download process



### How do I access training guides and PowerPoints?

- Click on the “Resources” tile from the menu options on the left of the portal screen
- You can view all training guides and PowerPoints in the Resources tile



### How do I submit a technical error request form?

- Click on the “Resources” tile from the menu options on the left of the portal screen
- Click on [“Technical Error Request”](#) at the top of page on the right
  - Fill out the Technical Error Request form if you are experiencing portal issues