ITC Policies and Procedures Guide

PEARSON

Contents

Registering and Scheduling Candidates

This chapter contains the following sections:

Overview

Registering a candidate for a test and scheduling an appointment involves the following main steps:

The main purpose of Registration Manager is to make test registrations and to verify candidate information.

1. **A candidate registers for a test through the ITC.**

   - Candidates can call or visit an ITC to register for a test and schedule an appointment. You can schedule appointments at your own ITC using the Registration Manager application.

2. **The candidate's record is located or created in the testing system database.**

   When a candidate first registers to take a test, a record for the candidate is created in the Pearson VUE Testing System database. This record contains information such as the candidate's postal address, email address and phone number.

When a candidate wants to schedule a test, it is critical that you do not create a record for the candidate until you have first searched the database to check whether or not a record already exists. If duplicate records are created for a candidate, the candidate's test results could be distributed across multiple records; the candidate's certification may be delayed until the records are merged by CITB. It will save candidates a great deal of time in the long run if you work with them up-front to be sure they do not have existing records. In addition, using an existing record makes the scheduling process go more quickly.

If you are creating a new candidate record, the candidate will need to agree to a Consent Requirement that will appear on Registration Manager.

3. **On behalf of the candidate, the ITC specifies which test he or she wants to take and confirms the appointment date and time.**

A separate record, called a *registration* is created each time a candidate registers and schedules a test appointment for a specific test. The registration contains information regarding which test the candidate wants to take and where the candidate plans to take the test. When you view a candidate's test history in Registration Manager, you see all of the test registrations a candidate has made.

Some candidates may require special accommodations/assistance. If a foreign language voiceover or on-screen British sign language is requested, this can be provided by the ITC. For all other assistance, for example a reader or interpreter, candidates must book their test through a standard Pearson VUE test centre by calling the Special Assistance booking line on 0344 994 4491.

Once you have scheduled the preferred test date and time, click *CITB-ConstructionSkills ITC Zero Discount* to ensure that the payment type is *none* and save.

4. **It is the ITC's responsibility to collect payment for the test from the candidate on the date of testing. CITB will then invoice the ITC on a weekly basis following the completion of each test. Pearson VUE sends the candidate a confirmation letter.**

The letter confirms the appointment and summarises appointment information such as the ITC name and appointment date and time. The confirmation can be sent by email or post, with an optional reminder sent by email or text.

Registration and scheduling script

Since there are many details to remember when registering and scheduling candidates, Pearson VUE has created a sample script for you. Use this script to guide you through the process of successfully scheduling candidate appointments, either in person at your ITC or over the phone. Once you become comfortable with the process, you will not need to follow the script, although you may want to keep it handy as a reference.

ITC:	This is [your name]. How may I help you?
Candidate responds:	*I would like to take a Health, safety and environment test.*

ITC:	Have you scheduled a test appointment with Pearson VUE before?
Candidate responds.	
Action:	If the candidate has previously scheduled a test with Pearson VUE, he or she will probably already have a record in the database. If this is the candidate's first test, you will probably need to create a new record for the candidate. However, be sure to search for the candidate's record even if he or she has not previously tested with Pearson VUE.

ITC:	Could I get your first and last names with correct spelling please?
Candidate responds.	
Action:	In Registration Manager, click the **Customers** button. Next, click the **Search** button and enter candidate's name, and then click the **Search** button.

- If a record is found for the candidate, verify the candidate's name. If there are multiple records for the same person, select the record that contains an ID. If there are multiple records with the same name, verify the information with the candidate so you are sure to select the correct record.
- If no record is found for the candidate, try searching for the candidate using other information, such as a phone number.
- If a record is still not found for the candidate, close the Find Candidates window, click the **New** button.

A message will appear making sure that you are creating a new record only once in the system for a candidate and that the candidate agrees to the consent requirement (see below) before proceeding.

ITC:	Before I proceed, there is a consent requirement that I'd like to advise you of. Please let me know after I finish reading this if you agree or disagree.
	"By registering at the ITC, you are accepting the privacy policy of Pearson VUE, a business of NCS Pearson, Inc., located on our web site at www.pearsonvue.com. By providing your personal information, you consent to the collection, use, and transfer of your personal data to Pearson VUE and CITB."
	*(**Note:** If the candidate asks to hear the statement again, read the statement again to the Candidate.*
	If the candidate is at the ITC and not registering through the phone, you may present a paper copy of the consent requirement to the candidate to read. This can be downloaded from the Downloads page on VSS.)
Candidate responds.	
Action:	▪ If the candidate <u>agrees</u> to the consent requirement, click **Yes**, and enter the candidate information on the tabs. After the record is found or created, verify the candidate's email address, company name, phone number, fax and whether the information is for home or work. Once the information is verified, click **Save**.
	▪ If the candidate <u>does not agree</u> to the consent requirement or has any questions or concerns, **do not** create the new record. Refer the candidate to PearsonVUEContracts@pearson.com or 001 (952) 681-3918 with their questions and concerns.
	Continue onto the next script below if the candidate agrees to the consent requirement.
ITC:	Which test would you like to take?
Candidate responds.	
Action:	▪ Click the **Exams** button. ▪ In the **Select Client** field, choose CITB. ▪ In the **What** list, select the test name.
ITC:	On which date would you like to take the test?
Candidate responds.	
Action:	Enter dates in the **Dates from** and **through** fields and click the **Find Times** button. (Instead of typing a date, you can click in the field and press the up or down arrow key on the keyboard to change it.)
	Note: If the candidate wants to register to take a test at your ITC today, you can make the registration if you have an available appointment time.
ITC:	We have openings for that day starting at [time] and going until [time]. What time would you prefer?
Candidate responds.	
Action:	Select the date/time the candidate wants. Click the **Schedule** button.

ITC:	Okay, I have you scheduled for the [test name] test, on [test date] at [test time]. (**ITC clicks CITB-CSkills ITC Zero Discount to process the test without taking payment at this stage**).
ITC:	And just to remind you, we ask that you arrive 15 minutes before your scheduled appointment to fill out any necessary paperwork. Bring appropriate forms of identification to your appointment. If you need to cancel or reschedule your appointment, you need to call us at least one day before your appointment. Pearson VUE will email or post you a confirmation letter (as requested) with your appointment information. You should receive this within the next day or two, depending on how the letter is sent.
Action:	Confirm all information is correct. Click the **Save** button and wait for an order number to be displayed, and then click **OK**.
ITC:	Is there anything else I can help you with today? Do you need directions to the test centre?
Candidate responds.	
ITC:	Thanks for calling our ITC. We look forward to seeing you soon.
	Note: If a candidate requires special assistance (for example, a language voiceover) these can be booked at the same time by clicking the Accommodations button. If they need special assistance such as a reader or interpreter please ask the candidate to call the Special Assistance booking line on 0344 994 4491 to book a test at a standard Pearson VUE test centre.

Starting Registration Manager

To run Registration Manager, you must be authorised to use the application. Since all candidate, registration, and scheduling information is stored in the testing system databases, you need to be connected to the hub in order to use Registration Manager.

For security reasons, the Registration Manager application should never be left running unattended. When you are done using Registration Manager, or if you need to leave your desk, be sure to close the application.

1. **To open Registration Manager, click the Start button on the Windows taskbar and choose Programs | VUE Applications | Registration Manager.**

    An introductory screen appears, followed by the Login dialog box as shown below.
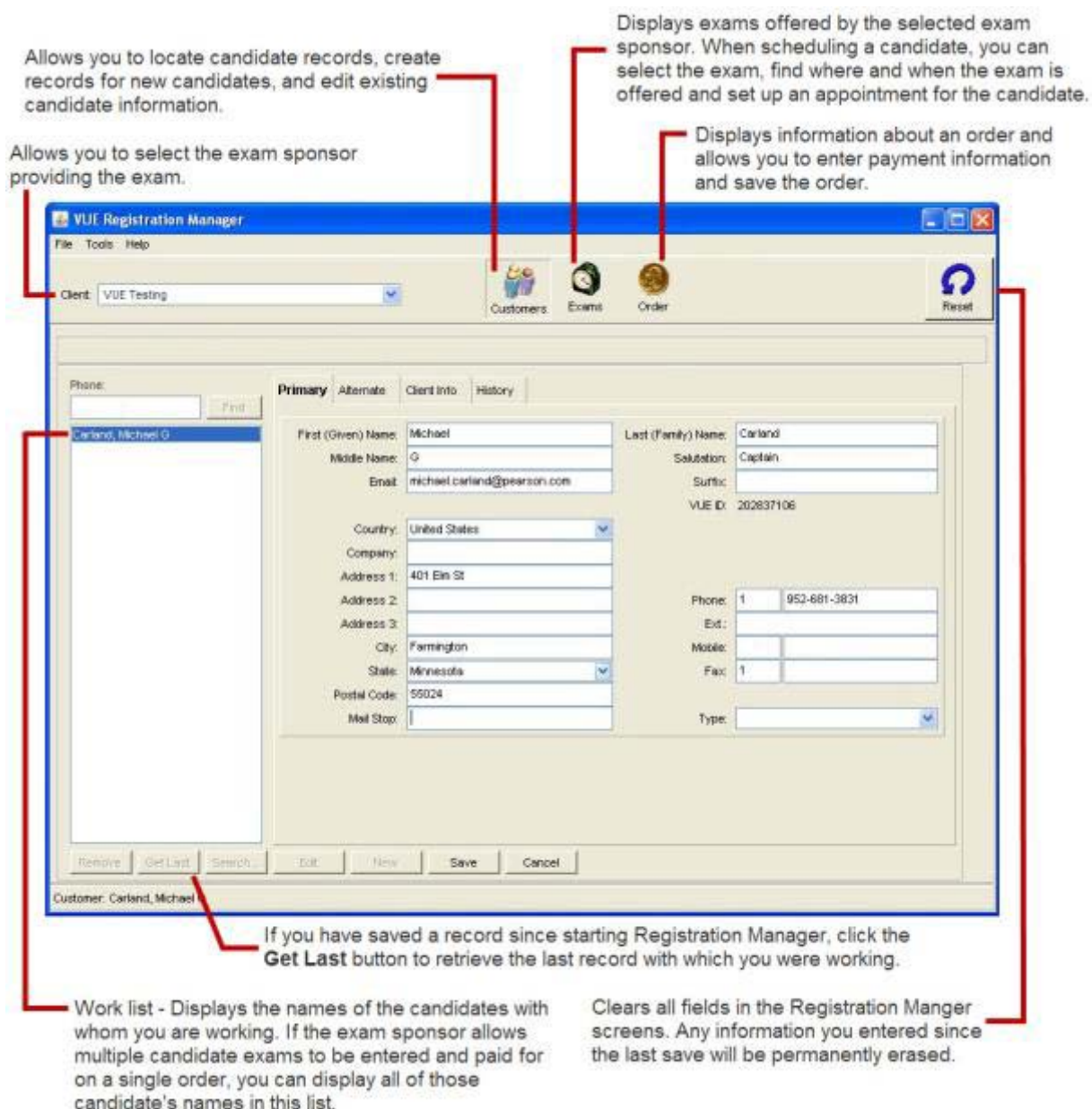
VUE Registration Manager - Login

User Name:

Password:

OK

Manage Account

Cancel

2. In the Login dialog box, type your username and password for the Pearson VUE applications and click OK.

When you open Registration Manager, the Customers window is displayed and the **Primary** tab is selected. The illustration below shows the main buttons and features of the Registration Manager window.

Displays exams offered by the selected exam sponsor. When scheduling a candidate, you can select the exam, find where and when the exam is offered and set up an appointment for the candidate.

Allows you to locate candidate records, create records for new candidates, and edit existing candidate information.

Displays information about an order and allows you to enter payment information and save the order.

Allows you to select the exam sponsor providing the exam.

If you have saved a record since starting Registration Manager, click the **Get Last** button to retrieve the last record with which you were working.

Work list - Displays the names of the candidates with whom you are working. If the exam sponsor allows multiple candidate exams to be entered and paid for on a single order, you can display all of those candidate's names in this list.

Clears all fields in the Registration Manger screens. Any information you entered since the last save will be permanently erased.

Locating a candidate's record

Before you can perform a task for a candidate, such as scheduling, rescheduling or canceling a test appointment, you must locate the candidate's record in the testing system database.

If you are registering and scheduling a new candidate, it is critical that you perform a search before creating a new record for the candidate to avoid creating a duplicate record. The ability to register your own candidates provides your ITC with a powerful business tool. Registration performance will be monitored weekly, and Pearson VUE will work with individual ITCs to make needed improvements.

There are several ways of searching for a candidate's record:

❖ If the candidate's name is already displayed in the **work list** on the left side of the window, click the candidate's name in the list. The candidate's information is inserted in the fields in the Customers window.

❖ Use the **Get Last** button. If you just saved a record, you can click the **Get Last** button to retrieve the last record with which you were working.

❖ Enter the candidate's **Order Number** or **Registration ID Number**. Entering one of these numbers on the History tab in Registration Manager allows you to quickly find an existing candidate record. A candidate will have one of these numbers only if he or she has previously scheduled a test appointment through Pearson VUE.

- After scheduling, a candidate receives an order number.

- If the candidate received a confirmation letter from Pearson VUE, the order number is listed in the letter.

Ask the candidate for the order number (or enter the registration ID number, if you know it), click the History tab, choose **Exam History, Using Order No** or **Exam History, Using Reg ID**, and enter the number.

❖ Enter the candidate's **first and last name or other criteria**. Clicking the **Search** button displays the Find Candidates window. Using this window, you can perform a thorough search of the database by entering a variety of criteria.

❖ Enter the candidate's **phone number**. This type of search works best when you know for sure the candidate has an existing record in the database and you know that record is recent (so that the phone number is current). For example, you may want to try this search method if the candidate is calling to schedule a retake of a test he or she took recently.
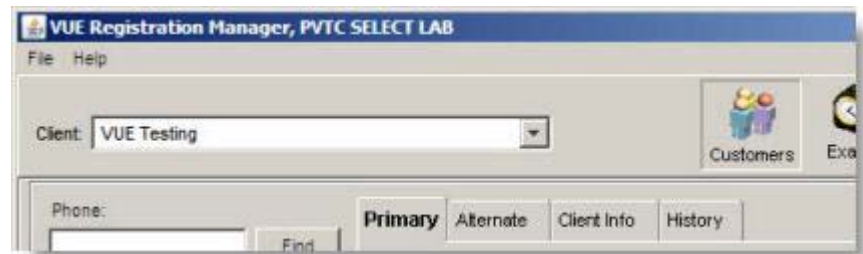
Starting the search

Follow these steps to begin searching for a candidate's record:

1. **Ask the candidate if he or she has previously scheduled a test appointment through Pearson VUE.**

   Asking this question helps you determine whether or not you should find a record for the candidate when you search the database.

   - If the candidate has not previously scheduled through Pearson VUE, then he or she probably does not have a record in the database (although you still need to search to be sure).

   - If the candidate has previously scheduled through Pearson VUE, then he or she probably does already have a record in the database.

   - If the candidate is rescheduling or cancelling an appointment, then he or she does already have a record in the database.

2. **Click the Select Client field in the upper left corner of the Customers window in Registration Manager and choose CITB from the list.**

3. **Perform the search.**

   If you know the candidate has a record in the database, you can quickly search by entering the candidate's Order Number or Registration ID if the candidate has the number. You can also try searching using the candidate's phone number.

Using the search button

The **Search** button on the Customers window allows you to search for a candidate record by entering a variety of criteria. Follow these steps:

1. **Perform the steps listed in "Starting the search."**

2. **Click the Search button at the bottom of the Customers screen.**

   The Find Candidates window is displayed. This window allows you to enter a variety of criteria and then perform a search.
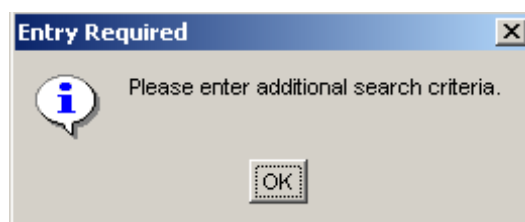
3. **Enter criteria in the Search Criteria area.**

Normally, you will search by entering the candidate's first name and last name, but you can also enter other information about the candidate records you want to find. At a minimum, you must enter either first name and last name, email address, phone number or client candidate ID. As long as you enter at least one of these criteria, you can also enter other criteria such as company or city. All criteria that you enter are used in the search, which means that a candidate's data must match *all* of the criteria you entered in order to be considered a match.

- You must enter data in at least one of these fields: **First Name** and **Last Name**, **Email**, **Phone** or **Client Candidate ID**.

- You can type just the *beginning* of a word in the **First Name**, **Last Name**, **City** or **Company** field to find all entries that begin with the characters you entered. For example, typing "Johns" in the **Last Name** field finds candidates whose last name is "Johns" and also candidates whose last name is "Johnson."

- Click the **Clear** button to clear the entire Find Candidates window.

4. **After selecting options and entering search criteria, click the Search button.**

As stated in step 3, you must enter a minimum amount of information when performing a standard search. If you did not enter the minimum amount of information required, a message displays when you search, as shown below.

If any records matching your criteria are located, a list of candidates are displayed in the Search Results area as shown below.

If no records are found, be sure you entered the search criteria correctly. If you have trouble finding a record for a candidate *and you are sure that a record should exist*, ask the candidate if any of the information you used as search criteria has changed since he or she last registered. For example, ask the candidate if he or she previously used a maiden name, nickname or formal name. If you are still unable to locate the record, call VSS for assistance.

By default, the search results are organised by Name in ascending order. You can sort the results in ascending or descending order by any of the columns. To do this, click the column name once or twice.

5. **Click one or more boxes in the Select column in the Search Results area to choose which candidate records you want to work with.**

A checkmark in the box indicates that the record is selected.

If multiple records were located in the search, be sure to select the correct record. For example, candidates with the same or similar names might be found. Verify the information with the candidate to ensure that you choose the correct record.

6. **You can now do one of the following:**

   - Click **OK** to return to the Customers window in Registration Manager. The names from the candidate records you chose in step 5 are displayed in the work list on the left side of the window.

   - Click **Cancel** to return to the Customers window without selecting records.

After locating a candidate's record, you can edit it or register the candidate and schedule a test appointment. You can also use the History tab to perform tasks such as rescheduling an appointment. If you did not locate a record, you can create a new one.

Using the find button

The **Find** button in the Customers window allows you to search for a candidate record by entering a phone number. Follow these steps:

1. **Perform the steps listed in "Starting the search."**

2. **Ask the candidate for his or her phone number (including area code). Type the phone number in the Phone field in the Customers window. Click the Find button.**

   You do not need to enter punctuation or spaces when typing phone numbers.
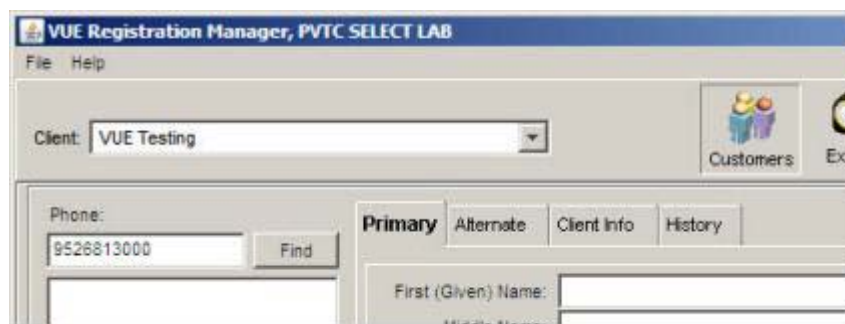
3. **Determine if further searching is necessary.**

   - If one record with a matching phone number is located, the candidate's name is added to the work list on the left side of the window. If more than one record matches your criteria, a list of candidates is displayed. Click the name of the candidate you want to work with and click the **Select** button. (You can remove a name from the work list at any time by selecting the name and clicking the **Remove** button at the bottom of the window.) Determine that the record you are using is the correct one by asking the candidate to verify his or her name and address.

- If more than five candidates are found, you need to narrow your search.

If you do not locate the candidate's record by entering his or her phone number, it is extremely important that you click the **Search** button and continue searching. Do not rely on the phone number search only.

Creating or editing a candidate's record

Use the following procedure to create a new candidate record or to edit a candidate's existing record in the Customers window in Registration Manager.

Once a candidate's record has been saved in Registration Manager, you cannot change the candidate's name.

1. **To create a new record, click the New button in the Customers window. To update an existing record, select the candidate's name in the work list on the left side of the Customers window and click the Edit button.**

If you are creating a new candidate record, the following message will appear on the screen:
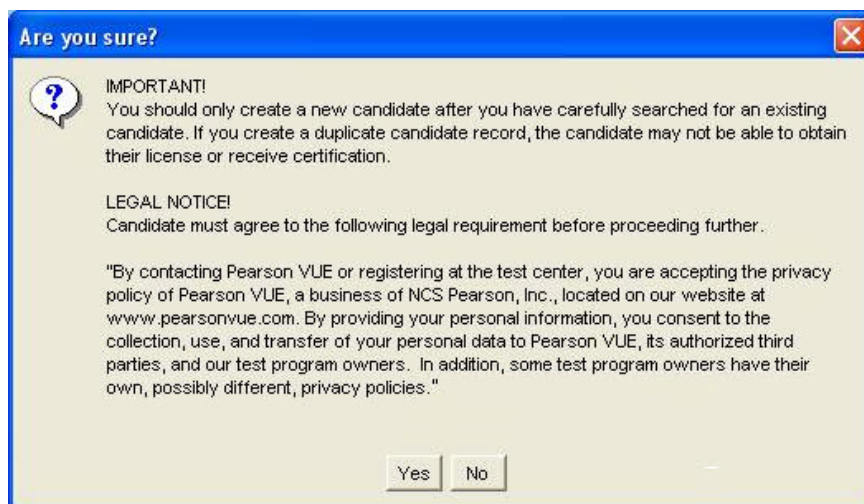
Make sure you have checked that the candidate does not already have a record in the database.

Also before creating the new record, the candidate **must** agree to the Consent Requirement shown in the message above. You may read the consent requirement to candidates or present a paper form of the consent requirement to the candidate to read themselves. The paper form of the consent requirement can be obtained from the Downloads page on the VSS web site. It's recommended that you laminate the paper form for reuse at the ITC.

If the candidate does not agree to this consent requirement or has any questions or concerns, click the **No** button and *do not* create the new record. Refer the candidate to contact Pearson VUE Contracts by phone or email.

Email: PearsonVUEContracts@pearson.com

Phone: 001 (952) 681-3918

Once you have verified that there is no existing record for the candidate and that the candidate agrees to the Consent Requirement, click the **Yes** button to continue.

2. **Enter or edit the candidate's demographic information by clicking the Primary tab.**

This tab lets you enter a candidate's name, address, email address and phone number. If you are editing an existing record, all information previously entered for the candidate is displayed in the fields. Otherwise, the fields are blank, as shown below.

- **First Name/Last Name/Middle Name**
  Enter the candidate's name *exactly* as he or she wants it to appear on all test-related documents and records. Tell the candidate that when he or she arrives to take the test, the name entered here must match the name on the identification the candidate provides (such as a driver's licence). Once the record has been saved, you cannot edit the candidate's name in this window, so be sure the name is spelled correctly before you save your work. Note that Registration Manager requires a first and last name; if the candidate does not have two names, you can type a full stop (.) in place of one of the names.

- **Salutation**
  If the candidate has a preferred way of being addressed, such as "Ms." or "Dr.", type the information in this field.

- **Email**
  Type the candidate's email address. Be sure to ask candidates for their email addresses. If an email address is provided, the candidate will quickly receive confirmation of test appointments by email, if he or she is selected as the Contact Person for the order. If no email address is provided, information is sent by another method, such as postal mail, which will take longer. Type the email address carefully and check it after you have typed it to be sure it is correct. If the address is incorrect, the candidate may not receive his or her appointment information.

- **Company**
  Type the candidate's company name, if he or she provides that information.

- **Address 1/Address 2/Address 3/City/State/Country**
  Use these fields to enter the candidate's complete address. This address should be the candidate's *permanent* mailing address. This is the address to which all test-related documents will be sent.

- **Postal Code**

- **Phone/Mobile/Fax**
  The area code (if applicable) must be typed in the same box as the phone number. Use the first box in these fields to type the country code, and use the Ext. box to type a phone extension number if applicable.

- **Type**
  Choose whether the candidate's address and phone number are for work or home.

3. **Click the Client Info tab and enter or change information specific to CITB.**

   ID
   An identification number is assigned to all testing candidates. If the candidate has previously registered through Pearson VUE with CITB, he or she may already have been assigned an ID, and the ID field will not be editable. If the candidate does not have an ID for CITB, you need to generate one by clicking the **Generate New ID** button.;

   If you do need to generate an ID for a candidate, please give the ID to the candidate so he or she has it for future reference.

4. **Click Save to confirm or Cancel to discard your changes.**

   When you save the record, Registration Manager checks that you have entered all information required by CITB. If any information is missing or incorrect, a message lets you know which fields you need to fill in or change.

Registering and scheduling a candidate

This section describes how to register and schedule a candidate for a test appointment, which involves the following tasks:

❖ Selecting the test.

❖ Choosing the appointment date and time the candidate wants.

Follow these steps to register and schedule a candidate:

1. **Find or create the record for the candidate you want to register.**

2. **Click the Exams button at the top of the Registration Manager window.**

Exams offered by the selected client/exam sponsor are listed here.

Listed here are the languages that the exam is offered in.

The name of the candidate being registered/scheduled is displayed here.

Information on the length of the selected exam is provided here.

3. **Select a test from the "What (Select an Exam and Language)" list on the left. Read the test title and number to the candidate and ask him or her to confirm that it is the correct test.**

4. **Select a language from the list on the right even if the test is only offered in one language (English).**

5. **Your ITC is automatically selected in the Where field.**

6. **Find an available appointment time at the ITC.**

To find a date and time for the test, type the date and time ranges you want to search in the **Dates from/through** and **Times from/to** fields. The default is tomorrow's date. If there are days of the week on which the candidate cannot take the test, uncheck the boxes next to those days.

You can enter dates in one of the following formats:

1/1/12
January 1, 2012
Jan 1, 2012

By default, dates for the next two days are entered in the date fields. Instead of typing a date, you can quickly change it by clicking in the field and pressing the up or down arrow key on the keyboard.

You can enter times in one of the following formats:

8:30 am*
4:30 pm*
16:00

*You must specify a.m. or p.m. If you do not, a.m. is assumed.

By default, a time range of 6a.m. to 10p.m. is entered. Instead of typing a time, you can quickly change it by clicking in the field and pressing the up or down arrow key on the keyboard.

7. **Click the Find Times button.**

A list of available appointment dates and times appears in the lower right corner of the **When** section of the window.
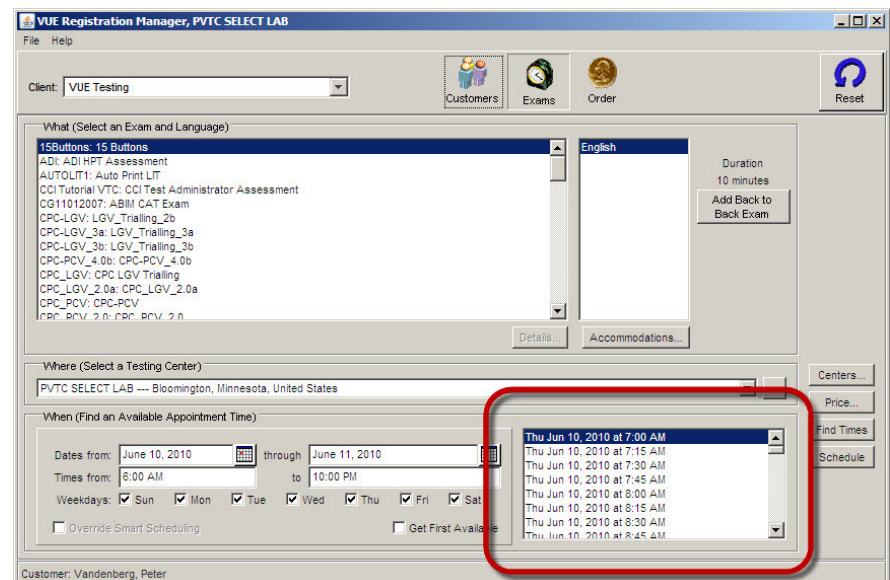
8. **To schedule an appointment, click the desired time in the list and click the Schedule button.**

Entering payment information and completing the order

After you have registered and scheduled the candidate, clicking the **Schedule** button displays the **Order** window in Registration Manager. This window allows you to do the following:

❖ Review the registration and scheduling information.

❖ View accommodations (special assistance) information.

❖ Select a contact person for the order.

❖ Enter "discount" payment information.

❖ Save an order and generate an order number.

Follow these steps to complete an order:

1. **Register and schedule a candidate for a test appointment, and click the Schedule button in the Exams window.**

   The **Order** window is displayed.

2. **Check that the test appointment is correct and click *CITB-CSkills ITC Zero Discount.* Ensure the payment type is none and save.**

   The ITC collects the test fee from the candidate on the day of the test. Once a test has been completed, CITB will invoice the ITC for this payment, weekly in arrears.

   The Order Items area lists every item included on the order. To see details about an item, click it in the list; the information displays in the Item Review area. To delete an item from the order, select it and click the **Remove** button.

3. **If "See Accommodations" appears next to the candidate's name in the Item Review area, you can click the Accommodations button to view information about the accommodation.**

4. **Choose a Contact, if necessary.**

   The contact receives the confirmation letter for the order and is the person who is contacted if there are any problems with the order. If you are registering and scheduling one person, that person is the contact.

5. **Before saving the order, confirm the order information with the candidate.**

6. **Click the Save button.**

   When you click the **Save** button, Registration Manager begins processing the order.

- The testing system allows Pearson VUE to prevent certain candidate registrations from being made, this is referred to as *candidate blocking.* For example, CITB might ask Pearson VUE to prevent a certain candidate from scheduling test appointments because of cheating incidents that have occurred.

7. **After a few seconds, the Order Confirmation window displays. Provide the candidate with the Order Number at the top of the window. Thank the candidate and remind him or her that an appointment confirmation letter will be sent to the contact listed on the order.**
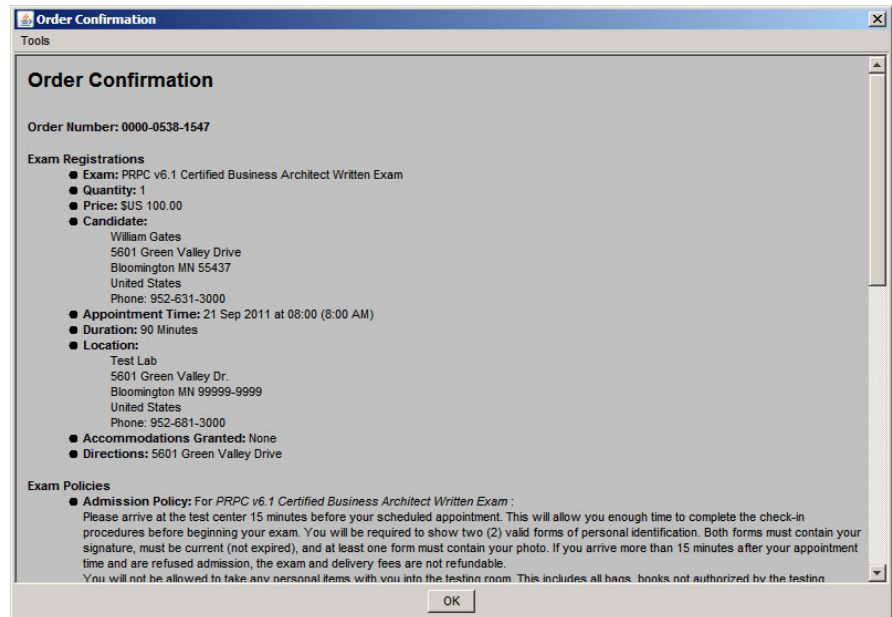
The order number indicates that the order has been saved.

Appointment confirmation letters are initially sent to candidates by *either* email or mail. When an appointment is scheduled or changed in Registration Manager, the system checks whether or not the candidate provided an email address; if so, the letter is emailed. If there is no email address in the candidate's record, the letter is sent by mail. If necessary, you can request for a letter to be resent.

After you save an order and click **OK** in the message box shown above, you automatically return to the **Customers** window in Registration Manager, and the fields are blank. If you want to redisplay the last record with which you were working, click the **Get Last** button on the **Customers** window.

Using the History Tab

The History tab available on the Customers window in Registration Manager allows you to do the following:

❖ Quickly locate a candidate's record, if you know the candidate's order number or registration ID number.

❖ View a variety of registration information, such as all of a candidate's active registrations or any registrations the candidate has cancelled.

❖ View accommodations (special assistance) information.

❖ Reschedule or cancel an appointment.

❖ Resend appointment confirmation letters to candidates.

Follow these steps to use the History tab:

1. **Locate the candidate's record.**

   - If you do not have an order number or registration ID number for the candidate, follow the usual procedures to locate his or her record.

   - If the candidate has already scheduled a test appointment, you can locate his or her record by entering the order number noted in the confirmation letter the candidate receives from Pearson VUE or the registration ID number (if you know it). These options do not require you to first select a candidate.

     ❏ The **Exam History**, **Using Order No** option allows you to locate all registrations on an order by entering the order number.

     ❏ The **Exam History**, **Using Reg ID** option allows you to find a specific registration by entering its registration ID.

 | Exam Registrations, Active ▼ |
     | --- |
     | **Exam Registrations, Active** |
     | Exam Registrations, Canceled |
     | Exam History |
     | Exam History, Using Order No |
     | Exam History, Using Reg ID |
     | Exam Eligibility Letters |

     When you choose one of these options from the **Show** field, either an **Order No** or a **Reg ID** field becomes available next to the field. Type the order number or registration ID in the field, and click the **Find** button to locate the information. A message displays if the number you entered is not valid.

2. **Click the History tab if it is not already displayed. Choose which information you want to display, if necessary, and select a registration.**

   - If you entered the candidate's order number or registration ID number in step 1, registration information is displayed on the bottom half of the window as shown below.

   - If registration information is not displayed, click the **Show** field and choose whether to display the candidate's active registrations (all test registrations that have not been delivered), cancelled registrations only or test history (all registrations).

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- When the registrations are listed, click one to display detailed information about it in the Details area at the bottom of the window. This area shows test information, registration ID number and order number, test appointment information, payment information and the state of the registration (such as if the test has been delivered).

3. Use the buttons on the right side of the window to perform the desired task.
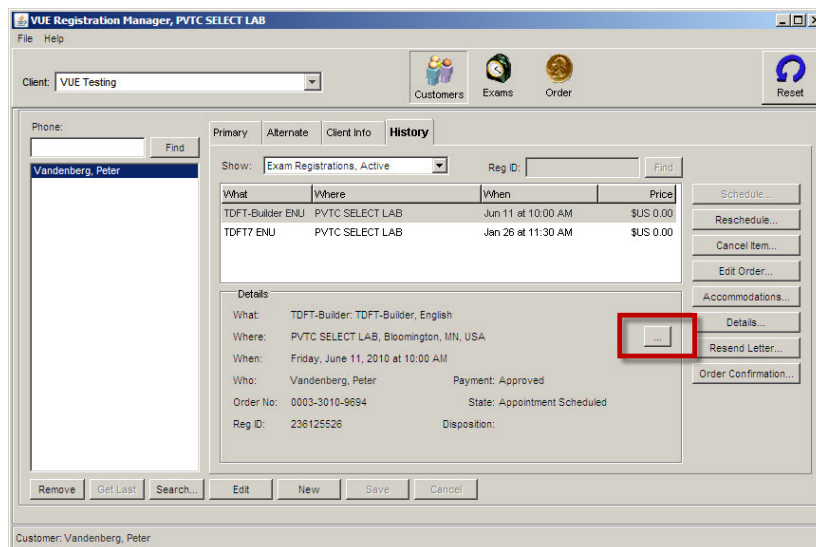
- ❖ Use the **Reschedule** button to change a test appointment.

- ❖ Use the **Cancel Item** button to cancel an appointment.

- ❖ Use the **Accommodations** button in the Customer Window to view accommodations/special assistance associated with a registration.

- ❖ Click the **Resend Letter** button to resend a copy of the appointment confirmation letter to a candidate.

Rescheduling a test appointment

For best practice, candidates are asked to reschedule at least one business day before the test appointment.

- ❖ ITC's can reschedule a test appointment, at no additional charge, *up to the time of the appointment*. If you allow candidates to reschedule on the day of the test, require at least a half-hour's notice to allow yourself time to process the change in Registration Manager.

- ❖ You cannot reschedule a test if the original appointment date and time has already passed. If the candidate does not reschedule before the appointment time, he or she could be billed for the test at the ITC's discretion. However, CITB will only invoice for tests that have been taken, no invoice will be raised for candidate no-shows.

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❖   When rescheduling, you can select a different test date and/or time. To change which test the candidate is going to take, you must cancel the original registration and create a new one.

❖   If your ITC is unable to deliver a scheduled test for some unforeseen reason, such as hardware problems, you should try to reschedule the candidate's appointment at the earliest convenience at your ITC. (If you are unable to access your ITC's schedule, call VSS for assistance in rescheduling).

Follow these steps to reschedule a candidate's test appointment:

1.   Locate the candidate's record.

If the candidate has an appointment confirmation letter, you can locate his or her record by entering the order number noted in the letter or by entering the registration ID, if you know it. Otherwise, follow the usual procedures to search for the candidate's record.

2.   Click the History tab. Select the information you want to display from the Show drop-down box, if necessary.

3.   Select the appointment the candidate wants to reschedule.

Detailed information about the registration is displayed at the bottom of the window.

4.   Click the Reschedule button.

The **Reschedule Appointment** window appears. Then follow the same process for booking a test.

5. **Your ITC is automatically selected in the Where field.**

6. **To find a date and time for the test, type the date and time ranges you want to search in the Dates from/through and Times from/to fields.** The default is tomorrow's date. If there are days of the week on which the candidate cannot take the test, uncheck the boxes next to those days.

7. **Click the Find Times button.**

8. **Select the date and time the candidate wants, and then click the Schedule button.**

9. **Click the Save button to save the selected appointment.**

    The **History** tab shows information about the rescheduled appointment.

Cancelling a test appointment

Generally, candidates are asked to cancel at least one business day before the test appointment.

❖ ITC's may at no additional charge, cancel an appointment *up to the time of the appointment*. If you allow candidates to cancel on the day of the test, require at least a half-hour's notice to allow yourself time to process the change in Registration Manager.

❖ You cannot cancel an appointment if the original appointment date and time has already passed.

❖ If your ITC is unable to deliver a scheduled test for some unforeseen reason, such as hardware problems, you should try to reschedule the candidate's appointment at the earliest convenience at your ITC. (If you are unable to access your ITCs schedule, call VSS for assistance in rescheduling). In the unlikely instance that you are unable to find a new appointment time that is satisfactory to the candidate, cancel the appointment and contact VSS; VSS will try to reschedule the candidate at a different testing location. You are not required to contact VSS if the *candidate* initiates a cancellation.

Follow these steps to cancel a candidate's test appointment:

1. **Locate the candidate's record.**

   If the candidate has an appointment confirmation letter, you can locate his or her record by entering the order number noted in the letter or by entering the registration ID, if you know it. Otherwise, follow the usual procedures to search for the candidate's record.

   2.   Click the History tab. Select the information you want to display from the Show drop-down box, if necessary.
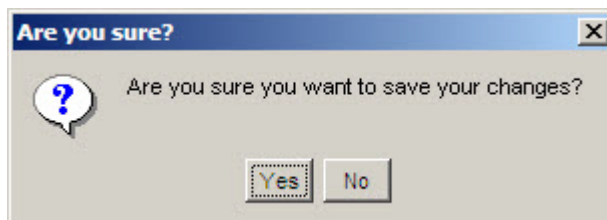

3. **Select the registration the candidate wants to cancel.**

   Detailed information about the registration is displayed at the bottom of the window.

4. **Click the Cancel Item button.**

   The Cancel Item window lists information about the selected test registration.

5. **Click the Save button to cancel the test. When a confirmation message appears, click Yes.**

Scheduling test retakes

Candidates cannot retake a test less than 48 hours after the original test was taken. This is to ensure that the candidate has adequate time to revise and prepare for the re-test. This retake policy is automatically enforced by Registration Manager.

Viewing accommodations information

You can quickly view details about an accommodation (special assistance) in Registration Manager as described below. You can also view accommodation information on the Schedule window in Admissions Manager.

1. **Select the test for which you want to view accommodations.**

   - **Before an order has been saved**

   Before you save an order, if an automatic accommodation has been granted for an appointment, a "See Accommodations" message appears next to the candidate's name on the Order window as shown below. (You must first select the test in the Order Items list.)

This text next to the candidate's name indicates that an accommodation has been granted for the selected exam.

- **After an order has been saved**

After an order has been saved, you can view all accommodations that are associated with it by using Registration Manager. You might need to do this if, for example, a candidate calls to verify that he or she was granted an accommodation for a specific test. (ITCs cannot use Registration Manager to add, change or revoke accommodations for saved registrations; those tasks can only be done through the Call Centre.)

Select a candidate and CITB in Registration Manager and click the History tab on the Candidates window. (If you know the Order Number or Registration ID, you do not need to first select a candidate.) Choose which tests you want to view from the **Show** field and select a registration in the window.

2. **Click the Accommodations button.**

    The Accommodations window lists all accommodations granted for the registration. Information about the selected registration and candidate is displayed at the top of the window. The Requested area lists any accommodations that were granted

3. **To see more information about the accommodation, select the accommodation in the window and click the Review button.**

    The Review Accommodation window displays details about the accommodation, including who granted it and when it was granted.

4. **Click the Close buttons to close the windows.**

Requesting and resending confirmation letters and other candidate correspondences

Registration Manager includes a **Resend Letter** feature that allows you to request that a letter be resent to a candidate by email. This includes order confirmation, reschedule and cancellation. For example, if a candidate calls and says he or she did not receive an order confirmation letter or lost it, you can check when and how the letter was sent and request that the letter be resent to the candidate.

Some points about resending are listed below, followed by a resending procedure.

❖ Appointment confirmation letters are initially sent to candidates by *either* email or post. When an appointment is scheduled or changed in Registration Manager, the system checks whether or not the candidate provided an email address; if so, the letter is emailed. If the candidate did not provide an email address, the letter is sent by post.

❖ You can only request that a letter be resent if the letter has previously been sent to the candidate.

❖ When you request that a letter be resent, the resending method is restricted as follows:

- **ITCs can request that a letter be resent by email only.** If a candidate needs the letter sent by post, please ask him or her to contact the Pearson VUE Call Centre for assistance.

- Pearson VUE does not support faxing.

❖ After successfully requesting that a letter be resent in Registration Manager, candidates and test administrators should allow 24 hours to receive the letter by email.

Follow these steps to request that a candidate's letter be resent by email:

1. **Locate the candidate's record in Registration Manager.**

2. **Click the History tab, and then choose "Exam Registrations, Active" from the "Show" field to display the candidate's registrations.**
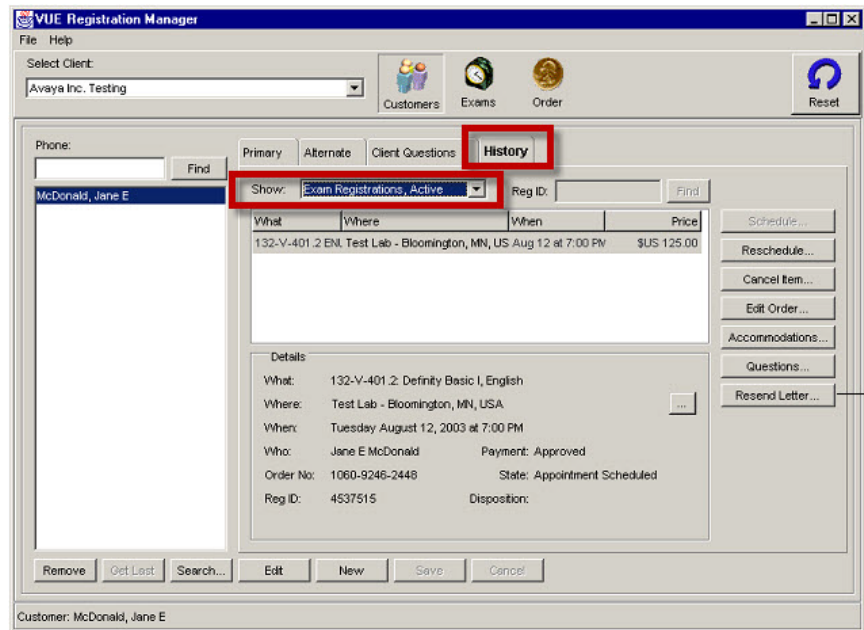
3. **Select the registration that requires the letter to be resent.**

4. **Click the Resend Letter button on the right side of the window.**
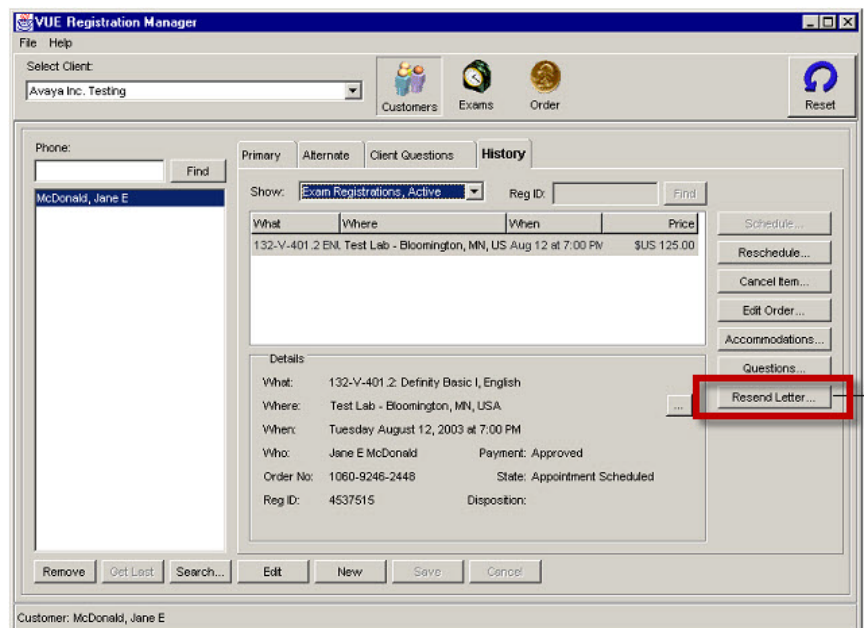
The **Resend Letter** window is displayed, as shown in the following illustration. The **Letters that have been sent** portion in upper part of the window lists all letters that have *been previously sent* or *are in the process of being sent* to the candidate.

The list provides the following information about each letter/correspondence:

- **Letter** -- The type of letter/correspondence.

- **Method Sent** -- The method in which the correspondence was sent and its status. Listed below are possible methods/statuses you will see in this column:

  o **Email failed**: The system failed to send the email.

  o **Email fulfilled**: The system successfully sent the email.

  o **Print New**: A new request for a print letter.

  o **Print Batched**: The request for the print letter was put in the batch to be sent by the print vendor.

  o **Print Submitted**: The request for the print letter was submitted to the print vendor.

  o **Print Fulfilled**: The print letter was sent to the candidate.

  o **Print Failed**: The print vendor was unable to generate and send the print letter.

  o **Print Deadline Passed**: The print letter was to be sent, but the time between when the registration is created or when the appointment is rescheduled and the actual test delivery date is less than the imposed print deadline.

- **Time Sent** -- The time and date for when the letter was last changed. For example, the time could represent the time at which a request to send the letter was submitted to the Pearson VUE server or the time at which the document was actually sent.

- **System** -- The system in which the letter is set up and generated. Either "Correspondence Engine" or "App Server" will display.

The list also indicates how and when each letter was sent ("Printed" or "Print Fulfilled" means that the letter was printed and sent to the candidate via ground mail).

ITCs can request that a letter be resent to a candidate by email only. If a candidate needs the letter sent by post, please ask him or her to contact a Pearson VUE Call Centre for assistance.

5. **Select the Letter that needs to be resent from the "Letters that have been sent" portion of the window.**

6. **Choose "Email" from the Method drop-down box.**

The letter will be sent to the person listed in the Recipient field; note that this will be the person selected as the contact for the order, which may not be the candidate.

7. **Type in a different email address in the Email field, if necessary.**

If the letter is being resent by email, you can type in a different email address from the one that is saved in the candidate's record. The email address you type in this field is not saved with the candidate's record.

8. **Click the "Resend" button.**

The request for the resend is sent to the Pearson VUE server, and the following message appears. The letter will be emailed within 24 hours.

Amend candidate test type

Please also be aware that if a candidate wishes to change their test type or any other test details, they are able to do this before the test is launched (this cannot be changed after the candidate has been admitted for the test). This change should be made at the ITC free of charge and RMA re-run once the change has been made to the system.

Checking in Candidates

This chapter describes the procedures that must be followed when candidates arrive at the ITC to take a test.

Candidate Check-In List

The Candidate Check-In List provides all check-in procedures. The VSS web site contains a copy of the list that you can duplicate and keep at the front desk for easy reference.
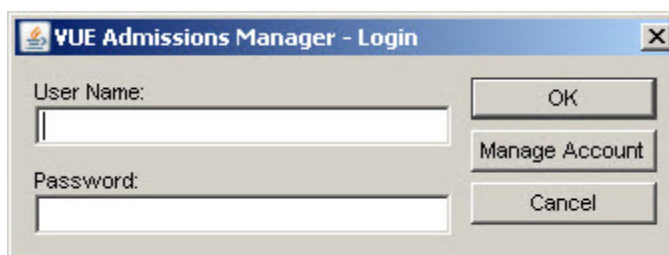
Opening Admissions Manager

The Admissions process involves using the **Admissions Manager** application. Follow these steps to open Admissions Manager:

1. **Click the Start button on the Windows taskbar and choose All Programs | VUE Applications | Admissions Manager.**

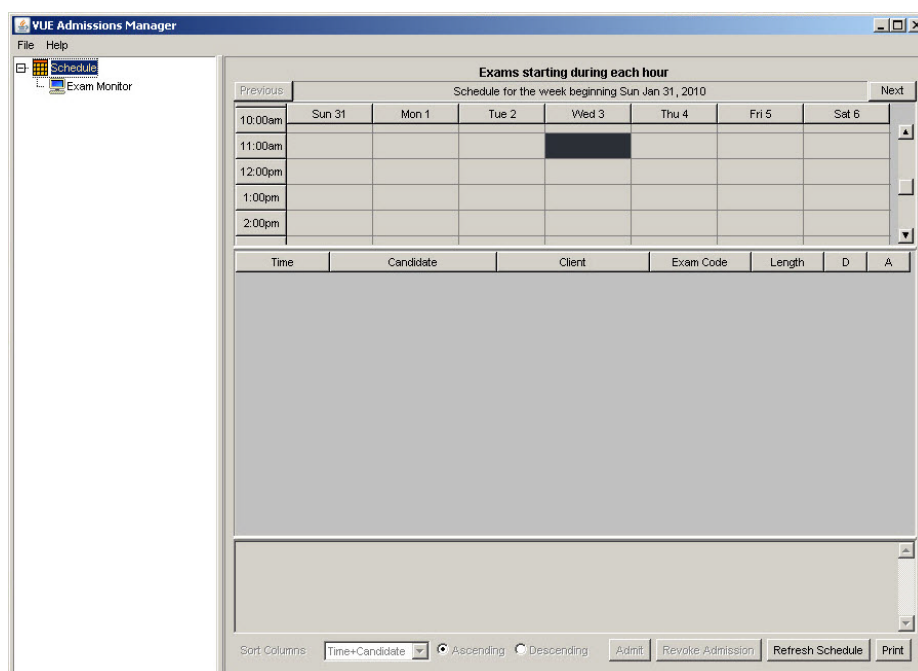   An introductory screen appears, followed by the Login dialog box which is shown below.
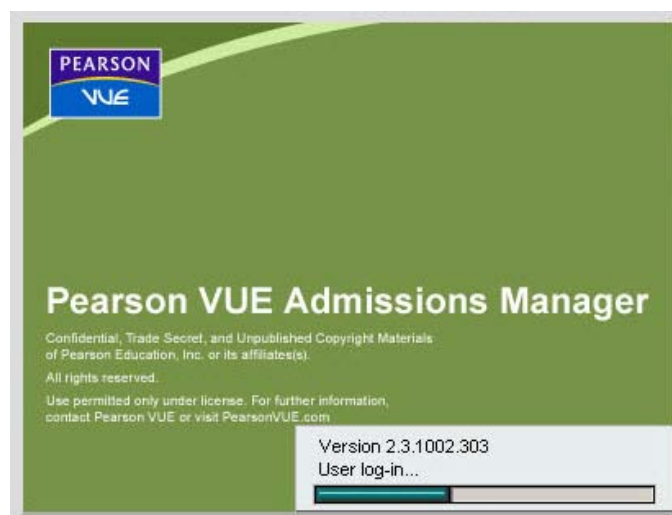
If you need to change/update your security questions or password, you may click the **Manage Account** button after you enter your user name and password. You will be able to change your password and/or security questions and answers. Click **Save & Close** to save your changes or **Cancel** to cancel.

2. **In the Login dialog box, type your username and password for the Pearson VUE applications, and then click OK.**

The Admissions Manager window appears. Whenever you open Admissions Manager, the **Schedule** icon in the left pane is selected, and the schedule for the current date is displayed on the right, as shown below.

You must have the **May admit candidates and deliver exams** permission assigned to your user account in order to access the Admissions Manager application.

Greeting candidates and verifying appointments, and accommodations

Candidates are asked to arrive at the ITC at least 15 minutes before the test appointment time. Candidates should be checked in to the test centre in the order that they arrive.

Follow these steps when a candidate arrives to take a test:

1. **Greet and welcome the candidate when he or she enters the ITC.**

   - Candidates are NOT permitted to bring food or beverages into the test room. They should store personal belongings inside the individual, secure lockers provided and access them before/after their test. Test administrators are permitted to use their discretion regarding a candidate eating in the waiting room.

   - If you cannot process the candidate immediately, indicate where the candidate should wait, and advise that you will process candidates in the order in which they arrived.

2. **Ask for the candidate's name and the name of the test he or she wants to take. Verify that the candidate's appointment is listed on your ITCs schedule and that the test is deliverable.**

   To display the schedule, log in to Admissions Manager and click the **Schedule** icon in the left pane. The schedule opens to the current date. Click the test appointment time on the schedule to display a list of candidates scheduled at that time.

   Sometimes candidates want to take tests before the scheduled test appointment time. The best way to handle this in order to ensure there are no problems and that the candidate takes the correct version of the test is to reschedule the candidate's appointment for the actual time at which he or she will take the test, and then run a manual RMA.

   Be sure the candidate's name is listed and that the D column is checked, indicating that the test is deliverable (ready for the candidate to take). If the candidate's name does not appear on the schedule, check your ITCs schedule on the VSS web site. Since that schedule is valid regardless of whether or not RMA has been run, it will list appointments that were added since RMA last ran. **You may need to run RMA manually if the D column on the schedule is not checked.**

3. **Note if the candidate has been approved for any accommodations (special assistance).**

    If an "A" appears in the A column on the schedule, the candidate has been approved for an accommodation / special assistance. Click the name on the schedule and check the bottom window to see more information about the accommodations that have been granted. (You may need to scroll to the bottom of the window in order to see the accommodations information.)

    - Refer to the Exam Sponsor Guide for information on specific accommodations requirements. Candidates who require additional support such as a reader/recorder, an interpreter or sign language need to take their test at a standard Pearson VUE test centre by calling the Special Assistance booking line on 0344 994 4491.

Handling no shows and late arrivals

In general, you are required to seat a candidate for a test as long as he or she arrives on the date the test has been scheduled for. It is important to check your ITC's schedule often -- if a candidate does not arrive for the test, it could be because he or she just recently cancelled.

❖ If a candidate arrives within 15 minutes after the scheduled appointment time, follow the normal procedures for checking in the candidate.

❖ If a candidate arrives *within 15 minutes* of the scheduled appointment time and you are not able to seat the candidate for the test, you should offer him or her the opportunity to reschedule the test. Because the appointment time has already passed, this will become a no-show and the candidate will need to re-book their test.

❖ If a candidate arrives *more than 15 minutes after* the scheduled appointment time, the ITC should try to accommodate a late arrival whenever possible. Ultimately, it is up to the discretion of the ITC as to whether or not the candidate may still take the test (either immediately or later the same day). Be sure your ITC can accommodate him or her without interfering with other tests that are scheduled that day. File an Incident Report if you accommodate a candidate who was late.

❖ If you are unable to accommodate a late-arriving candidate, inform the candidate that he or she is too late to test today and will need to re-register for the test. The candidate's results will be automatically entered in the testing system as "no show."

❖ If a candidate does not arrive for a test at all, the Pearson VUE Testing System™ handles the situation automatically and lists the candidate as a "no show." You do not need to take any further action.

Handling walk-in candidates

A candidate may arrive at your ITC and ask to take a test on that day, although he or she has not scheduled an appointment. You can choose to admit walk-in candidates if all of the following are true:

❖ You can fit the candidate into your ITC's appointments.

❖ Schedule without affecting other tests

❖ The candidate has the proper forms of identification.

❖ The candidate is willing to wait 10 to 15 minutes for the test to be prepared.

Follow these steps to handle walk-in candidates:

1. **Before assisting the walk-in candidate, check in and seat all scheduled candidates in the test room.**

2. **Schedule the candidate for an appointment on the current day.**

   When a same-day appointment is scheduled, the Application Wrapper will automatically run RMA so that the files necessary for the candidate's test are downloaded. After making the appointment, refresh the schedule in Admissions Manager to see if the test is prepared. If the test is not prepared, verify that the Application Wrapper ran RMA and that it is working properly by checking the RMA connection log on VSS. If the Application Wrapper hasn't run RMA, you may run RMA manually to prepare the same-day appointment, and then refresh the schedule in Admissions Manager.

   If the test does not appear on the schedule in Admissions Manager after running RMA manually and refreshing the schedule, you must contact VSS for assistance immediately.

3. **When the candidate's test is marked deliverable in the Admissions Manager Schedule window, check in the candidate as you normally would.**

Admission process

Admissions Manager is a tool that test administrators use to check in candidates for tests. All ITCs are required to use the Admissions Manager application to admit candidates for tests. This requirement helps ensure that all test administrators and all ITCs follow a standard set of steps when admitting candidates. Admissions Manager gives you detailed information and reminders on the computer screen during the admission process.

You must perform all steps in the admission process for every candidate, even if you know the candidate (such as if the candidate has previously taken training at or tested at your ITC).

❖ You must verify the candidate's IDs as you always do.

❖ Admissions data must be collected via the test log, capturing a candidate's photograph and digital signature. If a candidate refuses to provide any of these items, he or she cannot take the test and you must file an Incident Report.

❖ If there are identification issues, such as if a candidate's digital signature does not match the signature on the ID(s). Ask the candidate to sign the digital pad a second time. If the signatures still do not match, contact the Call Centre for further instructions before turning away a candidate because of one of these issues.

Each step in the admission process is clearly displayed in the Admissions Manager windows, along with brief instructions. Steps are automatically checked off when you click the **Next** button to indicate that you followed the instructions and completed the step. After completing all steps for a candidate, you simply click an **Admit** button which changes the candidate's status in the system to "Admitted."

Please note that a candidate's test *cannot be started* in Delivery Manager unless the candidate has first been admitted through Admissions Manager.

You need to process every candidate through Admissions Manager, regardless of which test a candidate is taking.

Basic Admission Steps _with_ admissions data collection required

1. Distribute candidate rules agreement and fill in the test log

2. Request appropriate forms of identification (ID)

3. Check the IDs

4. Capture signature and verify that signatures match

5. Check if the candidate is under 16 years of age

6. Capture photograph

7. Show the candidate where to store personal belongings

8. Inform the candidate of the optional tutorial and survey

These are the basic steps used in Admissions Manager.

Basic Admission Steps _with_ Admissions Data Collection Required

Admission Step (left pane)	Instructions (right pane)
1. Distribute candidate rules agreement and fill in test log	• Ask candidate to read the CITB Candidate Rules Agreement and return the document to you. • Complete the Test Log for each testing candidate. (All fields must be fully completed before the candidate leaves the ITC)

| Admission Step (left pane)	Instructions (right pane)
2. Request appropriate forms of identification (ID)	• A candidate must provide 1 form of Primary ID containing a photograph and signature. If they do not have the required form of Primary ID they may present 2 forms of Secondary ID; one with a recent photograph and printed full name and one with a signature and printed full name. Some ID bears both the photo and signature but a second form of ID will also be required; these are classed as Additional ID and will require 1 form of Secondary ID to support them (see client chapter for accepted ID).
3. Check IDs	Ensure that ID presented meets Client Chapter guidelines. • Check that ID/IDs are valid (not expired). • Verify that candidate's name on presented ID/IDs matches candidate's name on schedule. • If the names do not match, call the Customer Service Centre to see if any changes are required prior to test delivery (see CITB client chapter for detailed information on name matching). • Verify that photograph on presented ID is the candidate. • Verify candidate's address • Note: If IDs are unacceptable, click Cancel to end the admission process. Do not seat the candidate for the test. Submit an Incident Report.
4. Capture signature and verify that signatures match	• Click the Capture button. • Ask candidate to sign signature pad with pen provided. Tell candidate not to write too small. • Click Accept. • Check that candidate's signature matches signature on both IDs. • **Return IDs to candidate.** • If signature device is not working properly, please use the backup signature device if available, if a backup is unavailable or does not solve the issue do not seat the candidate for the test Note: If signatures do not match, click Cancel to end the admission process. Do not seat the candidate for the test. Submit an Incident Report.
5. Check if the candidate is under 16 years of age	• If so, request the signed parental consent form and ensure that they have been accompanied by an appropriate adult and produced the correct ID, as described previously. Check the documentation and ask the accompanying adult to sign the visitor log. Refer to the CITB client chapter for more information on this process. • If the testing candidate has a completed parental consent form, but they are not accompanied by an appropriate adult, do not seat the candidate for the test.
6. Capture photograph	• Seat candidate in designated chair. • Click the Capture button. Click OK after photo displays on screen. • If camera device is not working properly, please use the backup camera device if available, if a backup is unavailable or does not solve the issue do not seat the candidate for the test

Admission Step (left pane)	Instructions (right pane)
	• Submit an Incident Report.
7. Show candidate where to store belongings	• Have candidate store belongings in the secure lockers provided. Note: If candidate refuses to store belongings, click Cancel to end the admission process. Do not seat the candidate for the test. Submit an Incident Report.
8.Inform the candidate of optional tutorial and survey	• Inform the candidate that there is an optional 15 minute tutorial at the start of the test and an optional customer satisfaction survey at the end of the test. For the CPCS renewal test there is an online optional survey which can be completed after the test session. Available at www.surveymonkey.com/s/cpcsrt

Requesting/checking IDs and distributing Candidate Rules Agreement

When you take a break, go to lunch, end the work day or *invoice the ITC for any period of time*, be sure to log out of *all* applications you have logged in to. The test administrator who is currently registering, invigilating and/or administering tests must log into the applications with their personal username and password.

Follow these steps to begin the admission process for a candidate:

1. **Select the candidate's name on the schedule. Be sure the candidate's name is selected in the Schedule window in Admissions Manager as shown below.**
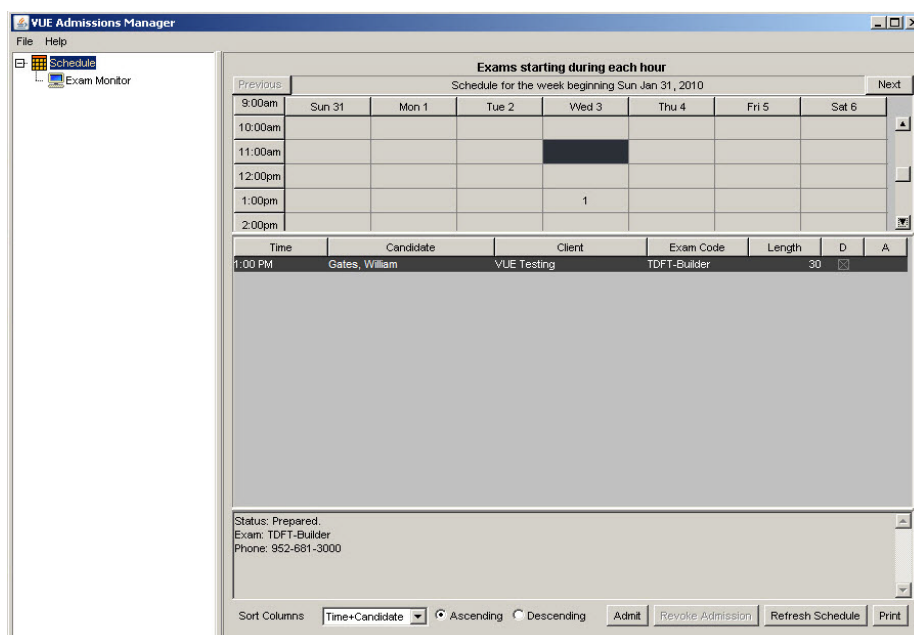
2. **Click the Admit button.**

The admission steps display on the left side of the screen.

The following buttons appear at the bottom of every admission window:

- **Cancel** -- Exits the admission process. A message asks if you are sure you want to cancel. Clicking **Yes** closes Admissions Manager and returns to the Admissions Manager Schedule window without admitting the candidate. To admit the candidate, you would need to start the admission process from the beginning.

- **Back** -- Returns to the previous step in the admission process.

- **Next** -- Marks the current step as completed and moves to the next step in the admission process.

3. **Ask the candidate for their ID, and then click the Next button.**

A CITB candidate must provide one form of Primary ID containing a photograph and signature.

If they do not have the required form of Primary ID they may present two forms of Secondary ID. This must be one ID from List A and one ID from List B (two from List A or two from List B is not acceptable). One type of secondary ID should have a photo and one should have a signature.

You may NOT seat a candidate for a test if he or she does not have the appropriate forms of identification. Please see an acceptable list of ID below:

PRIMARY ID	
Present one of the following:	
Passport	A valid passport of any nationality with a photograph of the candidate and their signature – must be no more than 6 months out of date.
Photo Card Driving Licence	A valid UK only driving licence with a photograph of the candidate and their signature – must be no more than 6 months out of date.
SECONDARY ID – one from List A and one from List B required	
Both should be current and valid forms of ID.	
List A	
Present one of the following:	
Non UK Driving Licence	Showing a photograph and printed full name – must be no more than 6 months out of date.
Work ID Card	Showing a photograph and printed full name – must be no more than 6 months out of date.
EU Country ID Card	Showing a photograph and printed full name – must be no more than 6 months out of date.
CITB Scheme Card	Showing a photograph and printed initial and surname – must be no more than six months out of date. Acceptable CITB scheme cards include CSCS, CPCS, CISRS and CCDO.
Student ID Card	Showing a photograph and candidate initial and surname, as well as the year of study (e.g. 2012/2013) and name of the institution of study – must be no more than 6 months out of date.
Citizen Card	Showing a photograph and printed full name – must be no more than 6 months out of date.
Trade Union Card	A current card with a photograph of the candidate and their signature – must be no more than 6 months out of date.
British Armed Forces Card	Showing a photograph and for employee of Armed Forces only (not dependant or spouse) – must be no more than 6 months out of date.
Proof of Age Card	Cards issued nationally in the UK by the Portman Group. Showing a photograph of the candidate and their signature.
Young Scots Card	Showing a photograph, printed full name and DOB – must be no more than 6 months out of date.

List B	
Present one of the following:	
Credit Card	Showing the candidate's name (initial and surname is acceptable) and signature and bank logo.
Debit Card	Showing the candidate's name (initial and surname is acceptable) and signature and bank logo.
Paper Driving Licence	Showing the candidate's full name and signature.
UK Travel Document	Showing a photograph, full name and signature – must be no more than 6 months out of date.
Inland Revenue Card	Showing a photograph, printed initial and surname and signature of the candidate – must be no more than 6 months out of date.
National Insurance Card	Showing the candidate's full name. An official HMRC letter or addressed payslip with NI number can be accepted if the card has been lost / not issued.
B79 Notification of Discharge Letter	Showing the candidate's full name and signature.
Bank Statement	Within the last 3 months and including printed initial and surname and home address. **This must match the address given at the time of booking.**
Building Society Passbook	Showing the candidate's full name / initial and surname and address. **This must match the address given at the time of booking.**
Cheque Guarantee Card	Showing the candidate's full name / initial and surname and signature.
OTHER ID	
Waiver Form	With a countersigned photograph of the candidate and their signature – follow the guidelines on the waiver form about two **additional ID** requirements and instructions.
Under 16 Confirmation of Identification Form	With a countersigned photograph of the candidate from the school or college that they attend. Only to be used alongside the parental consent from, if the candidate is under the age of 16 and does not have required photographic identification.

A waiver form should only be used if no other form of primary or secondary ID can be provided.

After you click the **Next** button, the following window is displayed. Since you have performed step 1, it is now checked off in the list of steps. Step 2 in the admission process is now highlighted in bold, and its instructions are displayed on the right as shown below.

4. **Give the candidate a copy of the ITC Candidate Rules Agreement.**

Each candidate must read the Agreement and sign the epad to indicate that he or she has read and agrees to abide by the rules.

The Candidate Rules Agreement is available for download on the VSS web site.

5. **The candidate can review the Agreement while you continue with the admission process, so click the Next button to move to the next step.**

After you click the **Next** button, step 3 in the admission process is now highlighted in bold, and its instructions are displayed on the right as shown below.

6. **Check the candidate's identification.**

Each candidate must have the proper forms of identification.

- Check that the ID(s) are valid (not expired).

- Verify that the candidate's name on the ID(s) matches the candidate's name shown on the screen or are in accordance with the name matching guidelines. Refer to the Name Matching Guidelines on the Downloads page in VSS for assistance.

- Verify that the photograph on the primary ID looks like the candidate. Ensure that the photo is not pasted or altered.

- You may NOT seat a candidate for a test if he or she does not have the appropriate forms of identification, the name on the ID(s) do not match the name on the schedule, or the photograph on the primary ID does not look like the candidate.

- A photocopy of ID must always be taken and kept on file with the test logs for a minimum of 2 years. (Bank cards and military ID are the only exception and MUST not be copied).

7. **Click the Next button if you determine that the IDs are acceptable. Retain the IDs for use later in the admission process.**

Acceptable forms of ID

All candidate identification **must be valid** (not expired) and must be an original document (not a photocopy or a fax).

Name-matching guidelines

The test administrator must check that the candidate's name on the ID(s) match the candidate's name on the ITC schedule. Use the **Standard Name Matching Guidelines** located on the Downloads page in VSS.

Often names do not match because a candidate has recently been married or divorced. Typically for the candidate to be admitted, the candidate must present a marriage licence or divorce decree to supplement the identification.

If a candidate claims to have changed his or her name recently but the change is not reflected in Admissions Manager, look up the candidate's record in Registration Manager to see if the name has been changed there. If the name matches in Registration Manager, continue admitting the candidate.

Capturing and verifying signature

It is a test requirement that the candidate's digital signature is obtained. If a signature cannot be taken for the candidate, they will not be allowed to test.

If you have questions about a candidate's signature and are not sure what to do, refer to the exam sponsor chapter for guidelines. **If any issue or problem related to the candidate's signature arises, you need to file an Incident Report.**

Follow these steps to capture a candidate's signature:

> If the candidate has previously taken the test, a signature may already exist for the candidate in the database; if so, it is already displayed in the Admissions Manager window. Check that the displayed signature matches the one on the candidate's ID. You still need to capture a new signature, as outlined in this section, and the new signature will replace the existing one in the database. If the existing signature and the new signature do NOT appear to match, file an Incident Report immediately.

1. **Once the IntegriSign Signature Capture Pad window appears, ask the candidate to sign the signature pad with the attached stylus (pen).**

    The **IntegriSign Signature Capture Pad** window should automatically appear after clicking **Next** in the previous Admission Step. If not, click the **Capture** button located on the **Admissions Manager** window.
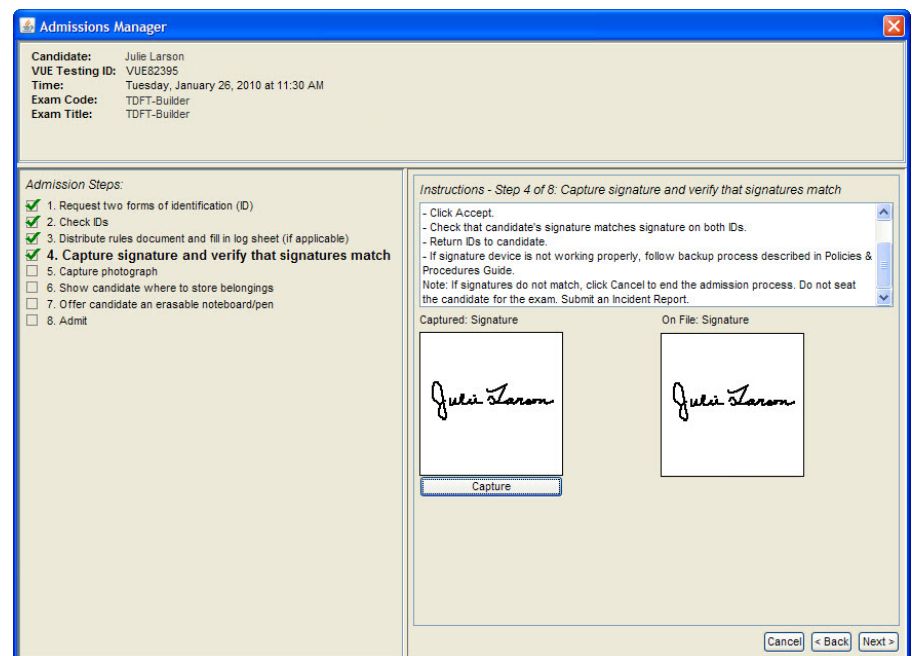
Do not allow anyone to write on the pad with any other type of pen.

As the candidate writes on the pad, the signature will appear in the Capture Signature window.
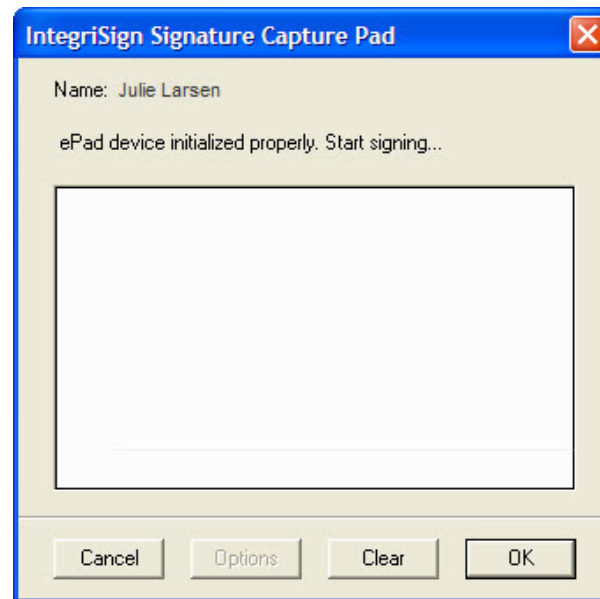
2. **Click OK after the candidate has signed his or her name.**

The Admissions Manager window redisplays, and the candidate's signature is displayed.

This is the signature that will be stored in the database with the candidate's record. Be sure the signature was captured clearly. If it was not, a message appears asking you to recapture the signature. You must click **Ok** and recapture the signature.

Listed below are some tips on capturing signatures:

- Let candidates know that the signature may not appear on the signature pad as they sign. Some candidates expect to see their signature on the pad and start pressing too hard as they write.

- The signature may not register if the candidate writes too big or too small. Ask candidates to write in the size they normally would.

- The signature pad responds to any pressure within the small, black window that surrounds the signature line. Some candidates allow their hand or little finger to touch the window as they sign, particularly left-handed people, and this can cause unreadable signatures.

- If the candidate touches the signature window with his or her hand or the stylus before actually signing, the signature pad registers this, which may result in an unreadable signature.

- An error message may appear if the signature did not get captured correctly -- if, for example, the candidate signed his or her name too small. If this message appears, click the **Ok** button, and then recapture the signature.

- If an error message continues to appear or if you cannot obtain a clear signature, you may need to use the backup signature pad. Click the **OK** button in the message, and then click the **Cancel** button in the signature pad window. You must then use the backup signature pad to capture the signature.

3. **Compare the candidate's signature to the signature on the candidate's identification.**

   The captured signature **must** match the signature on the candidate's ID. If they do not match the candidate cannot test and an Incident report must be submitted.

4. **If the signatures match, return the ID to the candidate.**

   Tell the candidate to keep the ID with him or her during the test, since it will be required when signing in to the test room (such as after an unscheduled break, e.g for a fire alarm).

5. **Click the Next button to continue the admission process.**

   When you click **Next**, the next admission step required for this candidate is highlighted in bold in the Admissions Manager window.

Taking a photograph

A candidate's photo captured during Admissions may be used for many purposes, depending on the circumstance, so it is important to take the photo properly. If there is ever a question of test fraud or a candidate's identity, Pearson VUE may need to use the photo for verification or as part of an investigation. For example, if a candidate is suspected of using a proxy-tester or imposter to take a test multiple times at different locations, we rely on the quality of the photos taken to make a comparison. If the quality is poor, it becomes difficult for us to move forward with an investigation or verify a candidate's identity.

The **Capture photo** step is listed in the Admissions Manager window, and it is a requirement that every candidate's image is taken. (If the camera is not working properly, you should use a back-up web camera). If this fails and a photograph cannot be taken, the candidate is not allowed to test.

If any issue or problem related to the candidate's photograph arises, you need to file an Incident Report.

Follow these steps to take a candidate's photograph:

If the candidate has previously taken the test, a photograph may already exist for the candidate in the database; if so, it is already displayed in the Admissions Manager window. Take a new photograph, as outlined in this section, and the new photo will replace the existing one in the database. If the existing photo does NOT appear to match the candidate, file an Incident Report immediately.

1. **Ask the candidate to be seated in the designated chair near the administration workstation.**

    The camera should already be focused on where the candidate is seated, but you may need to ask him or her to move slightly in order to centre the image in the window. Also, the **Capture Photo** window should automatically appear on the screen after clicking **Next** in the previous Admission Step. If not, click the **Capture** button located on the **Admissions Manager** window.

The background behind the candidate must be clear with no plants, filing cabinets or other objects visible behind or around the candidate. The camera should already be focused
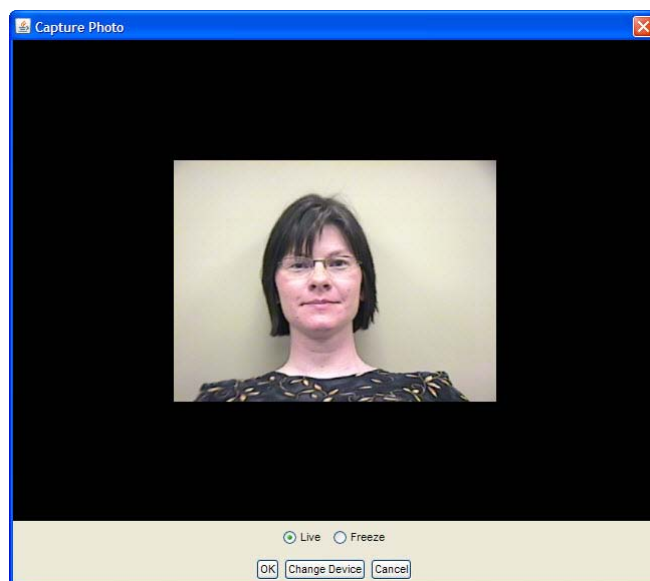
2. **When the candidate's image is centred in the window, click the Freeze button, and then click OK.**

The Admissions Manager window containing the candidate's photo is displayed, as shown in the following illustration.
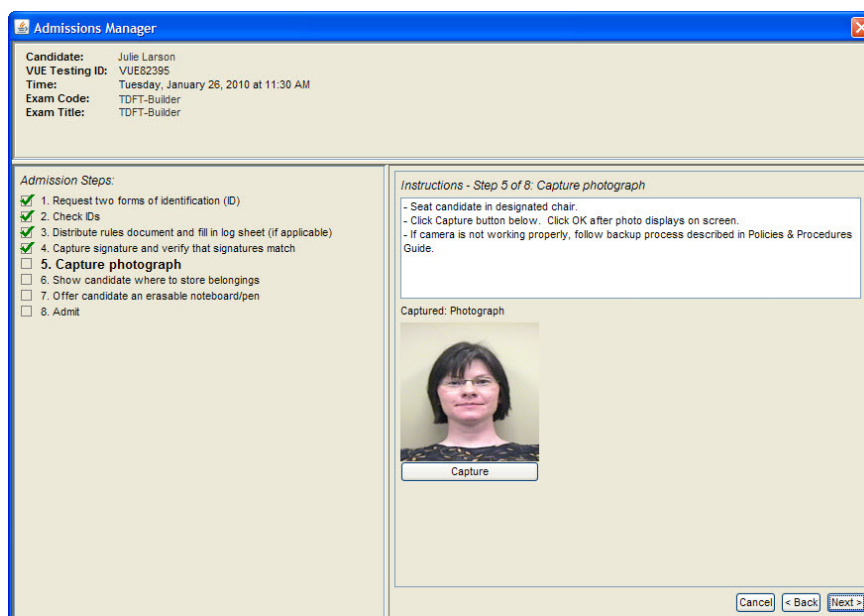
Use the following guidelines when taking a photo:

- The candidate's entire face and neck area should appear and be centered in the picture. Adjust the camera, if necessary. It is important that the candidate's face and shoulders fill the frame as much as possible. If more of the candidate's body is visible or if there is a lot of blank space around the candidate, the candidate is probably sitting too far away from the camera. The candidate should face the camera directly and must remove all items that cover the face including sunglasses, scarves and hats.

- The candidate's eyes should be open and looking directly at the camera.

- The photo must be clear and in focus with no glare or shadows on the candidate's face.

- Only the candidate and a neutral background can appear in the photo; no other items such as plants, pictures, doors, filing cabinets, etc. are allowed.

The photos below are examples of how your photos should appear.

The photo should **NOT**:

- Contain any distractions in the background, e.g. plants, windows, artwork, wall corners, etc.

- Show obstructions or facial expressions, i.e. no hands, closed eyes, hair in front of eyes, etc.

- Show outerwear, hats, or sunglasses.

- Be taken from too far away.

- Be poorly lit or show shadows on the face.

In order to help you take quality photos that meet the guidelines above, the AWARE photo technology software is installed and enabled at your ITC. It automatically focuses and crops the photo to present the best picture quality. The software also provides messages on the screen if something needs to be adjusted.

Below are examples of the messages you may receive when taking a photograph with the AWARE technology. You will need to slightly adjust the candidate in order to satisfy the message requirements.

If you receive the message below, make sure that the candidate is directly facing the camera. Click **OK** to retake the photograph.
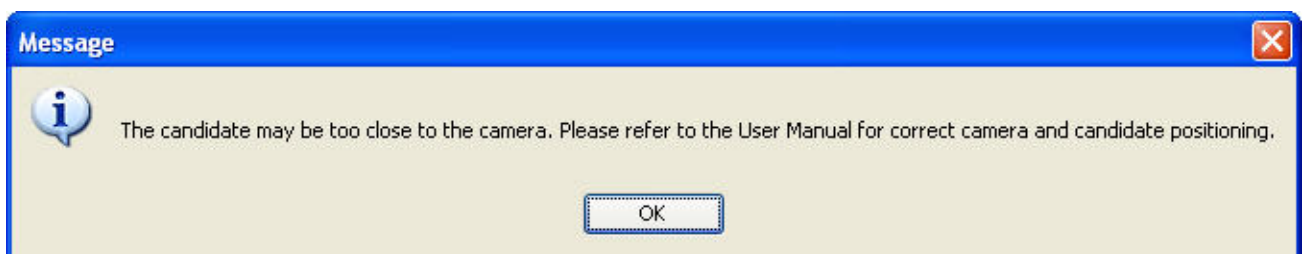

If you receive the message below, be sure to centre the candidate's face in the picture. Click **OK** to retake the photograph.
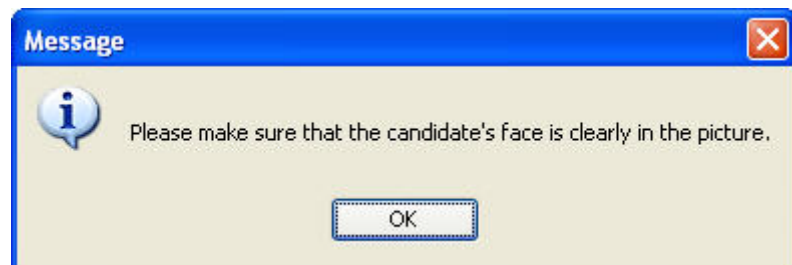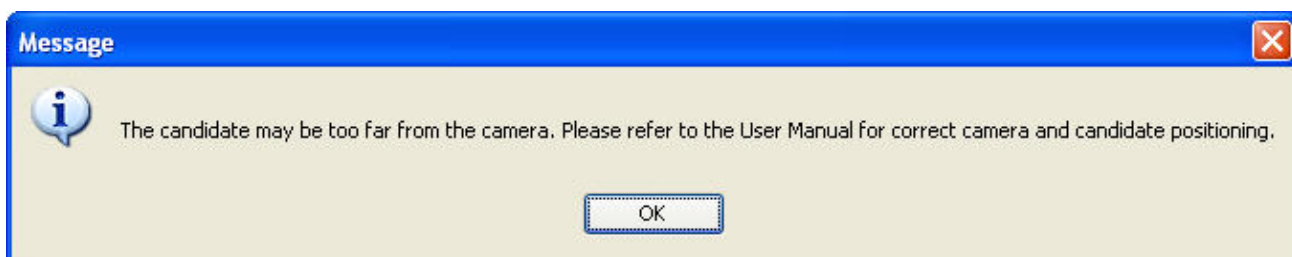

If you receive the message below, the candidate is too close to the camera. Move the candidate back a little bit. Click **OK** to retake the photograph.
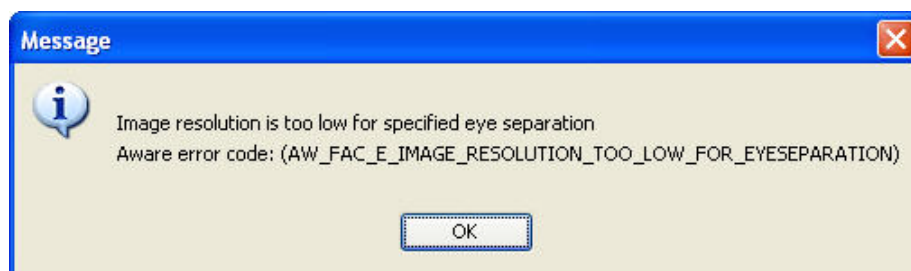

If you receive either of the messages below, you may need to move the candidate slightly closer to or away from the camera, depending on the message. Click **OK** to retake the photograph.

If you receive the message below, contact VSS for assistance.

To retake a photograph, simply click the **Capture** button and repeat steps 2 and 3. You do not have to go through the entire admissions process again to retake the photo. Once the picture is acceptable, continue onto step 3.

3. **Click the Next button to continue the admission process.**

   When you click **Next**, the next step in the admission process required for this candidate is highlighted in bold in the Admissions Manager window.

   If you encounter issues with your camera set-up, let your ITC Manager or technical contact know immediately. If you encounter a situation that you are not able to fix on your own or the system does not allow you to take pictures according to the standard procedures, contact Pearson VUE about alternative positioning for the cameras and lighting.

Tips for taking a photograph using AWARE photo technology

In order to help you take quality photos that meet the required guidelines, the AWARE photo technology software is installed and enabled at your ITC. It automatically focuses and crops the photo to present the best picture quality. The software also provides messages on screen if something needs to be adjusted. This section provides some Frequently Asked Questions (FAQs) and tips on using the AWARE technology.

Also, if you are having consistent problems after utilizing the tips, you can create an incident report with information regarding those problems. Choose the **Problem with Computer Hardware** topic under the Computer System Issues category. Make sure to select **AWARE photo technology software** as the topic detail.

The following table contains some FAQs on the AWARE technology:

FAQ	Answer
Does AWARE software work on the VTS platform?	Yes
Should the Logitech Application Suite be installed?	No
How is the photo view changed/manipulated?	By the Logitech camera/software
Will the test administrator receive error messages?	Yes
Does the Logitech Pro 9000 / Logitech HD Webcam C615 automatically crop the photo?	Yes
Do you have the option to manually zoom your camera?	No; the camera is automatically configured to zoom and does not require test administrator intervention
Approximately how far should candidates stand from the camera?	2-3 feet

Below is a table with best practices on using the AWARE technology. Each ITC is configured differently, so you should determine what works best for your ITC.

Expectations/challenges	Best practices from Pearson VUE
The same spot for taking photos does not work for all candidates.	This distance can be easily established through experimentation with the camera in test mode. Mark a line/put a label on the floor to mark the spots where photos are taken best for candidates.
Background issues/bad lighting	Practice with the camera to find the perfect location. An ITC may need to order a desk light that they can use.
Short/tall candidates	For a tall candidate, move the candidate forward a few inches and having them look down into the lens produces a good quality photo. Adjust chair or have candidates lean forward. For a short candidate, have them move back a few inches. Using a chair with casters makes it easier for the candidates to move forward or backward – or no chair at all, if you can position the camera higher/lower.

Expectations/challenges	Best practices from Pearson VUE
Delay in taking and viewing the photo	There is a 2-3 second delay when taking photo and another 2-3 second delay for test administrator to see the photo. Have the candidate look directly at the camera, then freeze-frame the picture before actually capturing it. Ask candidates to remain still.
Error Messages received from AWARE	Solutions for error messages can be viewed in the "Taking a photograph" section of this chapter.
Clothing with stripes/logos	Readjust the camera, if possible, so that the camera cannot focus on that part of the shirt.
Candidate has clothing with faces on front	Candidates wearing shirts that have a face on the front may provide an error message that there are "multiple faces" in the picture. Readjust the camera, if possible, so that the camera cannot focus on that part of the shirt. If necessary, the ITC should take action to ensure the correct quality of image can be taken.
Candidate face is not in the middle of the frame	Centre the candidate's nose in the frame, so when the camera crops the photo, the image is properly centred in "capture box." Have the candidate look straight at the camera by asking them to "please look here."
Candidate wearing glasses/large earrings	Glasses reflect the office lights. If necessary, have the candidate remove their glasses and re-take the photo. If a candidate is wearing large earrings, particularly metallic earrings, you may have to ask the candidate to remove them before taking the picture.

Trouble Shooting:

- Practice, practice, practice - be patient.

Backup photograph process

Each ITC should have a backup web camera and signature pad in case there are any technical problems with the hardware. Candidates cannot sit a test without having their image and signature taken.

Completing the ITC Test Log

Each candidate must sign the test log to consent to having their image taken and to sign in for the test. The test administrator should complete and sign all other test log fields.

The test log entry provides a record of each candidate's activity, which is useful if questions or problems arise in the future. It also provides a way of ensuring that each candidate's IDs are checked.

Master copies of the ITC Test Logs are available from the Downloads page on the VSS web site.

You must complete and file test logs each day and keep them at your ITC for a minimum of 2 years.

After the candidate has signed the test log, click the Next button in Admissions Manager.

Storing personal belongings

1. **Have the candidate store any personal belongings in an individual, secure locker**

   Candidates are not allowed to bring any items into the test room.

2. **Click the Next button in Admissions Manager.**

Rules about personal belongings

Candidates are discouraged from bringing any personal belongings to the ITC, since these items must be stored in the individual, secure lockers provided and are not permitted inside the test room.

❖ Personal belongings are not allowed inside the test room due to security reasons - for example, candidates could hide notes in a purse or briefcase or send out information about a test via a mobile phone.

❖ Explain to candidates that no personal items are allowed inside the test room; everything must be stored inside the individual secure lockers provided just outside the test room. If a candidate insists on taking an item into the test room, explain the policy again. Ask the candidate to store the item and advise the candidate that you will need to report the incident if he or she does not cooperate. If the candidate still refuses to store the item, file a detailed Incident Report immediately and include information about the type of item the candidate refused to store.

❖ You must be diligent and consistent when checking in candidates to ensure that no unauthorised materials are allowed in the test room.

   ITC's are required to have one locker per delivery workstation / testing candidate for storage of personal belongings

Personal belongings that must be stored

The following are examples of items NOT allowed (but not limited to) inside the test room:

Outerwear (coats or jackets)	No coats can be worn in the test room. If a candidate complains that the test room is cold, offer to turn up the heating. Clothing that is part of an outfit that would typically be worn indoors, including sweaters, sweatshirts and blazers are allowed.
Hats, hairbands, etc.	No hats of any kind or other head coverings are allowed inside the test room. Small hairbands and clips are permitted.
Mobile phones or pagers	Candidates should turn off the sound on their mobile phones and pagers before placing them in the locker.
Purses, wallets and watches	Watches should be stored inside the lockers.
Hand-held computers, personal digital assistants (PDAs), ipods or other electronic devices	Please ensure all electronic devices are turned off and placed inside the lockers.
Briefcases, backpacks or bags	If the item is too big for the locker, you may suggest the candidate leave the item in the boot of their car.
Notes, notebooks, study guides	
Calculators	
Dictionaries, including language translation dictionaries	
Pens and pencils belonging to the candidate	
Water bottles, contact lens solution, eye drops and lip balm (such as Chap Stick)	Cough drops and pills are allowed as long as they are unwrapped and not in a bottle or other container. Inhalers are allowed inside the test room.
Food, drinks or tobacco products	Candidates are NOT permitted to bring food or beverages into the test room, but they may store the items in a locker. If a candidate wants to store food with a strong odour that may be offensive or distracting to other candidates or ITC staff, ask the candidate to either dispose of the food or to store it in his or her car.
Weapons of any kind (guns, knives, etc. – including realistic 'toy' weapons)	Weapons are NOT allowed on ITC premises. In ALL cases involving weapons brought on site, file an Incident Report. If at any time you believe staff or candidate safety may be at risk, notify the police.

Permitted personal items

The following items are allowed inside the test room. Care should be taken to ensure that there is nothing concealed in or written on these items.

Layered indoor clothing	Examples of layered indoor clothing are sweaters, sweatshirts, blazers/suit coats or any other layered clothing that is part of an outfit. This category also includes saris and similar traditional garments worn in a draped fashion by women on the Indian subcontinent and elsewhere. Candidates are permitted to carry a sweater or sweatshirt into the test room with them and are permitted to take it off and place it on the back of their chair if it gets too warm.
Religious/cultural apparel	
Discreet jewellery, e.g. rings	

Religious apparel

Religious apparel are articles of clothing worn as part of the doctrinal or traditional observance of the religious faith practiced by an adherent. Some examples of religious apparel include:

Habit -- a garment worn by members of Christian religious orders (normally a tunic worn with a hood or veil).
Hijab -- a head, face or body covering worn by Muslim women (this may range from a head covering or scarf, to a full burqa covering the entire body)
Kippah (or Yarmulke) -- a rounded skullcap worn by Jewish men and women. **Kirpan** -- a ceremonial dagger worn by some Sikh men and women.
Kufi (or Doppa) -- a rounded skullcap worn by Muslim men.
Turban -- a headdress consisting of a long scarf wound round the head, worn by Sikh men and women.

With the exception of some kirpans (see restrictions below), items considered religious apparel are allowed inside the test room. Visual inspection should be carried out by examining the item without directly touching it or the candidate, and without asking the candidate to remove or unwrap it. Observe the item closely from an appropriate professional distance in order to ascertain to your own satisfaction that it is not being used to conceal notes or other prohibited materials.

It may not always be immediately clear whether an item of clothing is considered religious apparel. There may be types of religious apparel not listed above. If a candidate identifies an item of clothing as religious apparel, treat it as such.

With the exception of kirpans (see policy below), under no circumstance should any candidate be asked to remove an item of religious apparel for inspection, unless upon direct visual observation there is strong visual evidence that a prohibited item is concealed in it. If prohibited items are discovered, ask the candidate to have a seat in the waiting room, and follow the procedures to contact the Program Coordinator as described in responding to candidate misconduct. The Program Coordinator will advise whether the candidate will be permitted to test after removing the prohibited items.

Visable permanent tattoos or henna tattoos should be visually inspected without directly touching the candidate. File an Incident Report and allow the candidate to test.

Ceremonial daggers (Kirpans)

A kirpan is a ceremonial curved dagger that some Sikh men and women are obliged to wear at all times.

If a candidate is wearing a kirpan, ask the candidate to store it in their locker. If the candidate objects to storing the kirpan and it is no more than 12 inches in length, then request that the candidate secure it beneath their undergarment(s) so it won't fall out and is not visible to other candidates. The candidate may then enter the test room. Do not file an incident report.

Comfort aids

Certain items defined as "minor comfort aids" may be allowed inside the test room. They must be visually inspected by the test administrator before they are brought into the test room. Visual inspection should be carried out by examining the item without directly touching it or the candidate and without asking the candidate to remove the item. These include:

Bandages
Braces - Wrist, Leg or Ankle Braces

Canes
Casts - including slings for broken/sprained arms and other injury-related items that cannot be removed.
Cough drops - must be unwrapped and not in a bottle/container.
Crutches
Eyeglasses (without the case)
Eye patches
Hearing aids
Insulin pump - **File an incident report if a candidate uses this aid.**
Medical Alert Bracelet - including medical alert bracelets with USB ports. **File an Incident Report if you notice any unusual behaviour with a candidate wearing a medical alert bracelet with USB port.**
Medical device attached to a person's body - **File an incident report if a candidate uses this aid.**
Motorised Chair
Neck braces or collars (worn by people with neck injuries)
Support devices for supporting neck, back or limbs, including but not limited to pillows and wrist rests for the mouse or keyboard
Pills - i.e. Tylenol or aspirin must be unwrapped and not in a bottle/container. Candidates may bring pills that are still in the packaging if the packaging states they MUST remain in the packaging, such as nitro glycerin pills that cannot be exposed to air. Packaging must be properly inspected. **If candidate brings pills in the wrapper/packaging in the test room, file an incident report.**
Scooters/chairs - motorised
Slings for broken/sprained arms and other injury-related items that cannot be removed.
Tissues - such as Kleenex. Tissues must be ITC supplied. **Candidates may not bring in their own tissues.**
Walkers
Wheelchairs

A candidate must provide his or her own comfort aids, except for tissues. Comfort aids are not considered to be accommodations, and therefore, do not need to be pre-approved by Pearson VUE or CITB.

Eye-drops, water bottles, diabetic test equipment and other medical devices are not allowed inside the test room unless the candidate has been granted an accommodation for the item in advance. The use of some of these items may disturb other candidates, while others might cause damage to computer equipment.

Except as noted above, you do not need to file an Incident Report regarding the use of a comfort aid, unless the aid is unusual or suspicious or you observe candidate misconduct. If you are unsure of whether or not to allow a specific comfort aid in the test room, inform the candidate that you need to get approval and contact the Call Centre immediately.

Due to potential liability issues, ITCs are prohibited from dispensing medications. Do not dispense any type of medication to candidates, including pain relievers and antacids. Candidates who require use of other items from the first aid kit, such as the tweezers or band-aids, should be given the items to use themselves. Test administrators should not touch the candidate during the booking, registering and testing process, appropriately trained first aid staff my deliver aid in emergency situations.

Candidate photo identification

Candidates are **required** to take one photo drivers licence or other picture ID into the test room. The candidate's photo ID will be used to identify a candidate if an emergency occurs resulting in an unscheduled break.

Verifying & updating the candidate's demographic information

If you need to update a candidates information for the purpose of a test, please contact Pearson VUE customer service centre to make necessary changes to the system.

Admitting the candidate

The final step in the admission process is always "Admit." When you reach this step, click the **Admit** button to complete the admission process and admit the candidate. The "Admitted" message displays, as shown below. Click **OK** to return to the Admissions Manager Schedule window.
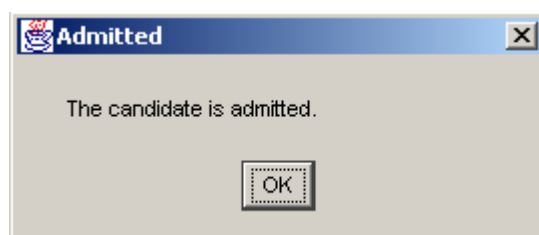
As shown below, the candidate's status is changed to Admitted. Notice that the **Admit** button is no longer available when the candidate's name is selected on the schedule. However, the **Revoke Admission** button is available. This button allows you to essentially delete a candidate's admission from the system. The candidate's test will now be listed on the Appointment Selection window in Delivery Manager so you can start the test.
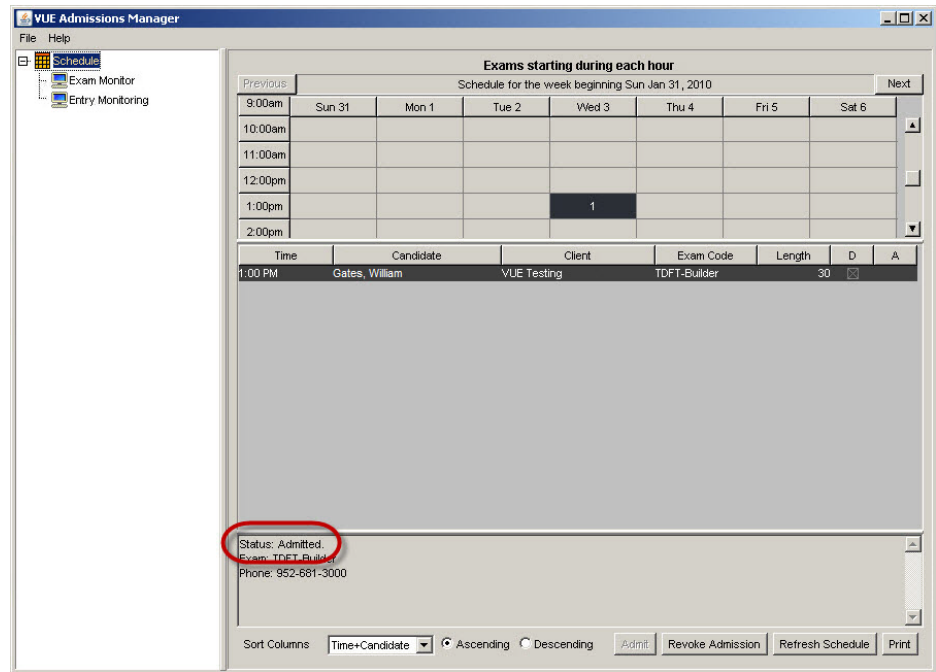
Revoking an admission

In rare cases, a test administrator may choose the wrong name in the Admissions Manager Schedule window and admit a candidate under another candidate's name, or select the wrong test. If you select the wrong name and then proceed through the admission steps and click the **Admit** button in the final step, you can use the **Revoke Admission** button in Admissions Manager to essentially delete the admission and admit the candidate all over again under the correct name. This feature can be used only if the candidate has not yet started the test. Follow these steps:

1. **Log in to Admissions Manager and select Schedule in the left pane.**

    The Schedule displays, as shown below. In this illustration, the name of a candidate who has already been admitted is selected. Notice that the **Admit** button is not available, but the **Revoke Admission** button is available. This button will NOT be available if the candidate has already started the test.
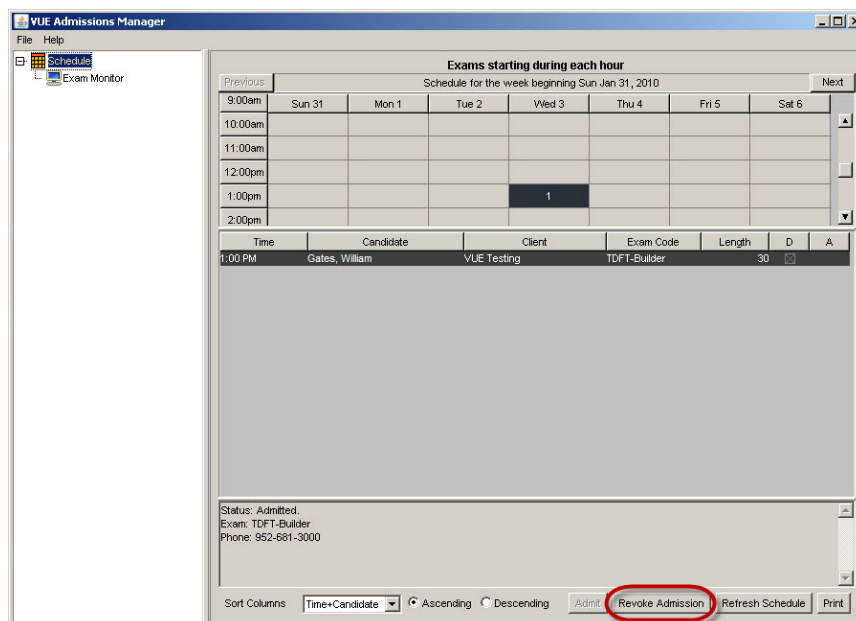
2. **Carefully check that you have selected the name of the candidate whose admission you want to revoke, and then click the Revoke Admission button.**

The Revoke Admission window appears and lists the candidate's information, as shown below. As the instructions state, if you revoke the admission, the candidate will no longer be admitted for the test. You will need to redo all admission steps in order to admit the candidate for the test.
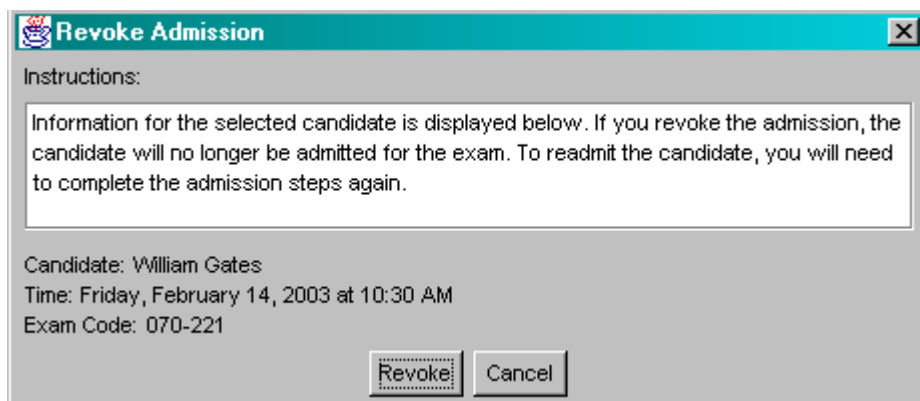
3. **If you are sure you need to revoke the admission, click the Revoke button.**

The candidate is no longer admitted for the test. To admit the candidate, you need to select the candidate's name on the schedule in Admissions Manager, and then click the **Admit** button.

If a candidate takes a test under incorrect name details, they will need to re-take the test under their own name. If this occurs, the test administrator should immediately raise an incident report.

Managing Test Delivery

This chapter contains the following sections:

Verifying candidate's identity (entry/exit monitoring)

A candidate's identity must be verified *each time the candidate enters or leaves the test room* (including when he or she leaves to take an unscheduled break, for example in an emergency, and when they finish the test). The time for when the candidate enters and exits the test room must be logged on the test log.

Seating candidates

Listed below are guidelines for seating candidates in the test room.

❖ Children, husbands or wives, relatives and friends of candidates are **NOT** permitted inside the test room.

❖ Begin seating candidates as far from the door as possible, so there will be less distraction as you seat candidates who arrive later.

❖ If there are not many candidates testing at one time, you can seat candidates at every other workstation (with dividers in place).

Using Delivery Manager

This section provides information about using the Delivery Manager application, which runs on each workstation on which tests will be delivered.

❖ To run Delivery Manager, you must be authorised to use it.

For security reasons, the Delivery Manager application should never be left running unattended. When Delivery Manager is not being used, be sure to close the application.

Starting a test using Delivery Manager

Use the following procedure to start a candidate's test in Delivery Manager. After you start the Delivery Manager application on a workstation and log in, the application can be closed only by a test administrator with a valid username and password for the Pearson VUE applications. Candidates cannot exit Delivery Manager or access Windows or any other application on the system.

Do not start a test for a candidate until after he or she has entered the test room and has verified his or her name and the test name and number.

Follow these steps to start a candidate's test:

1. **Launch the Delivery Manager application on the candidate's workstation by double-clicking the Delivery Manager icon on the Windows desktop.**

   An introductory window appears, and then the Login dialog box displays as shown below.

2. **Type the username and password for your Pearson VUE account and click the Login button.**

   The Appointment Selection window appears, displaying candidate appointments for the current day.

3. **Click the candidate's name in the list.**

The candidate's contact information displays in the upper part of the window.

4. **Using the information in the window, verify the candidate's name and have the candidate verify that this is the test he or she wants to take.**

   Always be careful to select the correct test and candidate in the Appointment Selection window before starting the test. It is not unusual to have two candidates on the same day with similar names, and it is critical that each candidate takes the correct test. A good practice is to read the candidate's name and the test name to the candidate before starting the test, so that mistakes can be caught immediately.

5. **Be sure the correct test is highlighted in the grid, and then click the Start button to launch the test.**

6. **If the Accommodations dialog box is displayed, grant or rescind the accommodations, and then click the OK button.**

7. **Turn the workstation over to the candidate.**

Starting tests on Delivery Manager with no connection to the Hub

If your ITC is having connectivity issues and Delivery Manager cannot connect to the hub, you will need to obtain an authorisation code to start the tests on all of the delivery workstations until the connection has been restored.

Follow the instruction below to obtain an authorisation code.

1. **When you click on the start button, an Authorisation window will pop up as shown below.**

2. **Call VSS to obtain an Authorisation code.**

   You must provide VSS with the Challenge Key in the Authorisation window in order to receive an Authorisation Code.

3. **Enter the Authorisation Code into the box and click OK.**

   The Authorisation Code from VSS will be a 12-digit, numeric code. Be sure to tell VSS how many tests you will be delivering that day. VSS will provide you with a multi-pass Authorisation code that can be used for every test that day. However, if you have more tests than the number you gave to VSS, the number of authorisations that the multi-pass can be used for will run out. You will need to call VSS and get a new Authorisation Code.

   If you have only started and entered the multi-pass Authorisation Code on one workstation, you will not be required to enter the Code on any of the remaining workstations, unless the number of authorisations has run out.

Server connection error in Delivery Manager

The following message may appear in Delivery Manager if the application is not able to connect to the server:
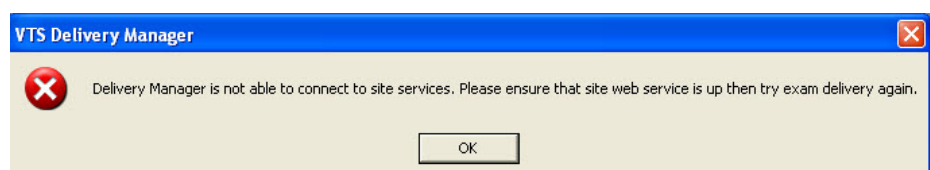
If this message occurs, run a report that will verify if RMA is running properly and if the Application Wrapper service is running RMA.

The report should list when RMA connected since midnight on the previous day. If no connections have taken place, ensure that the server is powered ON. **If the server is powered on, then you must contact VSS immediately for assistance.**

Starting Delivery Manager without the required credentials

If you are logged into Delivery Manager and your VTS password is expired, your account is locked or you haven't set your security questions, Delivery Manager will not allow you to start a test. A message will appear after you select a candidate on the Appointment Selection screen and click the **Start** button. After you read the message and click **OK**, an Authorisation Window will appear. You will need to either update your account or obtain an authorisation code in order to start the test.

Follow one of the instructions below depending on what message appears.

Your account is locked

If you attempt to start a test in Delivery Manager but your account is locked, you will receive a message informing you of this.

Click **OK**, and then click **Cancel** in the Authorisation Window. Contact one of the users with the permission to unlock accounts. If they are unavailable, Channel Quality or VSS may be contacted to unlock an account. After your account is unlocked, start the test again. Delivery Manager should allow you to start the test.

Your password is expired

If you attempt to start a test in Delivery Manager and your password is expired, you will receive the message below indicating that you must log into Site Manager to update your account.
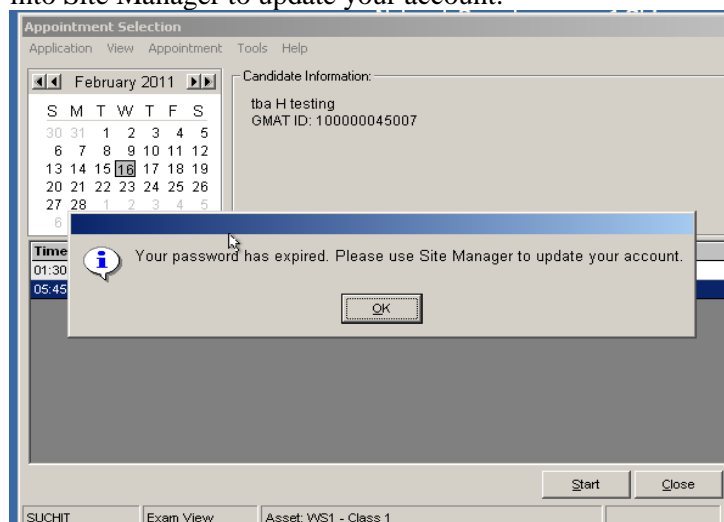
Click **OK**, and then click **Cancel** in the Authorisation Window. In order to start the test, you must first log into Site Manager and update your password. You will be prompted to change your password. After you update your password, start the test again. Delivery Manager should allow you to start the test.

You haven't set your security questions

If you attempt to start a test in Delivery Manager without having your security questions in Site Manager set up yet, you will receive a message indicating that you need to update your account in Site Manager.
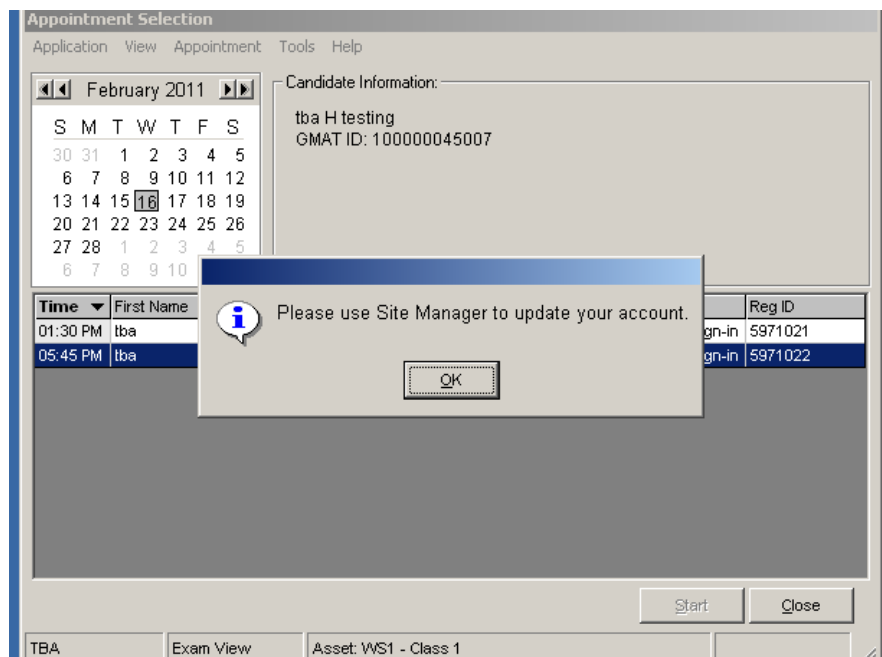
Click **OK**, and then click **Cancel** in the Authorisation Window. Log into Site Manager and select and answer the two security questions before continuing with Delivery Manager.

After you set your security questions, start the test again. Delivery Manager should allow you to start the test.

Your password is out of sync

If you have updated your password and RMA hasn't run yet, your password and security questions might be out of sync with the Pearson VUE system. If this occurs and you attempt to start a test in Delivery Manager, you will be prompted to obtain an Authorisation Code before continuing. Before calling VSS, run a manual RMA to sync your password with the Pearson VUE system, and then attempt to start the test again.
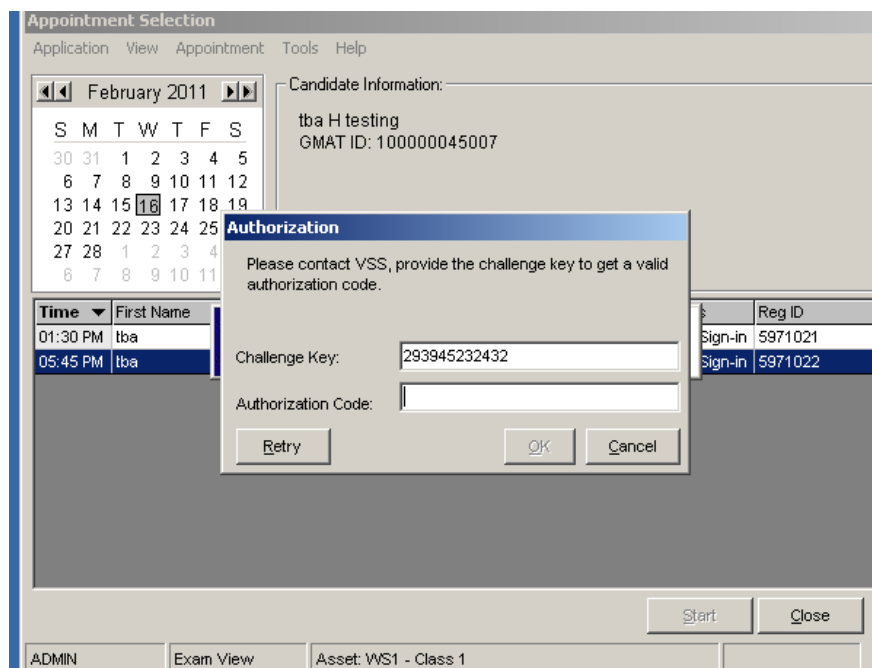
Write down the challenge key and contact VSS. Once you give VSS the challenge key, they will provide you with an Authorisation Code in order to continue. Once you enter the code, click **OK** to start the test.

Appointment selection window

The Appointment selection window in Delivery Manager allows you to select the candidate whose test you want to start, verify the candidate's identity and test, and launch the test for the candidate. For security reasons, this window closes automatically if there is no activity within a certain amount of time.
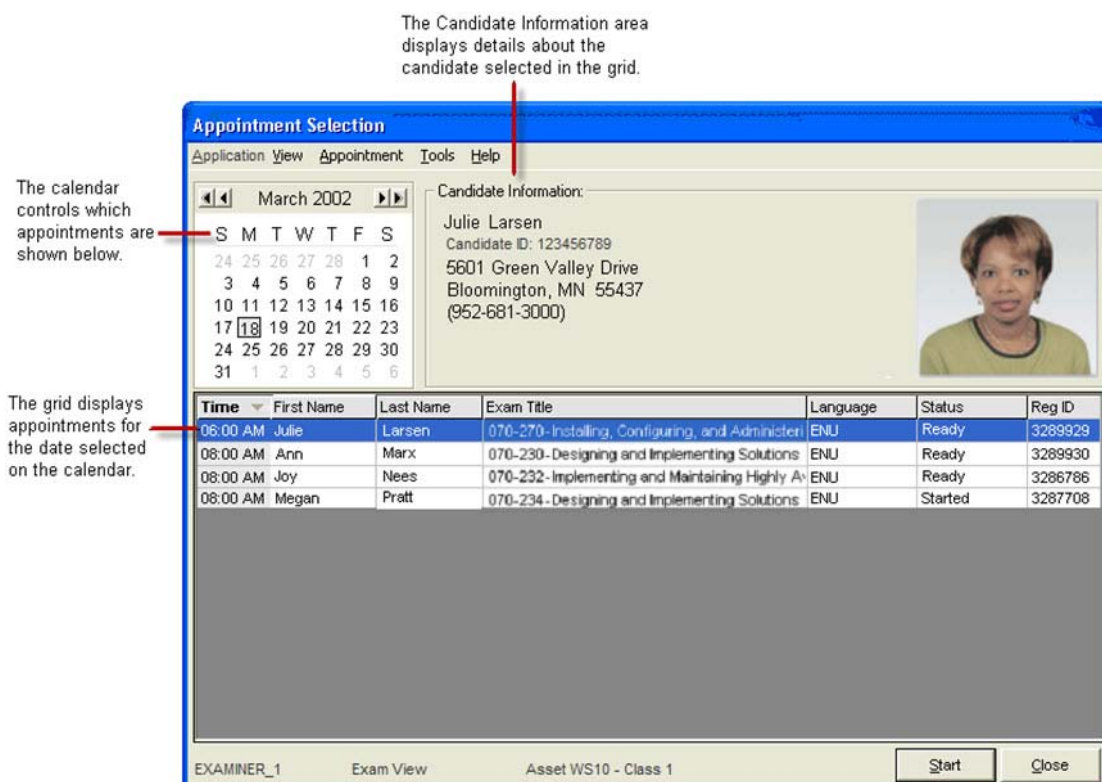
Listed below are the main points you should know about the window.

❖ The **calendar** controls which appointments are shown in the grid. The current date is automatically selected and highlighted when the window opens. Click a date on the calendar to select it, or use the Ctrl+N and Ctrl+P keys to move to the next or previous date. Click the arrows to the left and right of the month name to move to the previous year or month and to the next month or year.

❖ The **grid** displays appointments for the date selected in the calendar. Use the up and down arrow keys on the keyboard to move between appointments in the list, or just click the appointment you want to work with.

The grid contains information about each appointment that is ready to be delivered (the candidate has been admitted), has been started (is in progress) or has been stopped. The information includes the registration ID number, appointment time and candidate name. To start a test, click the candidate name to select it and click the **Start** button at the bottom of the window. (You can also start a test by double-clicking the entry in the grid.)

The grid is automatically refreshed every 30 seconds with the latest appointment information. Appointments may be added to or removed from the grid as candidates start and finish tests. Note that the row in the grid that is selected will *remain selected* even after the window refreshes, so that you do not accidentally start the wrong test. In addition, if the selected row is removed from the grid, then no row will be selected after the window refreshes.

❖ The **candidate information** area displays information about the appointment selected in the grid, including the candidate's full name and address. (Note that requests for candidate name changes should be made via an Incident Report. In most cases, you can make address and phone number changes in Registration Manager).

❖ To **resize columns** in the grid, position the cursor on the line that separates two columns; when the cursor changes shape, drag it to make the column wider or narrower. Resizing changes are saved and used the next time you activate Delivery Manager on this workstation.

❖ To **sort appointments** displayed in the grid, click a column heading, and the list is sorted by that heading. For example, click the Last Name column to display appointments sorted alphabetically by last name. The name of the column by which you sorted appears in bold, and the column is highlighted slightly. The arrow next to the column name indicates whether entries are sorted in ascending or descending order. Click the column name to switch between ascending and descending. Sorting changes are saved and used the next time you activate Delivery Manager on this workstation.

❖ To **use the menu options** available in the Appointment Selection window, refer to the following table.

Menu	Command	Selecting this command...
Application	Close	Closes the Appointment Selection window and displays the Delivery Manager login dialog box.
View	Next Day	Selects the next day on the calendar and displays that day's appointments in the grid.
	Previous Day	Selects the previous day on the calendar and displays that day's appointments in the grid.
	Next Month	Selects the same date in the next month on the calendar and displays that day's appointments in the grid.
	Previous Month	Selects the same date in the previous month on the calendar and displays that day's appointments in the grid.
Appointment	Start	Starts the test for the appointment selected in the grid.
	Refresh	Reloads the grid with the most current information.
Tools	Change asset	Displays the Workstation Asset Selection dialog box, which allows you to change the asset corresponding to the workstation. The dialog box lists all of your ITCs defined assets, except the one currently associated with the workstation. To change the asset, click the asset you want to use and click **OK**.
Help	About VTS Delivery Manager	Displays information about the application. Also contains a **Report** button that VSS may ask you to use for troubleshooting.

Accommodations / special assistance

Automatic accommodations - An automatic accommodation is one that is automatically granted within the Pearson VUE Testing System™ and can be managed through the software. These are accommodations that CITB has automatically granted to certain candidates without candidates requesting them. For example a foreign language voiceover can be made available.

These accommodations are noted on the Admissions Manager schedule and in Registration Manager; they are also listed in the accommodations window in Delivery Manager. Since information about these accommodations is displayed in the system and they are handled automatically, test administrators are not informed about these accommodations in advance.

Candidates who require additional support such as a reader/recorder, an interpreter or sign language need to take their test at a standard test centre by calling the Special Assistance booking line on 0344 994 4491.

Viewing accommodations information

If a candidate has been granted an automatic accommodation, it will be noted on the Admissions Manager schedule. In addition, when you start the candidate's test in Delivery Manager, you will see information about the accommodation.

You can also see information about automatic accommodations that have been granted in Registration Manager.

Removing accommodations

Revoking -- On rare occasions, an accommodation may need to be removed if, for example, the wrong accommodation was granted to a candidate. This is called *revoking* an accommodation and can only be performed by the Call Centre; ITCs cannot perform this function.

Granting or rescinding accommodations

When automatic accommodations are granted for a registration, the Accommodations window lists all of the accommodations that were granted; the window does not appear if no accommodations have been granted. In most cases, you will not have to do anything in this dialog box except click **OK**, but you may need to confirm or rescind some accommodations.

Accommodations can be set to one of three states:

❖ **Granted**

❖ **Rescinded**

❖ **Granted & Locked** -- This indicates that you cannot rescind the accommodation; these accommodations have already been granted and cannot be changed.

To grant or rescind an accommodation, click the checkbox next to the accommodation description until the Granted or Rescinded symbol appears. After you have granted or rescinded all necessary accommodations, click the **OK** button.

Invigilating a test

IMPORTANT: To ensure a high level of security during the test as required by CITB, candidates must be monitored at all times. ALL tests must be invigilated by a Pearson VUE certified test administrator. Only these test administrators are permitted to log in to Delivery Manager and invigilate tests.

Invigilating guidelines

Multiple test administrators are required to monitor a test if more than 8 candidates are taking a test at one time. For example 2 test administartors would need to invigilate between 8-16 candidates.

❖ Candidates must be monitored continuously throughout their tests.

- At ITC's, monitoring can be handled using the methods listed below. Regardless of which method is used, the test administrator must have a clear view of all workstations, and the hands of all candidates should be visible.

  o **In room** -- The test administrator is located in the room to view all activities during the test. It is important that this type of viewing does not cause a disturbance.

❖ When switching duties, taking a break, going to lunch, ending your work day or *leaving the ITC for any period of time*, be sure to log out of *all* applications you have logged in to. The test administrator who is currently registering, invigilating and/or administering tests must log into the applications with their personal username and password.

❖ Use of mobile phones, checking email, reading books, eating or drinking are all prohibited activities while invigilating, as your full focus should be on the testing candidates.

❖ If an ITC has CCTV monitoring, the test administrator must inform the candidate that they will be monitored routinely throughout the test session. Candidates cannot refuse to be CCTV monitored.

❖ **If you realise you have started a test for a candidate under the wrong name, or if a candidate starts the test and then tells you that it is not the right test, stop the test. Tell the candidate you need to call Pearson VUE to get the problem resolved, and ask them to wait in the reception area while you call VSS for assistance. Even if the candidate is taking the correct test, it is important that he or she takes the test *under the correct name* so the score report is assigned to the right person. Correct the error before the candidate proceeds any further with the test; do not let the candidate continue and assume that the results can be corrected later. Make sure to document the incident in the Incident Report. If the candidate completes the test under the wrong name, they would need to re-take the test under the correct details.**

❖ If something goes wrong with the test while the candidate is taking it, stop the test in Delivery Manager and contact VSS immediately. Do not have the candidate try to complete the test.

❖ If you observe notes or other materials being removed from the test room by a candidate at any time, you must confiscate the materials and file an Incident Report.

❖ Do not give candidates medical assistance or medication (aspirin, cough drops, etc.)

❖ Address all disturbances within the test room. This may include disturbances caused by candidates within the test room and/or noises outside the test room that can be heard in the test room.

Answering questions during tests

❖ Test administrators are not allowed to assist candidates in understanding test questions, define terms, translate text or help with other matters relating to test content. If a candidate asks you a question that is not related to using the computer or the test software equipment, explain that CITB does not permit test administrators to answer these types of questions.

❖ Candidates are able to hide the time remaining countdown during their test. During the candidate's test, there is a clock icon in the upper right hand corner. Next to the clock icon are the words "time remaining" with the time counting down in a digital format. If the candidate clicks on the clock icon, the time remaining is hidden, but the clock icon remains. If the candidate clicks on the clock again, the time remaining reappears. When the test gets to 5 minutes remaining, the time remaining is automatically unhidden so that candidates know they have 5 minutes left until it times out.

Test distractions

If a candidate experiences distractions during the test and complains about them, e.g. noise disruptions, file an Incident Report. If you are unsure about what to do, call VSS for assistance.

Candidate Misconduct

Candidates who create disturbances or conduct themselves in a manner that may jeopardise the security of a test or the safety of other candidates must be reported through an Incident Report. CITB will determine the action to be taken against the candidate, up to and including removal from the certification program.

Misconduct includes the following behaviours:

❖ Using unauthorised materials in the test room.

❖ Taking a test for someone else

❖ Causing disruptions of any kind

❖ Attempting to remove test questions or responses from the test room

❖ Tampering with computer hardware or software

Any disturbances that affect test performance must be documented.

Using Exam Monitor

The Exam Monitor application is a part of Admissions Manager and provides CITB with information about tests that are in progress. As candidates work on tests, the Delivery Manager application on each workstation sends information to Exam Monitor about the candidate's activity. This helps keep you aware of candidates test progress. In order to display individual workstation information through Exam Monitor, your ITC must have workstation asset binding enabled.

Please be aware that using Exam Monitor is NOT an acceptable method of monitoring candidates during the test. Exam Monitor is intended to provide the test administrator with supplementary information.

To run Exam Monitor, click the Exam Monitor icon in the left pane of the Admissions Manager application.

Test information appears on the right side of the window, as shown in the following illustration. Please note:

- Exam Monitor begins displaying information for a workstation when the first timed event item begins (when a test starts).

- If a workstation asset has an unavailability rule attached to it for the current date and time, information for that workstation will not appear in Exam Monitor.

The Exam Monitor window provides the information listed below. The window is refreshed frequently to display up-to-date information. Entries are removed from the window when Delivery Manager is closed on a workstation. By default, the entries are sorted alphabetically/numerically according to workstation name. To sort the entries using a different column, click a column heading. For example, click the Candidate column to sort the entries alphabetically by candidate name.

❖ **Priority** -- Indicates how soon the test administrator may need to attend to a test. If the column is blank, the test administrator's attention is not currently required. A large "X" icon indicates that the test requires the test administrator's immediate attention, usually because the test has ended. A large exclamation mark indicates that the test administrator's attention will be required soon.

❖ **Workstation** -- Displays the asset name assigned to each workstation.

❖ **Candidate** -- Lists the candidate's first and last name. The line below the name shows the name of the test the candidate is taking.

❖ **Event** -- Shows the type of delivery item the candidate is currently working on, such as tutorial, test or survey.

❖ **Status** -- Indicates whether the test is in progress, the test is finished or the candidate is on an unscheduled break.

❖ **Duration** -- Displays the length of the test appointment (not the amount of time remaining in the test).

❖ **Notes** -- The last line(s) in a row may contain information for the test administrator. For example, the test administrator is informed when the candidate starts a new event item (such as the tutorial, test or survey), and when the test has been completed or stopped.

An arrow on the right side of a row indicates that there is additional information that is not displayed in the window. Click the arrow to display a window that shows all of the text.

Managing breaks

There are no breaks during the test. If for any reason a candidate needs to take an unscheduled break at any time during the test, the test administrator must put the test into unscheduled break mode, and the candidate must leave the test room. The test timer will not stop during the unscheduled break. Whilst the candidate takes an unscheduled break, they are not permitted to leave the ITC or access their stored personal belongings. The only exception (with the approval of the test administrator) is accessing medication. ID will need to be inspected before allowing the candidate to re-enter the test room. The test administrator must click the **Resume** button and log in to Delivery manager in order for the candidate to resume testing.
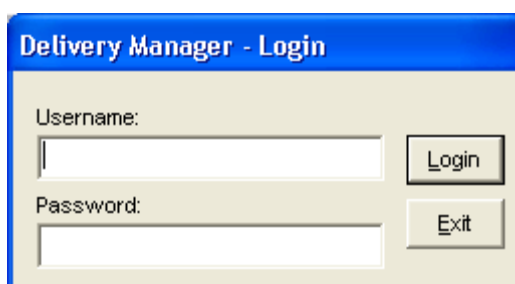
Using unscheduled break mode

There should be no breaks during the test. A candidate is considered to be on an unscheduled break whenever he or she leaves the test room, with or without permission. If a candidate needs to take a break (for medication purposes for example), you must put the test into unscheduled break mode and make sure the candidate leaves the test room. The test clock continues to run while the candidate is away. The candidate must be accompanied at all times and should not be allowed access to personal belongings. You must resume the test for the candidate after he or she returns from the break.

Remind the candidate that the test time will NOT stop counting down while he or she is on a break, then follow these steps:

1. **Press CTRL+SHIFT+F12 on the candidate's workstation.**

   The following dialog box displays:

   ```
   Delivery Manager - Login

   Username:
   [                    ]    [ Login ]

   Password:
   [                    ]    [ Exit  ]
   ```

2. **Type the username and password for your Pearson VUE account and click the Login button.**

   The **Administrator Overrides** dialog box displays.
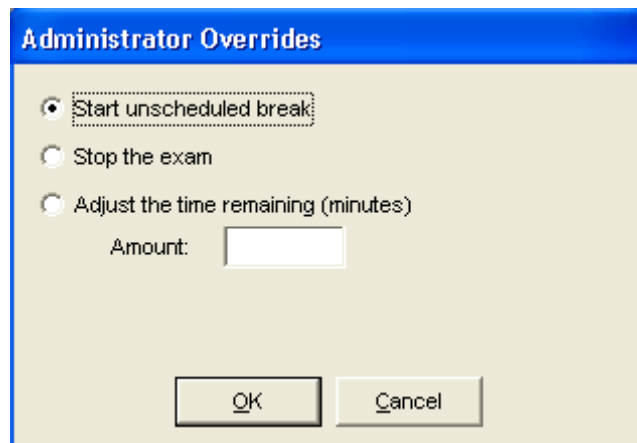
3. Click the Start unscheduled break option, and then click the OK button.

While the candidate is away, the test clock will continue to run. This means that the more break time the candidate takes, the less time he or she has left for taking the test.

The Active Break window shown below is displayed while the test is in unscheduled break mode. This window displays the candidate's name, the test title and how much time remains in the test and in the appointment.

- The **Amount Taken** value represents how long the candidate was away from the workstation. The **Amount Taken** value increases until the candidate returns, you click the **Resume** button and you log in to Delivery Manager.

- The **Total Time Remaining** value represents the amount of time remaining for all event items that are part of the test appointment. This includes the time allowed for the test itself, plus any time allowed for tutorials, surveys and so on. This value decreases until it reaches zero, meaning there is no time left for any of the event items in the appointment.

If the time runs out when the test is in unscheduled break mode, the following message is displayed: "The candidate's unscheduled break time has expired. Please resume the exam." After you click **OK** and log in, you will see a time-out message. Click **OK** in the message box to end the appointment.

4. **When the candidate leaves the test room for the break, verify his or her identity against the Primary ID.**

5. **When the candidate returns from the break, recheck his or her primary ID and escort the candidate back to his or her workstation, and click the Resume button in the Active Break window.**

   The following dialog box displays:
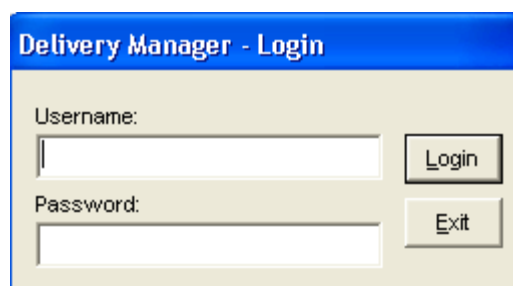
6. **Type the username and password for your Pearson VUE account and click the Login button.**

   The candidate can continue the test from where he or she left off. Do NOT manually adjust the amount of time the candidate has left for the test.

Stopping, resuming, restarting or extending a test

The test administrator can use the Administrator Override options to stop, resume or extend a test. The test administrator can also put tests in unscheduled break mode.

Whenever you stop, resume, restart or extend a test, you MUST file an Incident Report as soon as you have finished helping the candidate.

Stopping a test
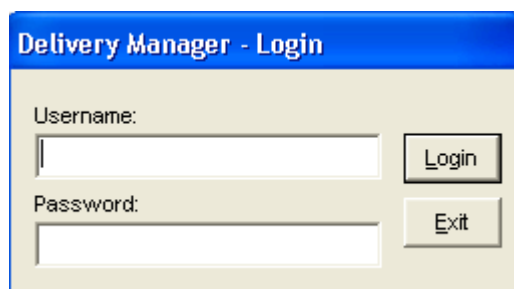
In some cases, you may need to use the procedure described in this section to manually stop a candidate's test. This procedure stops the test and the test clock so the candidate does not lose any testing time. The test can be resumed later, if necessary.

You may need to use this option if a candidate cannot finish a test due to illness or if an emergency or a major distraction occurs in the ITC, for example the building is evacuated.

Follow these steps to stop a test:

1. **Press CTRL+SHIFT+F12 on the candidate's workstation.**

   The Login dialog box is displayed.

2. **Type the username and password for your Pearson VUE account and click the Login button.**

   The **Administrator Overrides** dialog box is displayed.

3. **Click the "Stop the exam" option, and then click OK.**

This temporarily stops the test and the test clock so the candidate does not lose testing time. In the Appointment Selection window, the test will show a status of Started.

4. File an Incident Report as soon as possible.

Resuming a test

To resume a test that you have stopped using the procedure described in a previous section, go to the Appointment Selection window in Delivery Manager and double-click the test's entry just as if you were starting the test for the first time. The test will pick up where the candidate left off when the test was stopped.

Be sure to file an Incident Report as soon as possible.

If a test needs to be restarted more than 5 times, an authorisation window will pop up, and you will need to obtain an authorisation code from VSS in order to resume the test. Follow the steps below.

1. Go to the Appointment Selection window in Delivery Manager.

2. Select the exam entry and click Start.

An Authorisation window will pop up with the challenge key pre-filled.
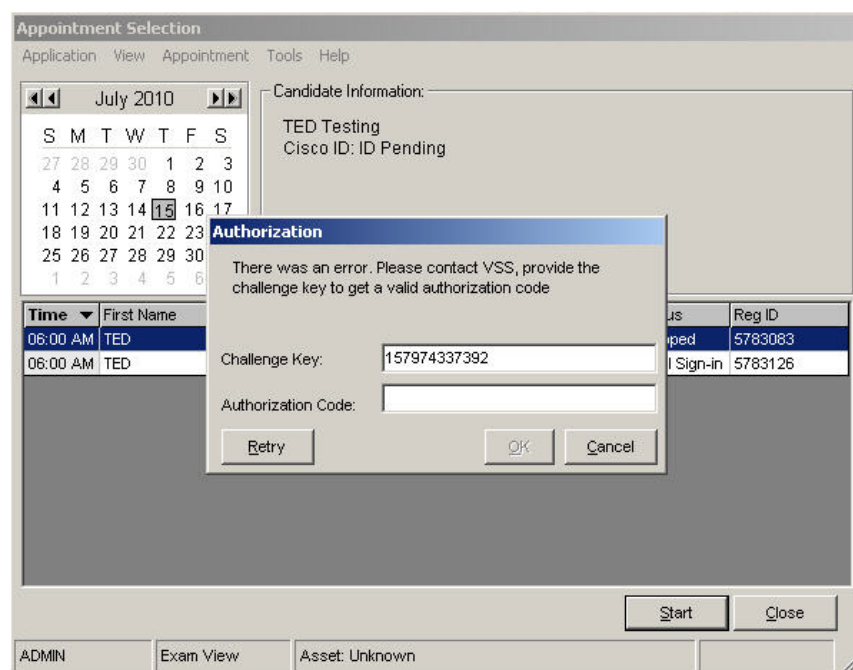
3. Write down the challenge key and contact VSS.

Provide the challenge key to VSS and VSS will give you a numeric 12-digit Authorisation Code.

4. Enter the Authorisation Code in the box and click OK.

5. **The test will resume where the candidate left off when the test was stopped.**

Be sure to file an Incident Report as soon as possible.

Restarting a test on one workstation

A test can be restarted only under special circumstances. Typically this will be only after technical problems have occurred and it was not possible to recover the test.

Complete the following steps to restart a test:

1. **Stop the test.**

   The **Appointment Selection** window appears.

2. **Right-click the appointment in the Appointment Selection Window and select Restart Appointment.**

   An Authorisation Code window appears.

3. **Contact VSS to obtain an Authorisation code.**

   An Authorisation code is necessary for any test to be restarted. Since a technical problem is the likely cause for the test requiring a restart, VSS will probably already be involved. VSS will need to know the challenge key number which can be found in the Authorisation Code window.

4. **Enter the Authorisation code when the Enter Authorisation Code window appears.**
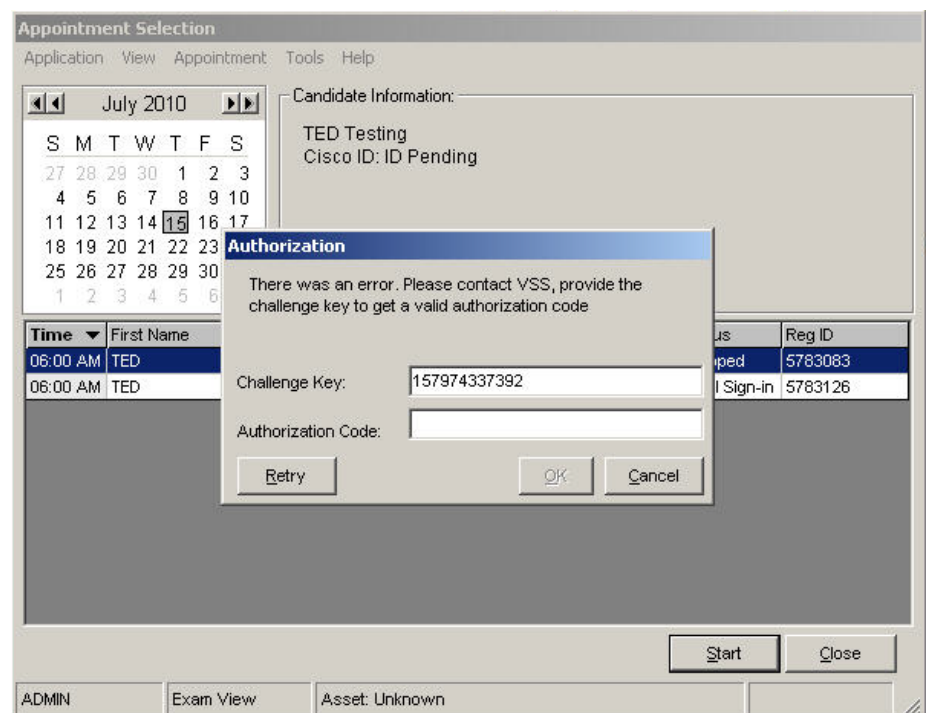
5. **Click OK.**

A confirmation message will appear stating that the test will be restarted and that all previous test result information will be erased. Click **Yes** to proceed with restarting the test.

Restarting a test on multiple workstations after a power outage or system failure

In the event of a power outage or system failure, you will need to obtain an authorisation code to start the tests on all of the delivery workstations.

Follow the instruction below to obtain an authorisation code.

1. When you click on the start button, an Authorisation window will pop up as shown below.

2. Call VSS to obtain an Authorisation code.

You must provide VSS with the Challenge Key in the Authorisation window in order to receive an Authorisation Code.

3. Enter the Authorisation Code into the box and click OK.

The Authorisation Code from VSS will be a 12-digit, numeric code. Be sure to tell VSS how many tests you will be delivering that day. VSS will provide you with a multi-pass Authorisation code that can be used for every test that day. However, if you have more tests than the number you gave to VSS, the number of authorisations that the multi-pass can be used for will run out. You will need to call VSS and get a new Authorisation Code.

If you have only started and entered the multi-pass Authorisation Code on one workstation, you will not be required to enter the Code on any of the remaining workstations, unless the number of authorisations has run out.

Changing amount of time remaining

The procedure described in this section allows a test administrator to extend the length of a test. You may need to use this feature if a candidate lost test time due to technical problems, a fire drill or an emergency, and you did not have the opportunity to stop the test in advance, or if a candidate has reading difficulties and requires a time extension. It is the test administrator's responsibility to assess the amount of time that the candidate lost, **but you need to contact VSS before adding time to a candidate's test.**
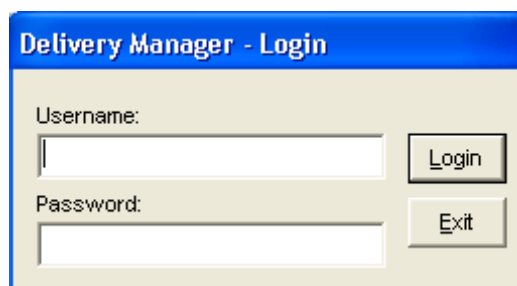
To change the amount of time remaining in a test, follow these steps:

1.   **Contact VSS to obtain an Authorisation Code.**

    An Authorisation code is necessary for any test time to be extended. VSS will need to know the Registration ID number of the test that needs a time extension.

2.   **Press CTRL+SHIFT+F12 on the candidate's workstation.**

    The Login dialog box is displayed.

3.   **Type the username and password for your Pearson VUE account and click the Login button.**

    The **Administrator Overrides** dialog box is displayed.

4.   **Click the Adjust the time remaining option, enter a time amount and click OK.**

Use this feature to *add or subtract time*. Type the amount (in minutes) in the Amount field. To subtract time, type a minus sign in front of the number.

5. **Click OK.**

   The **Enter Authorisation Code** box appears.

6. **Enter the Authorisation code and click OK. The time adjustment is applied and is shown in the exam window.**

   The time is added to or subtracted from the test time remaining for the candidate. The candidate can resume the test where he or she left off.

7. **File an Incident Report as soon as possible.**

Signing Out Candidates

This chapter contains the following sections:

Ending a test

❖ If the test ended normally, the Delivery Manager Login dialog box displays on the candidate's screen after the test ends. (Best practice is to require candidates to raise a hand to signal to the test administrator when the test ends). Be sure this dialog box is displayed; if it is not, ask the candidate to click the **End Exam** button if he or she is finished. Enter the username and password for your Pearson VUE account and click **Exit** to close Delivery Manager on the workstation.

❖ If a candidate terminated a test before the test ended (for example, the candidate was ill and had to leave the ITC or misconduct occurred), stop the test, and file an Incident Report.

❖ Note that some tests allow candidates to review their answers at the end of the test. The review time is included in the test time, so time could expire before the candidate has finished reviewing.

Closing Delivery Manager

After a test has been delivered, you need to close Delivery Manager on the candidate's workstation. For security reasons, you must close this window whenever a test is not in progress on a delivery workstation. Because a username and password must be entered in order to exit Delivery Manager, candidates cannot exit the application and display the Windows desktop.

Follow these steps to close Delivery Manager:

1. **If the Appointment Selection window is displayed, as shown below, click the Close button. If the Login window is displayed, continue with step 2.**

   This window displays on the candidate's workstation if you stopped the test using the override options.

2. **When the Login dialog box is displayed, enter the username and password for your Pearson VUE account and click the Exit button.**

   The Delivery Manager application closes, and the Windows desktop is redisplayed.

   The same user does not need to both open and close Delivery Manager. For example, if another test administrator started Delivery Manager, you can enter your own username and password in order to close it.

Sign-out Checklist

The Sign-out Checklist lists all sign-out procedures. The VSS web site contains a copy of the list that you can duplicate and keep at the front desk for easy reference.

Completing the ITC test log

As part of the sign-out procedure, ensure that the candidate's entry on the test log is complete.

❖   Sign your name next to test administrator signature on the right side of the test log sheet. Ensure that all fields of the test log have been completed and signed before the candidate leaves the ITC.

❖   You must complete and file test logs each day and keep them at your ITC for a minimum of 2 years. Test logs must be made available to CITB for auditing purposes at all times.

Distributing the score reports

In order to score a test, the candidate must completely exit out of the test. A score report is then immediately provided for the candidate.

One copy of the score report will print automatically when candidates finish their tests. The score report prints whether the candidate passes the test or not.

Follow the procedure and guidelines below for distributing score reports:

1.   **Do not distribute the score report until all sign-out procedures have been completed.**

2.   **As the candidate approaches the administrator workstation, verify their name by asking to see the primary ID they took into the test room. Verify that the name on the score report matches the name of the candidate.**

   Do not distribute the score report to anyone other than the candidate. Information identifying or describing the candidate, a candidate's scores and performance, a candidates' participation in testing, and other information relating to each candidate is private and highly confidential between the candidate, CITB and Pearson VUE.

   While we understand that a test administrator is not familiar with the particular details of every score report, the goal is to make sure you check the score report before handing it to the candidate. Some examples of what you are looking for include:

   •   The name on score report is not the candidate's.

   •   Strange characters are printed on the page (e.g. part of the text is in non-English characters or there are lots of boxes (i.e. □ □ □) or other strange characters)

   •   There is an additional page that doesn't look like it belongs with the score report. This could be a candidate roster that was left sitting on the printer, somebody else's score report, or some other content that looks unusual to the test administrator.

   In the event that you notice a problem or anything unusual with the score report, please take the following action:

- Contact the Program Coordinator who will create an urgent incident titled "Problem with Exam Results." To do this, contact candidate services and select Option 1.

It is extremely important that candidates receive the proper score report and that the score report they receive is accurate and complete. Do not give the score report to the candidate until the issue is resolved. The ITC should retain the original score report in a secure place until further instructions are provided.

If the issue cannot be resolved at the ITC, please advise the candidate that a corrected score report will be generated and sent to them in the post. Notify the candidate that he or she should contact the Call Centre for more information.

3. **Hand the score report to the candidate face down and folded in half without discussing or commenting on his or her results.**

When presenting a candidate score report, do so privately and respectfully. **If necessary and possible, take them into another room.** Try not to give away the results with body language or verbal gestures. Sometimes due to emotional anticipation, a candidate will request their score report be placed in an envelope. It is ok to comply with the request. Doing so may prevent an emotional outburst at the ITC.

NEVER try to explain the results of a candidate's score.

The scoring process is the culmination of the candidate's hours of study, anxiety, and future hopes. This time can be very emotional for a candidate and very unpredictable for test administrators. If a candidate becomes distraught and begins yelling at the test administrator, stay calm and instruct the candidate to contact the Call Centre if they have specific issues with their score report. In addition, the test administrator should document the incident in an Incident Report.

Note: The score report *may* indicate "PASS" or "FAIL" with diagnostic information.

If a candidate who has just been scored wants to wait in the registration area to be picked up because of inclement weather, permit the candidate to wait inside and remember to be discreet when presenting results to other candidates.

Reprinting score reports (reprint utility application)

If a score report did not print, you need to print it for the candidate. To do this, go to the administration workstation, click the **Start** button on the taskbar and choose **Programs | VUE Applications | Reprint Utility.**

The Delivery Manager Application launches and the Login window appears. (Note that this version of Delivery Manager cannot be used to start, stop, or resume tests since those functions are disabled in this version. The introductory screen for this version is labelled "Reprint Functionality Only" to indicate this.)

Log in with your username and password for the Pearson VUE applications. After you log in, the Appointment Selection window displays. Click the name of the candidate whose report you need to reprint, and click the **Reprint** button. After the report prints, click **Close**, enter your login information, and then click **Exit**.

Using the Reprint Utility, an ITC can reprint a candidate's score report up to seven days after his or her test appointment. After that, the candidate needs to contact the Pearson VUE Call Centre for assistance.

Handling comments, questions and complaints

❖ If a candidate mentions any type of complaint or problem related to the test or the testing experience, you must file an Incident Report. Be sure to make the report as detailed as possible and assure the candidate that the issue will be directed to the appropriate person and addressed promptly.

Handling Incidents & Communicating with Pearson VUE

This chapter contains the following sections:

About Incidents

What are incidents?

An *incident* is any issue or problem that occurs at your ITC and needs to be addressed by someone within the Pearson VUE organisation. Incidents fall into two main categories:

❖ A *candidate incident* is any event that may affect a candidate's test, his or her ability to be seated for the test and his or her performance on the test. This includes weather emergencies, software or hardware problems and candidate identification issues. When *any* unusual event occurs that affects the testing environment, you must report it as soon as possible. It is the test administrator's job to take all such incidents very seriously and report them so they can be addressed appropriately.

❖ A *non-candidate incident* is an issue that you need assistance with or a question you have that is not a high priority and does not affect candidate tests. This might involve a question about a software feature or a problem you find with the ITC Policies & Procedures Guide.

As an example, perhaps you have an issue with a feature in the Admissions Manager application. If you are merely curious about the feature because you have never needed to use it, we call it a *non-candidate incident*. If the feature is required to admit candidates, and all of a sudden it is not working when you are trying to admit a candidate, we call it a *candidate incident*.

Pearson VUE's incident reporting system

Both candidate incidents and non-candidate incidents must be reported using the Incident Reporting System, which is available through the VSS web site. This system allows Pearson VUE to collect information about incidents and track the incidents until they are resolved. The system is available to ITCs and all Pearson VUE employees who may be involved in resolving incidents, such as VSS representatives and Call Centre agents.

Reporting an incident involves providing as much information as possible about the issue, such as when it occurred, who was involved, where it occurred and which software or hardware was being used. When you file an Incident Report, you specify whether the incident is a candidate or non-candidate incident. You then use a step-by-step process to fill in detailed information. The system automatically fills in some information, such as the current date and time, your name and your ITC name.

The system automatically assigns a *priority level* to the incident, based on the information you entered. The priority level is used to determine how quickly the incident must be addressed.

❖ **Urgent --** Indicates a loss of service or serious impairment to service, which cannot be circumvented.

❖ **High --** Indicates problems that impede, but do not impair services. Usually these lead to Urgent problems if not resolved.

❖ **Medium --** These are issues that do not affect service and do not affect the ITCs ability to deliver or administer tests.

❖ **Low --** These are issues that do not affect service and have no effect on test delivery or administration.

After you have submitted an Incident Report, the system assigns an incident number. This number allows you to quickly look up the Incident Report in the future to see how it was addressed or what progress has been made.

As soon as a report is filed, an incident is automatically assigned to the appropriate Pearson VUE employee based on the incident type. This employee analyses the issue and contacts the person who reported the incident within a specified amount of time. For example, if an incident's priority level is Urgent, the goal is to contact the reporting person within 10 minutes from the time the incident was reported. (The system automatically assigns a priority level to an incident based on its type.)

While an Incident Report is open, you can go to the VSS web site to view details about it and to check which actions have been taken. You can also enter comments and any additional information about the incident that you may have received. When you enter comments, an email message is automatically sent to the person assigned to the incident.

Pearson VUE has specific goals for how long it should take to resolve incidents. For example, the goal is to address *Urgent* incidents within one hour of being reported. Sometimes the employee who was initially assigned the incident is unable to resolve it for some reason. For example, perhaps some special action is required that must be approved by a Pearson VUE manager. In this case, the incident is *escalated* or reassigned to someone else within the organisation.

Before Incident Reports are closed, Pearson VUE employees ensure that the solution is working and that the issue has been resolved. Pearson VUE has a list of criteria that must be met before Incident Reports can be closed, and reports can be reviewed and reopened in the future if necessary.

When to report an incident

If either you or a candidate feels that an incident influenced the candidate's test experience or test results, it is your responsibility to report this as a candidate incident. Incidents that can affect a candidate's performance or the candidate's satisfaction with the test experience always warrant your attention. Medical emergencies, nearby construction or even another candidate humming in the test room are all examples of incidents that might distract candidates and affect their performance. Other examples might include a power outage, equipment failure, heating/cooling problem or suspected candidate misconduct.

Listed below are some examples of when Incident Reports must be filed. This list does NOT include every case. If you are unsure about whether or not an incident warrants reporting, call VSS or Channel Quality for assistance.

❖ Weather emergencies interrupt testing or close your ITC.

❖ A candidate mentions that a disturbance which took place could/did affect their performance on the test.

❖ Your ITC is unable to accommodate someone who arrives late for a test.

❖ A candidate does not have the proper identification.

❖ Approved accommodations are not available.

❖ Irregularities occur during the admissions process (for example, the candidate refuses to provide a signature or insists on bringing unauthorised personal belongings into the test room).

❖ A disturbance possibly affects a candidate's performance on a test.

❖ You suspect a candidate of cheating on a test or other candidate misconduct occurs.

❖ A candidate takes a break that is not permitted by CITB.

❖ A power disruption interrupts the testing process.

❖ Candidate misconduct occurs.

❖ A candidate questions the validity of portions of a test.

❖ A candidate brings a test question to your attention. The candidate might point out a logical inconsistency in the question, state that no correct answer was provided or complain about an implausible situation, among other things.

In the case of any form of candidate misconduct, inform the candidate that an Incident Report will be filed, and CITB will be notified of the incident.

Incident reports should include details of when the incident occurred, who was involved, where it occurred and which software/hardware was used.

Filing a report for a candidate incident

When an incident occurs that affects a candidate or the test environment, you must promptly report the incident to Pearson VUE by completing a candidate Incident Report. This report is essential and should be completed as soon as possible. **It is the responsibility of the test administrator to file all candidate incidents, even if the test administrator worked with VSS, Channel Quality, or Information Security.** VSS may file a separate non-candidate incident to track a technical issue.

An incident report (IR) *number* may be provided to the candidate that the Incident Report was created under. **However, <u>never</u> share the text and content of an Incident Report with candidates or anyone else outside Pearson VUE. Only the IR number may be shared with the candidate.**

Do not include confidential information such as credit card numbers, social security numbers, or ID numbers in the text of Incident Reports. Do not include test content or any description of test content in the incident report. Test content is defined as questions and response selections. If the candidate has a complaint about a specific test question, please ask for the question (item) number. File an incident report that includes only the item number.

Any questions from candidates regarding existing incidents should be referred to the appropriate Program Coordinator in the Call Centre.

For URGENT and HIGH types of incidents, and for any incident that affects candidates who are taking or waiting to take a test, please call VSS. When you call, be prepared to provide your ITC ID. The VSS representative you talk with will file the Incident Report. Ask him or her for the Incident Report number and his or her name. After the call, check the VSS web site and be sure the Incident Report is there and that it accurately reflects the problem you reported. Update the report with any new or additional information, and attach files to the report if necessary.

For LOW and MEDIUM types of incidents, you can go to the VSS web site and file the Incident Report yourself as described here.

Do not include several different incidents in one Incident Report. File separate reports for each incident that occurs. For example, if a candidate's test was interrupted by a power fluctuation and then the same candidate was later caught cheating, you would need to file two Incident Reports. It is important to do this, because incidents get assigned to different Pearson VUE staff members based on the incident type. The appropriate person may not get informed if several incidents are included in one report or there may be a delay in getting an incident resolved.

Follow these steps to file a report for a candidate incident:

1. **Go to the VUE Support Services web site (http://vss.pearsonvue.com) and log in.**

2. **Click the Incidents button in the upper right corner of a VSS web site page to display the Incidents page shown below.**
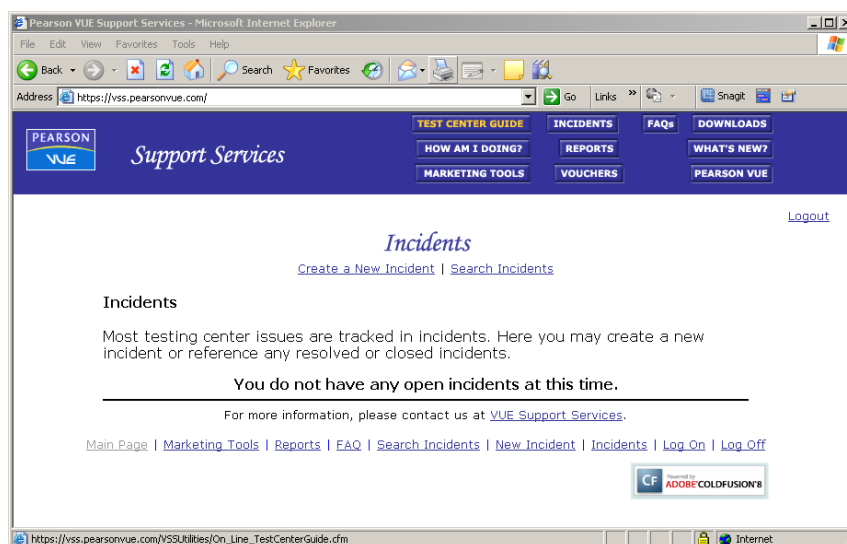
3. **Click the Create a New Incident link.**

The following page appears, requiring you to choose whether or not you are filing a candidate incident report.

4. **Choose "Yes, it does" and click the Next button.**

The next page requires you to select the candidate affected by the incident.

5. **Following the directions noted on the screen, select a candidate and click the Next Step button.**

The next page asks you to choose the topic that best describes the incident you are reporting, from one of several lists. Examples of the lists are shown at the bottom of this page; however, items are frequently added, so the list may have changed since this guide was produced.
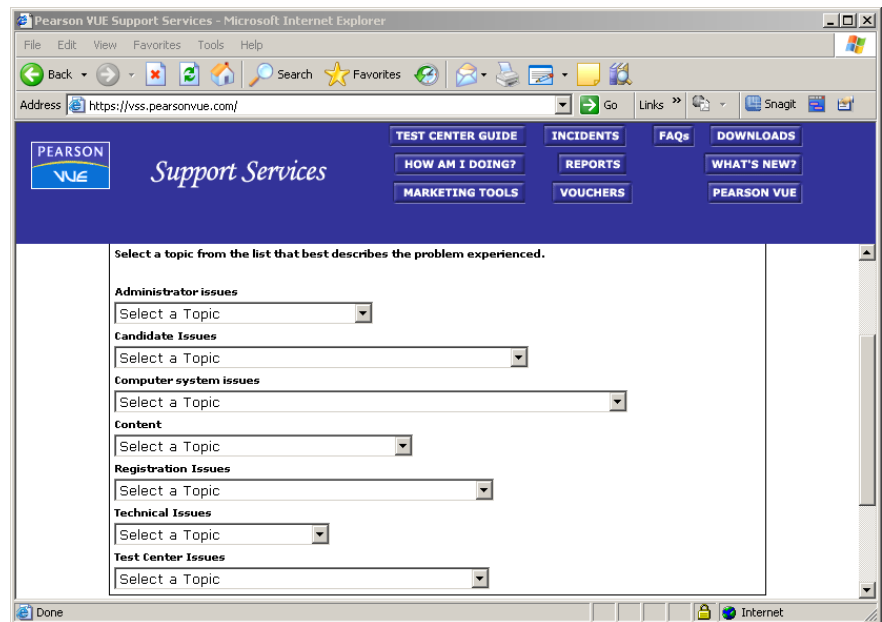
6. **Click one of the topic lists and select a topic.**

    A new page automatically displays, asking you to further describe the topic by selecting a detail option. The options that are available are based on which topic you chose in the previous step. For example, if you choose the "Problem with candidate identification" topic from the Candidate Issues list, the list shown below is displayed.
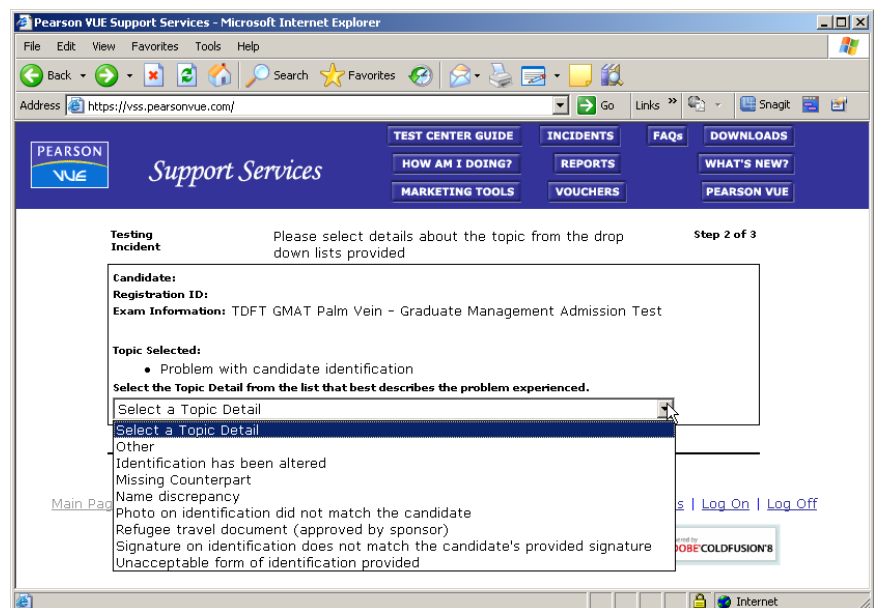
7. **Click the topic detail list and select an option.**

    The next page asks you to select or enter additional information about the incident.

8. **Select one or more actions that you took in relation to the incident, select the physical area of the ITC to which the incident relates and type a detailed description of the incident.**

    Be as thorough as possible when entering details about the incident.

9. **Choose Low or Medium from the Priority list, and click the Next Step button.**

    The next page asks you to select other candidates affected by the incident and witnesses to the incident.

10. **Select or enter candidates and witnesses and click the Next Step button.**

    The next page displays the Incident Report for your review, as shown below.

11. **Verify that the Incident Report is correct, then click the Submit Testing Incident button at the bottom of the window.**

The number assigned to the Incident Report is displayed on the screen.

Filing a report for a non-candidate incident

Follow these steps to file a report for a non-candidate incident. A *non-candidate incident* is an issue that you need assistance with or a question you have that does not necessarily affect candidate tests.

1. **Go to the VUE Support Services web site (http://vss.pearsonvue.com) and log in.**

2. **Click the Incidents button in the upper right corner of a VSS web site page to display the incidents page shown below.**

3. **Click the Create a New Incident link.**

    The following page appears, requiring you to choose whether or not you are filing a candidate incident report.

4. **Select "No, it does not" and click the Next button.**

    The New Incident Page displays as shown below. Use this page to enter all information related to your question or problem.

5. **Select or enter information in each field as described below.**

   - **Subject --** Type a brief description of the issue.

   - **Incident Type --** Choose a type from the list.

   - **Priority --** Choose a priority level of Low or Medium. This affects how quickly the issue must be addressed by Pearson VUE staff.

   - **Problem Type --** Select a type that best describes your issue. Options include Installation Questions, Network Issue and Security.

   - **Description of Problem --** Type a detailed description of the issue, including as much information as you can.

6. **Click the Submit Incident button.**

   A message informs you that the Incident Report was created. Your incident is now listed on the main page of the VSS web site.
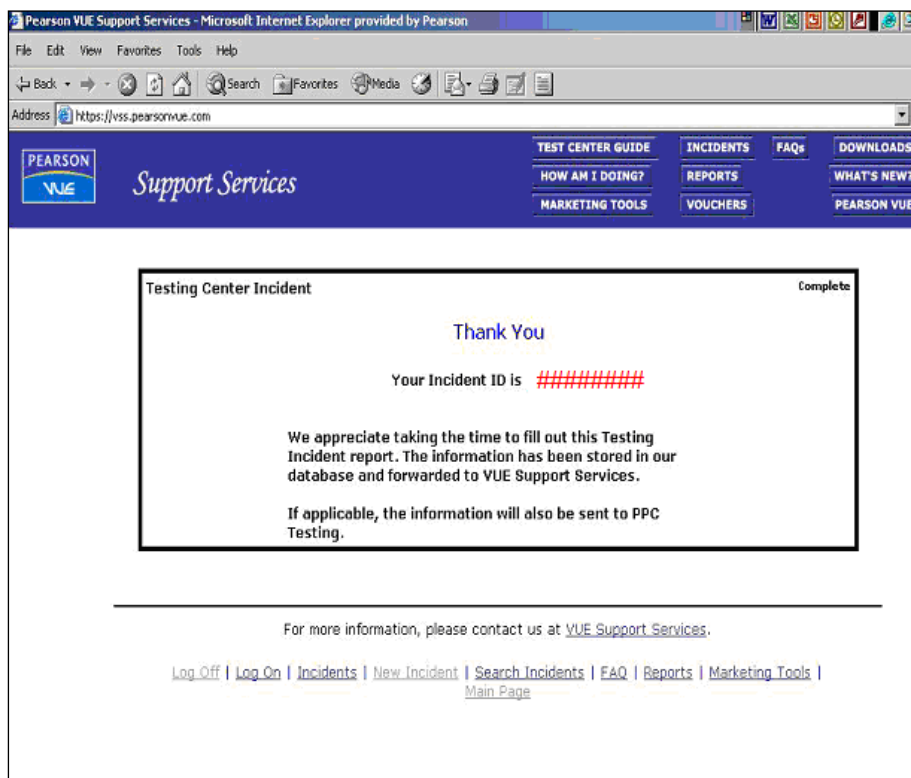
Working with existing incidents: Viewing incident reports

You can quickly view Incident Reports associated with your ITC directly from the VSS web site. Follow these steps:

1. **Go to the VUE Support Services web site (http://vss.pearsonvue.com) and log in.**

2. **Click the Incidents button in the upper right corner of the VSS web site page to display the incidents page shown below. Use one of the following methods to display the incident:**

    - All open incidents are listed on the main Incidents page. To view an open incident, click the Incident ID in the left column to display the Incident Report.
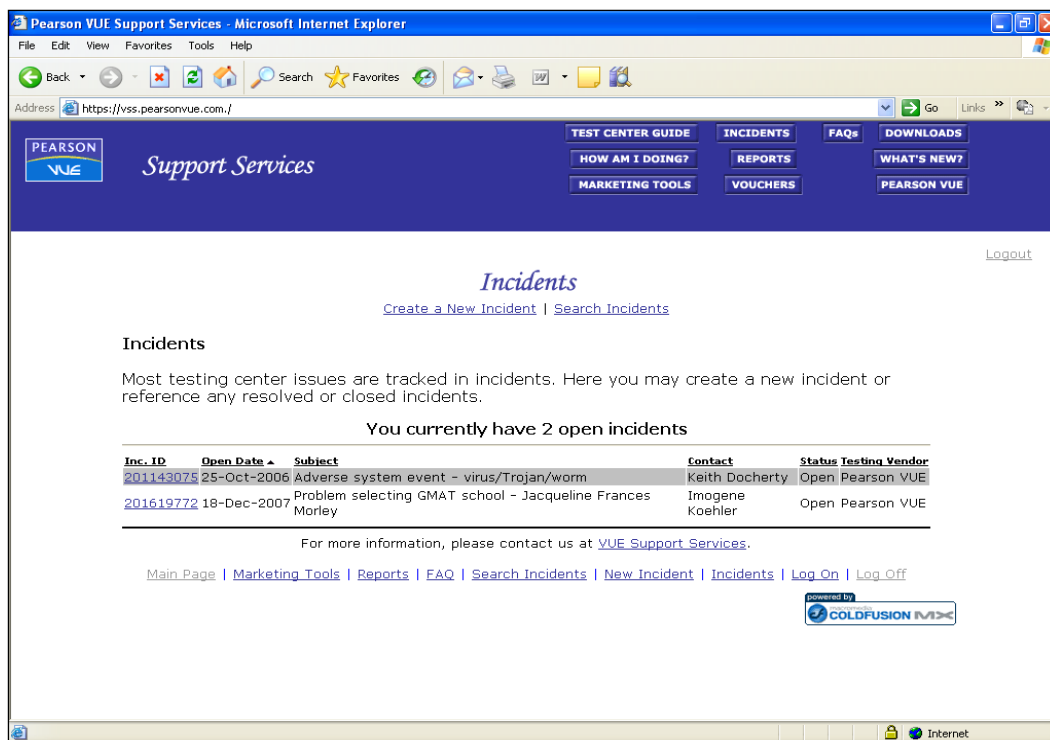
- To search for an incident, click the **Search Incident** link shown in the previous illustration. When the Incident Search page shown below is displayed, type or select your criteria, and then click the **Search** button.

  The Incident Finder page then displays a list of Incident Reports that match your criteria. Click the Incident ID for the one you want to view or add comments to.

  After you have clicked an **Incident ID**, an Incident Details page displays as shown below. All of the information you entered for the incident is listed.

If you have previously added comments to the report or if someone at Pearson VUE has taken some action (such as reassigning the incident to a different employee), that information is shown at the bottom of the window in the Customer Comment and VSS Comment areas.
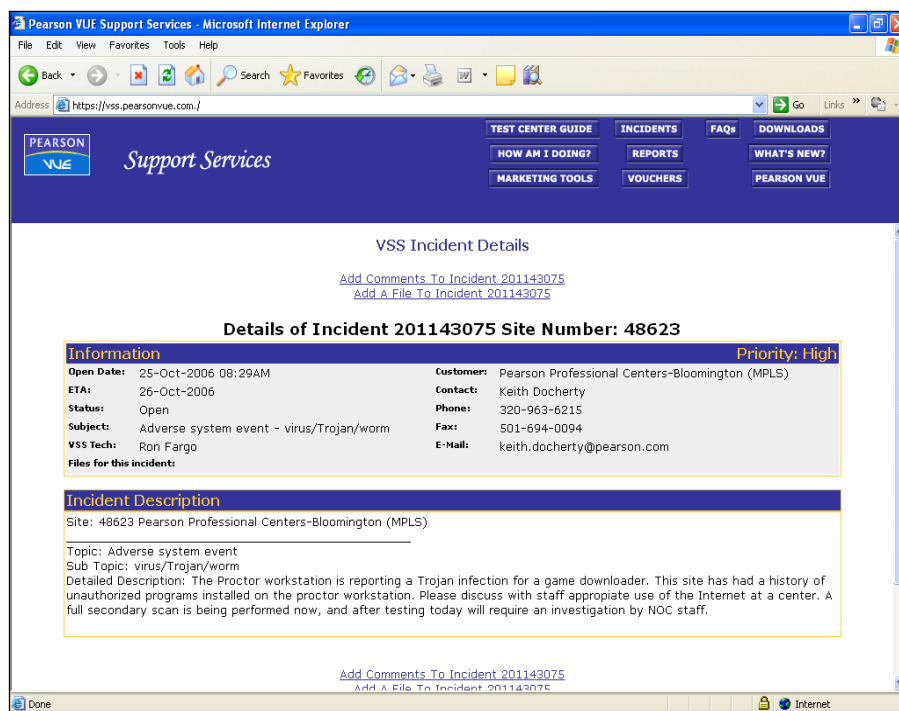
Adding comments to an incident report

You will often need to add comments to an incident report. For example, you may have some additional information or a correction you want to make or Pearson VUE may ask you for more information about an incident. Adding comments to an incident report is a quick way of communicating with Pearson VUE about an incident. It also allows you and the Pearson VUE staff to compile all incident information in one place.

Follow these steps to add comments to an incident report:

1. Display an existing incident report, as shown below.

2. **Click the "Add Comments to Incident" link.**

    The Add Comments page displays, allowing you to enter additional information.

3. **Type your comments and click the Submit Update button.**

    A message informs you that the change has been entered in the system. When you view the incident report again, your comments will appear at the end of the report.

Attaching files to incident reports

Another feature of the Incident Reporting System is the ability to add a file to an incident report. This feature can be used to add one or more relevant files, such as a screen capture that may help Pearson VUE in responding to your incident report. You can attach a file to any incident report that has been assigned to a specific person at Pearson VUE. After you attach a file to an incident report, the Pearson VUE staff can view the file.

1. **Display an existing incident report, as shown below.**

2. **Click the "Add a File To Incident" link.**

The following dialog box appears:

3. **Click the Browse button, select the file you want to attach to the incident report, and then click the Open button.**

   The file path and name you selected displays in the field next to the **Browse** button.
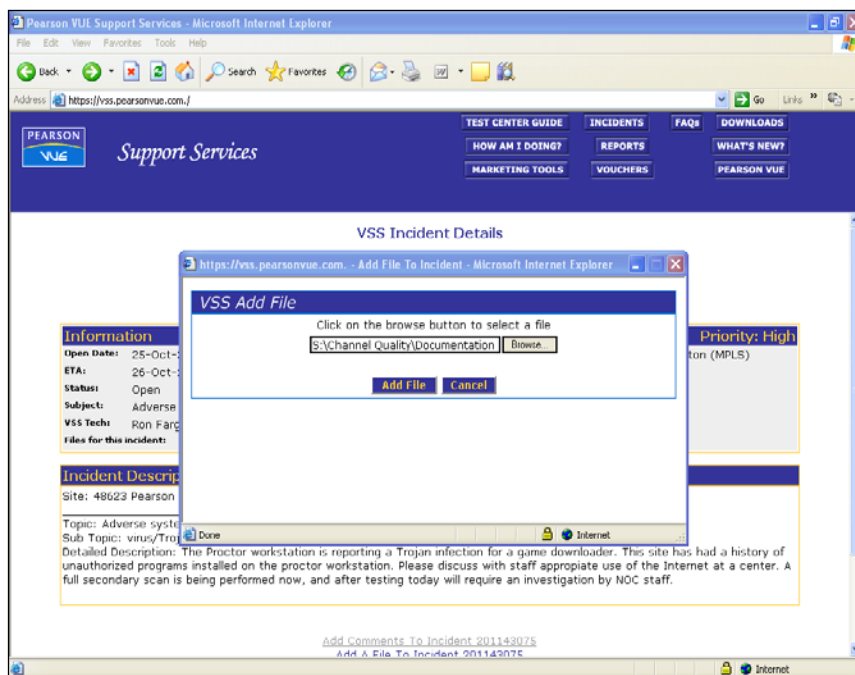
4. **Click the Add File button.**

   A "Please Wait" message appears in the dialog box while the file is uploaded. After the file has been uploaded, a confirmation message lets you know the file has been attached.

5. **Click the Close button to close the dialog box.**

   The file you attached will now be available to Pearson VUE personnel for viewing. To verify that the file was attached, view the incident report and look for the filename as shown below.
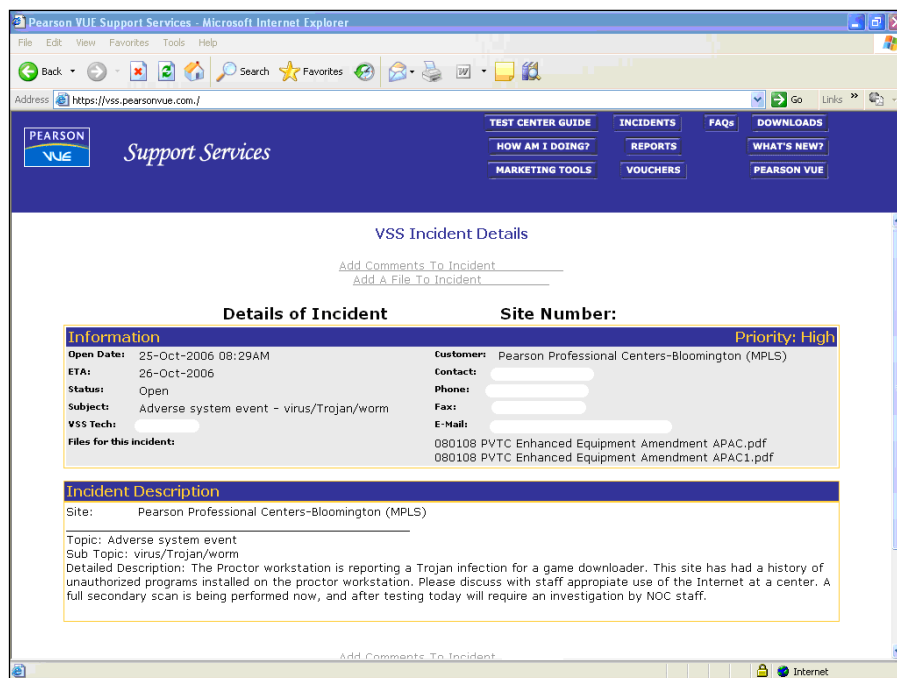
Addressing incidents assigned to you

Test administrators are responsible for addressing incidents that are assigned to them. For example, a test administrator may be assigned an incident relating to missing candidate results. A test administrator could also be assigned incidents related to customer service, such as a candidate reporting that the ITC was closed when he or she arrived for a test. In these cases, the test administrator may be required to provide details about the incident and then discuss it with someone in the Channel Quality group at Pearson VUE.

Whenever you are required to address an incident, you will receive an email message. This lets you know that you need to log on to the VSS web site, find the incident report and determine what needs to be done. Depending on the incident type, you should either update the incident report with detailed information or call VSS to get help in handling the incident.

Responding to specific incident types

This section contains general information about responding to specific types of incidents. Although preservation of the test environment is one of your major responsibilities, the safety of ITC personnel and the testing candidates should always be the primary consideration. For example, if there is a severe weather warning, your ITCs emergency procedures should be promptly followed and the test concerns addressed later. If a candidate talks during the test, you should instruct the candidate to remain silent. If the candidate becomes difficult to handle, you should leave the test room, (only if another test administrator can continue the invigilation process), call building security or the police, and allow them to escort the disruptive candidate from the ITC. Never put yourself in a dangerous situation.

Candidate questions test validity/content

On rare occasions, a candidate will question the validity of a test or its content. After the candidate leaves the ITC, file an incident report with complete details, including the item number(s) on the test. However, do not include test content or any description of test content in the incident report.

If the candidate has a complaint about a specific test question, please ask for the question (item) number. File an incident report that includes only the item number.

Technical problems

If a technical problem occurs during a candidate's test, follow the guidelines listed below:

❖ Write down the error message, if one appeared on the screen. If possible, stop the test. Then escort the candidate out of the test room and call VSS.

❖ If the problem cannot be resolved within 30 minutes, ask the candidate if he or she is able to wait or would prefer to reschedule the appointment. If the candidate has any questions, he or she must contact the Call Centre. Be sure to document this in an Incident Report.

❖ If the candidate waits and you are able to resume the test, determine whether or not the candidate lost any test time due to the problem and add time to the test if necessary and possible. In most cases, the test will resume where it left off. If you cannot resume the test, or if you need to add test time, contact VSS.

Emergency procedures

The physical safety of the candidate and ITC personnel should be the first priority in the event of any emergency or crisis.

If the ITC must be closed because of an emergency, contact Pearson VUE as soon as you are able.

You should be aware of how to use the fire extinguisher(s) in or near your ITC.

A site plan of the ITC should be on display inside the test room with fire exits and assembly points clearly displayed.

In the event of an emergency, general guidelines are listed below.

❖ If candidates are in the ITC, turn off the workstation monitors, *if you can do this while safely evacuating the ITC*. If the situation is critical, do not spend time resolving technology issues.

❖ Calmly inform candidates that there has been a development that requires the evacuation of the ITC.

❖ Do not allow candidates to remove personal items from the lockers, as this will cause confusion and delay.

❖ If time and safety permits, call 999 or the emergency phone number in your area.

❖ If the ITC/building needs to be evacuated, such as in the event of a fire, lead the candidates out in as orderly a fashion as possible. Try to evacuate utilising the safest route available.

❖ When the building is cleared for re-entry, return to the ITC and check for any damaged or missing test equipment or supplies. Contact VSS immediately if you need help with resuming or restarting candidates' tests or if workstations have been damaged.

Under no circumstances should ITC employees or candidates re-enter the building until the building has been cleared by the professional emergency authority.

Power outage

In the event of electrical failure, determine if the failure is building-wide or isolated to the ITC. Call the local property manger or power company immediately to report the outage. Inform candidates that the ITC staff are taking the necessary steps to get the electricity restored. Have candidates remain at their workstations so testing may resume as quickly as possible once electricity is restored. Contact VSS as soon as possible.

Medical emergency

In the event of a medical emergency involving a candidate, remove the candidate from the test room, if possible. Remove the candidate *only* if you are certain that to do so will not injure the candidate or further complicate the injury or condition. Call 999 or the local paramedic or emergency services and file an incident report as soon as you can.

Burglary or unauthorised entry

If you arrive at the ITC and there is evidence of forced entry, do not enter the ITC. Wait for the police in a safe and secure area such as the building lobby. When the ITC is cleared for re-entry, return to the ITC and check for any damaged or missing test equipment or supplies. Contact VSS or Channel Quality to report the incident.

Using On-Line Reports and Resources

This chapter contains the following sections:

Logging in on the VSS web site

In order to use the VSS web site, your testing system account must be assigned the "May use the VSS web application" permission in Site Manager. The default name and password (admin, admin) cannot be used to log in to the VSS web site.

Follow these steps to log in to the web site:

1. **Using your web browser, navigate to the VSS web site at http://vss.pearsonvue.com.**

   The welcome page displays, as shown below.

2. **On the welcome page, type your username and password for the Pearson VUE™ Testing System applications and enter your site ID. Next, click the Login button.**

If you are a new user logging into VSS for the first time and you have never logged into Site Manager, you will be prompted to create a new password and to select your security questions, as shown below.

The security questions are utilised if you forget your password or if you are locked out of your account after three unsuccessful log-in attempts. If you forget your password or get locked out of your account, you must contact the chief administrator at your ITC with the permission to reset passwords/unlock accounts. If they are unavailable, contact VSS.

After creating your new password and selecting your security questions, click the **Save Changes** button. You will then be logged in to the VSS web site.

However, if you are an existing user *with access to Site Manager* and your password has expired OR you haven't yet selected your security questions yet, you should log into Site Manager first before accessing VSS, connect to the hub, and change your password and/or select your security questions. Once your password has been changed, you may log into VSS with your new password.

If your password is expired and you are accessing VSS from an external location without access to Site Manager, you will be required to change your password after logging into VSS. You will be prompted to enter your current (expired) password and a new password. Once you click ok, you will then be logged in to the VSS web site.

A message may appear at the top of the screen informing you that RMA must first run at your site before the password and security questions are in sync with the Pearson VUE system. If you need to sync your password prior to the nightly Maintenance Cycle, you may run a manual RMA to replicate your account changes. If you need further assistance, please contact us at VUE Support Services. Until your RMA has updated your account information, you may not be able to launch some of your applications at your ITC.

Since the VSS web site is shared by all Pearson VUE test centres, not all of the messages displayed will be applicable to your ITC.
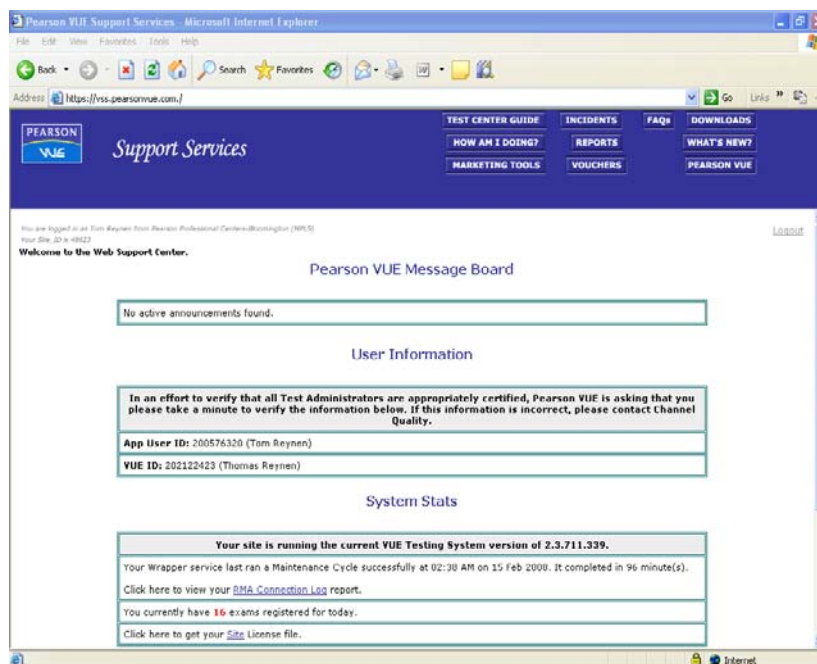
3. **After 3 consecutive unsuccessful log-in attempts, your account will be locked.**

    If your account is locked, you must contact the chief administrator at your ITC with the permission to reset passwords/unlock accounts. If they are unavailable, you may contact VSS. They will ask for the answers to your security questions. You must provide the answers before your account can be unlocked. Once your account is unlocked, you may return to the VSS web site and log in.

If the VSS administrator only unlocked your account, you may return to the VSS login screen, enter your user name and password, and then click Login.

If the VSS administrator generated a new password, which can only be used once, they will tell you the new password. You may return to the login screen, enter your user name and the new password provided by VSS, and then click Login. You will be prompted to provide a new password before being able to access the VSS web site.

You will NOT be able to unlock your own account.

Once you are signed in to the VSS web site, the **VSS Message Board** page is displayed, as shown in the next illustration. The top section of the page contains Pearson VUE announcements.

Under the **System Stats** section of this page, you will see how many tests are scheduled for the day.
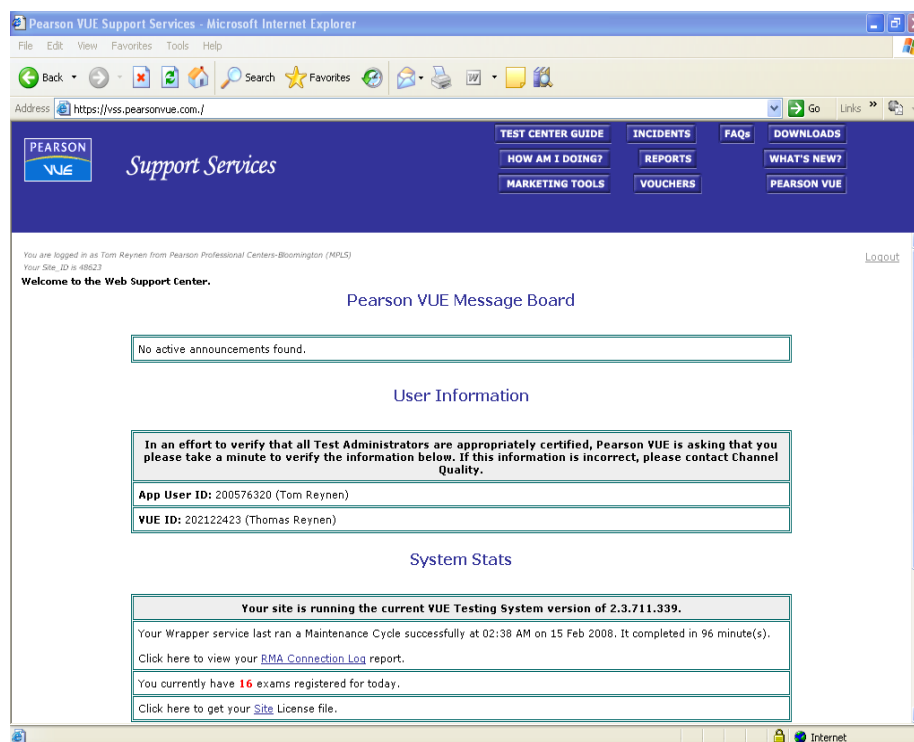
VSS web site features

The main features of the VSS web site are listed below:

❖ **Message Board/System Stats** -- This is the first page that displays after you log in to the web site. You use this page to view your ITCs RMA connection log report. You must check this to ensure that all tests were downloaded and uploaded properly and to ensure that RMA is running properly.

❖ **FAQs** -- The Frequently Asked Questions area helps you install and use your testing system and troubleshoot problems. When you encounter issues, check here first to see if your question has already been answered.

❖ **Reports** -- Test administrators should use the Reports page on a daily basis to check the ITCs schedule, find CITB information and get historical reports on tests delivered at their ITC.

❖ **Incidents** -- Use this page to quickly file Incident Reports. In addition, you can check the status of any of your ITCs open incidents, send incident comments and questions to Pearson VUE staff, and review your ITCs past incidents.

❖ **What's new?** -- This page provides Pearson VUE news that is of interest to ITCs.

❖ **Test Centre Guide --** The Test Centre Guide tab takes you to the online versions of the ITC Policies & Procedures Guide and Exam Sponsor Guide.

❖ **Downloads (File Download Utility)** -- The Downloads page allows you to get master copies of the ITC Test Log, the Candidate Rules Agreement, Waiver Form, Parental Consent Form and other forms and documents. This is the one central location for all CITB documentation.

You can also use this page to view your ITCs RMA connection log report. We suggest that test administrators visit this page at least every other week.

Reports

The Reports link on the VSS web site provides several different types of reports that allow you to see information related to your ITC. Test administrators should be familiar with these reports and use them frequently.

You can access the following reports by clicking the **Reports** button from any page on the VSS web site:

❖ **Exam Schedules** -- Lists tests scheduled at your ITC for the current day or a selected time period. You can display the schedule in either list or chart form.

❖ **Exam Sponsor Info** -- Provides information about the tests offered by CITB. The information includes the type and length of tests available.
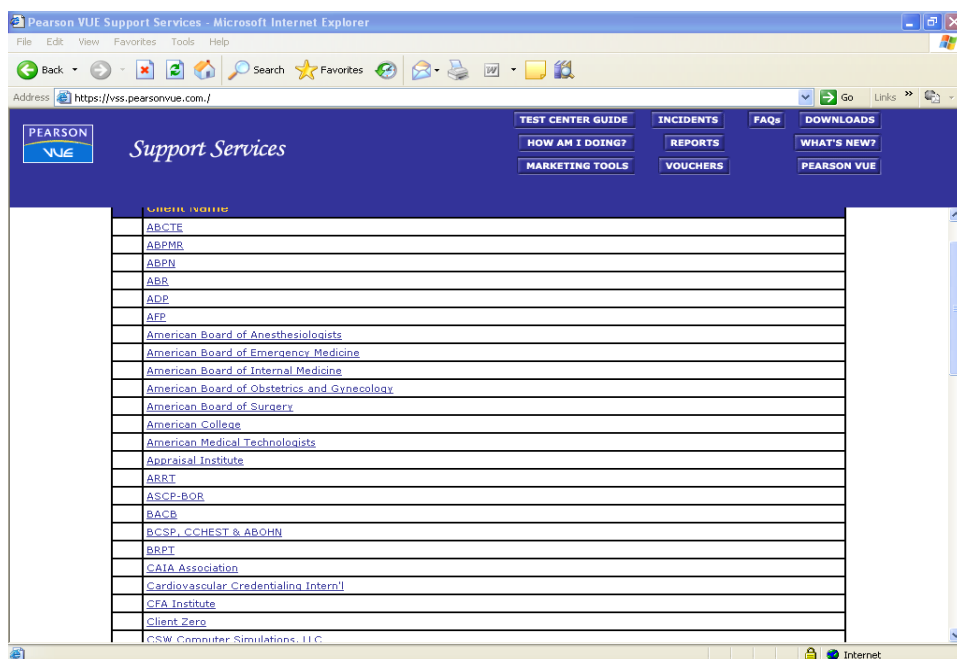
❖ **Exam History** -- Displays information about the tests your ITC delivered during a selected time period, using the sorting option(s) you choose. The report includes candidate names and details

When you choose this report, you need to select the time period you want the report to cover. You can also choose sorting options and can choose to export the results to a file. After making your selections, click the **Run Report** button. An example of an Exam History Report is shown below.
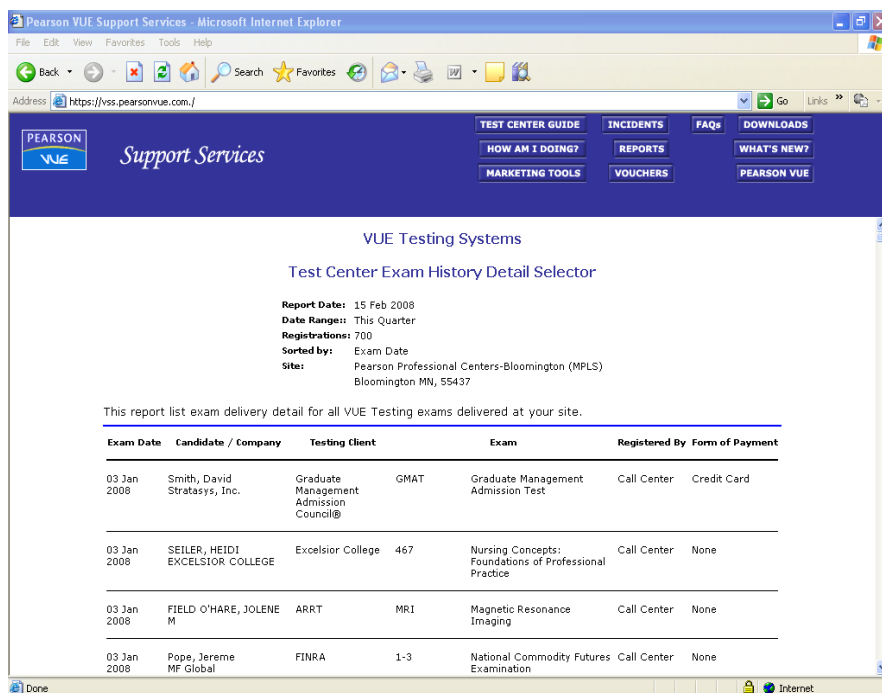
❖ **Exam Historical Summary** -- Allows you to view a summary of the tests scheduled at your ITC during a specified time period. The information includes data on how many tests were delivered and cancelled, how many candidates were no shows and so on.

When you choose this report, you need to select the time period you want the report to cover. After making a selection, click the **Run Report** button. An example of an Exam Historical Summary report is shown below.

The **System Stats** section of the page provides technical information about your ITC, such as the version of the Pearson VUE Testing System software your ITC is running, whether or not your software needs to be updated, the status of your Pearson VUE Application Wrapper, and how many tests are scheduled at your ITC for the current day. You can also click a link to view the RMA connection log report, which allows you to look at your ITCs RMA connection history for a specified period.

❖ **RMA Statistics** -- Contains statistics about your ITCs RMA connections for a selected time period, such as what percentage of connections occurred automatically.

When you choose this report, you need to select the time period you want the report to cover. After making a selection, click the **Run Report** button. An example of an RMA Statistics report is shown below.

❖ **Site Availability Calendar --** Allows you to view a calendar showing the number of tests scheduled at your ITC during a specified time period. It tells you what your available hours are (in parenthesis) and how many tests are scheduled during that time. In addition, the report shows which days have no rules associated with it, which have open hours, which have closed, etc.

Please remember to log off of the VSS web site when you are finished using it.

VSS file download utility

To access the Downloads page (File Download Utility) on the VSS web site, follow the steps below:

1. **On the VSS web site, click the DOWNLOADS button in the navigation panel.**

2. **The File Download Utility home page appears.**

The **File Download Utility** is organised into various categories. These categories contain files that you can either view or download.

3.   **Locate the desired category and click the link.**

4.   **The selected Category opens.**

File Download Utility - category screen elements

1.   File Download Utility relative path

When you open a category, the name of your category on the Downloads home page is displayed below the filters section. Each subfolder is identified by a forward slash.

Example: Downloads Home / ITC Policies and Procedures Guides

2.   Filter the file list

The file download utility allows users to filter the list of files by up to four categories. The person who uploads the file to the site defines which categories are assigned to the file.

There are currently four categories by which you can filter the list:

Client -- Lists all Pearson VUE clients

Document Type -- Identifies the type of document; for example, training document or exam sponsor guide

Language -- Identifies the language in which the document was written

File Format -- Identifies whether the document is in A4. Click the desired filter field drop-down list and select an item in the list. You can only select one item from each drop-down list.

Click the **Filter** button. All files that match the selected filter criteria are displayed.

There is no reset default filter option. You must either navigate away from the page and return to the page or manually reset each filter.

3.   Sort the file list

The default view displays the list sorted by Client and then by Title. You can sort the list in ascending or descending order by any of the column headings.

Sort Ascending

Click the desired column label until an upward pointing triangle ▲ displays to the right of the column label.

Version ▲

Sort Descending

Click the desired column label until a downward pointing triangle ▼ displays to the right of the column label.

Title ▼

4.   Download a file

You can open or download a file from the file download utility page. Different file types have different behaviours when you click the file link.

- A *PDF* opens in a new browser window. If you wish to save a copy of the file you must click the **Save** button in the pdf.

- A *Microsoft Word*, *Excel*, or *PowerPoint* document gives you the option of saving the file or opening it in a browser window.

- A *Zip* file allows you to open or save the file.

- An *executable* file gives you the option of saving or running the executable from the web site. We recommend that you save the file to your hard drive and then run it.

Locate the desired file in the list and click the link.

Click the **Save** button.

Navigate to the desired directory and click **Save**.

Returning to the Downloads Home Page

To return to the Downloads Home page, click the **Downloads** button.

File Download Utility - file location

The table below provides more information on where to find specific files and documents on the File Download Utility.

Files and documents	Category location on VSS Downloads page
VUE Testing Systems Application Files Support Files	Testing Systems Application + Support Files
Installation Guides	Software Installation Instructions
Professional and IT Client Guides, Quick References, and Updates Certification and Employment Testing documents	Professional + IT Exam Sponsor Documentation A-M (includes Certification and Employment Testing)
	Professional + IT Exam Sponsor Documentation N-Z (includes Certification and Employment Testing)
Previous versions of ITC Policies & Procedures Guides *before* Platform Upgrade Previous versions of Startup/Shutdown Checklists *before* Platform Upgrade Previous versions of Check-in/Sign-Out Checklists *before* Platform Upgrade Name and Address Change Forms	Policies and Procedures Guides
Test Centre training modules, tutorials, and other training documents	Training Materials
Test Logs, Waiver Forms and other general materials	Test Centre Materials
Regulatory documentation: Appraisers, Insurance, Real Estate, State Specific, Health Services	Regulatory Exam Sponsor Documentation A-M (includes Regulatory, State Specific and Health Services)
	Regulatory Exam Sponsor Documentation N-Z (includes Regulatory, State Specific and Health Services)
Regulatory ADA/ESL processes and forms	Regulatory ADA + ESL Processes and Forms
Regulatory Operations Manual/Test Centre Forms	Regulatory Policies-Procedures Guides-Forms-Exhibits
Translated test centre documents	Translated Test Center Materials
Note: These materials are for sites on the 1010 VTS version or higher. ITC Policies & Procedures Guide Startup/Shutdown Checklists Check-in/Sign-Out Checklists	Policies and Procedures Guide for Platform Upgrade

Technical problems while accessing the downloads utility

If you experience technical problems while accessing the Downloads Utility, contact VSS for assistance.

Please remember to log off of the VSS web site when you are finished.