

NCCER SPONSOR REPRESENTATIVE RESPONSIBILITY CHECKLIST

Instructions: NCCER recommends for all new Sponsor Representatives to complete this checklist as they review the accompanying [NCCER Sponsor Representative Responsibilities](#) document.

Getting Started

- 1. Add Curriculum in the NCCER Registry System
- 2. Order Curriculum at the Pearson Bookstore
- 3. Order Instructor Training Materials
- 4. Conduct Instructor Training
- 5. Submit Registration of Curriculum Certifications
- 6. Conduct Testing and Submit Performance Profile Dates
- 7. Manage Users and Billing in the NCCER Testing System
- 8. Comply with Recordkeeping Policies
- 9. Comply with all Additional Policies as Outlined in the Guidelines
- 10. Review Registry System Submissions
- 11. Evaluate Training Locations and Certified Personnel
- 12. Register Qualified Individuals for Master Trainer Class
- 13. Verify Training Credentials and Module Completions
- 14. Maintain Registry System Lists
- 15. Complete Annual Accreditation Requirements
- 16. Review NCCER Support Knowledge Base

NCCER Sponsor Representative Responsibilities

This list serves as a reference material for individuals new to the Sponsor Representative role. After reviewing this resource, you should have a better understanding of your responsibilities as a Sponsor Representative.



1. Add Curriculum in the NCCER Registry System

As the Sponsor Representative, you are responsible for adding titles to maintain your organization's list of curricula in the NCCER Registry System. Updating this list allows you to control the curriculum titles that your certified instructors can teach.

- a. Please note that your organization will not be able to submit training for curriculum titles that have not been added to your organization. You will need to ensure you have added the appropriate curriculum titles before training.

- i. **How-To Guide:** [How to Add Curriculum Titles to your Organizations](#)



2. Order Curriculum at the Pearson Bookstore

Your next responsibility is to start ordering curriculum (textbooks) for each trainee to use during the training session. Please note that you will not be purchasing craft training curriculum from NCCER; rather, you will be buying these materials directly from Pearson. Please access the current Curriculum Catalog and list of Pearson Executive Directors who service your region at the links below.

- i. **NCCER Curriculum Catalog:** [NCCER Pearson Bookstore](#)

- ii. **Pearson Contact Information:** [Pearson Executive Directors](#)



3. Order Instructor Training Materials

You must maintain a supply of training materials for the Master Trainers at your organization who will conduct training to certify Craft Instructors, Curriculum Performance Evaluators, and Module Test Proctors. Please note that Pearson does not fulfill orders for instructor training materials. Orders should be placed at the NCCER website using the link below.

- a. Your responsibility to maintain a supply of materials includes ordering for the training you will personally conduct, as well as delegating the ordering responsibility to other members of staff under your sponsorship.

- i. **Order Materials Here:** <https://shop.nccer.org/>



4. Conduct Instructor Training

You and/or your Master Trainers are responsible for conducting training to certify Craft Instructors, Performance Evaluators, and Module Test Proctors. You will first order

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training materials from NCCER before scheduling any Instructor Certification Training Program (ICTP) sessions.

- a. Your instructor training must also cover how to use the Registry System and NCCER Testing System (if applicable). NCCER recommends that you and your personnel register and attend the webinars below.
 - i. **Registry System Training Webinar:** [Register Here to Attend](#)
 - ii. **Testing System Training Webinar:** [Register Here to Attend](#)
- b. Your training must also reinforce that instructors and support personnel are required to accurately enter trainee names when adding a new Test-Taker in the Testing System. Careful attention to typing and spelling will ensure timely printing of credentials. Training organizations will incur a \$20 fee for each set of credentials reprinted due to misspelling.
 - i. **How-To Guide:** [How to Order Credential Reprints](#)



5. Submit Registration of Curriculum Certifications

You are responsible for submitting instructor training in the Registry System. You should confirm that all records have been securely stored **BEFORE** submitting any training or certifications (see [Comply with Record Keeping Policies](#)).

- a. Submitting ICTP training via the Registration of Curriculum Certifications. You will need to ensure you're logged in as the ATS Sponsor Representative when completing your own Registration of Curriculum Certifications. Submitting under any other role will require you to review your own submission.
 - i. **How-To Guide:** [How to Certify a Craft Instructor, Performance Evaluator, or Module Test Proctor](#)



6. Conduct Testing and Submit Performance Profile Dates

All module exams must be proctored in the Testing System and will automatically submit to the Registry System once passed by the trainee. Completed Performance Profile dates must also be submitted in the Testing System for the trainee to earn credit.

- i. **Testing System Videos:** <https://bit.ly/Testing-System-Training-Videos>



7. Manage Users and Billing in the NCCER Testing System

You are responsible for managing users in the Testing System by assigning them the basic, manage tests, or can proctor responsibilities.

- a. Managing access involves assigning permissions for users to perform group management and pull score reports (**basic**), create test assignments and submit performance profiles (**manage tests**), and proctor module tests (**can proctor**).
 - i. **How-To Guide:** [How to Assign and Manage User Permissions](#)

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- b. The billing for all testing locations is defaulted to bill directly to the testing location. If the Sponsor Representative would like to change this setting, they will have to contact NCCER support at 1-888-622-3720 or support@nccer.org.
- c. To fully prepare yourself and your team to use the Testing System, NCCER offers a free recorded webinar, a free live webinar, and a series of training videos on each task and process you'll encounter in the system. The live webinar provides a detailed walk-through of how to use the NCCER Testing System, as well as a Q&A session to help answer all your questions. You are highly advised to attend one of these.
 - i. **Free Recorded Webinar:** <https://youtu.be/Yuj1WpYp-tM>
 - ii. **Free Live Webinar:** [Register for NCCER Testing System Webinar](#)
 - iii. **Testing System Videos:** <https://bit.ly/Testing-System-Training-Videos>



8. Comply with Record Keeping Policies

You are required to ensure your training program and certified personnel comply with NCCER's record keeping policy.

- a. Ensuring that every member of ICTP certified personnel at your organization, regardless of whether you had originally certified them, has a file containing their documentation qualifying their journey-level experience in each curriculum restriction in their ICTP certification, their completed Responsibilities & Liabilities form, completed Registration & Release form, completed ICTP module exams, and completed evaluation forms. A random selection of these items will be requested during the on-site audit, so be sure to have these in a secure and accessible location.
 - i. **ATS Guidelines:** [Accredited Training Sponsor Personnel](#)
 - ii. **ATS Guidelines:** [Eligibility Requirements](#)
 - iii. **ATS Guidelines:** [Eligibility Requirements](#)
- b. Ensuring that all graded performance profile sheets and Registration & Release forms are kept on file for the trainees for any module exam (except pipeline Covered Task (CT) exams). A random selection of these items will be requested during the on-site audit, so be sure to have these in a secure and accessible location.
 - i. **ATS Guidelines:** [Registration and Release](#)
 - ii. **ATS Guidelines:** [Performance Profiles](#)
- c. For completed pipeline CT testing, you must ensure the completed performance profile sheets and Registration & Release forms are kept on file. A random selection of these items will be requested during the on-site audit, so be sure to have these in a secure and accessible location.
- d. Module exams can only be delivered via the NCCER Testing System. Paper tests can no longer be used for testing credit. As a result, NCCER no longer requires

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organizations to maintain records of completed paper tests, but you must still maintain the completed Performance Profile sheets and Registration & Release forms on file, as these may be requested during the on-site audit.



9. Comply with all Additional Policies as Outlined in the Guidelines

You are responsible for understanding and adhering to all policies as outlined in the NCCER Accreditation Guidelines. Listed below are a few additional policies that have not been completely outlined in this document.

- a. Module test room set up
- b. Performance profile area set up OR indicate if performance is conducted on the jobsite
- c. Retest policy for module exams and performance profiles
- d. Safety policy for performance profile testing
- e. Policy for maintaining security of NCCER curriculum and security and storage of all testing documentation
- f. Policy for handling cheating
- g. Appeals and grievances policy and procedure
- h. Policy for ensuring certified personnel maintain certifications.
- i. Policy for notifying your network and personnel about NCCER policy/procedure revisions
- j. Policy for relaying or communicating your organization's training program contact information (i.e., Sponsor Representative, Instructor, etc.) to personnel and trainees.
- k. Policy for removal/replacement of Sponsor Representative.
- l. Procedure for returning training records to Sponsor Representative or Site Representative following:
 - i. Departure of Instructor, Curriculum Performance Evaluator, Module Test Proctor, etc.
 - ii. Closure of training program/location
 - iii. Transfer of TU/ATEF to a new ATS



10. Review Registry System Submissions

You are also responsible for reviewing several areas in the NCCER Registry System.

- a. Reviewing/submitting applications for new locations that register in the Registry System and request association with your organization. Please note that training locations must be registered and approved in the Registry System before they will populate in the Testing System.
 - iv. **How-To Guide:** [How to Register Training Locations](#)
 - v. **How-To Guide:** [How to Approve TU/ATEF Registrations](#)

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- b. Reviewing association requests for any certified training personnel in the Registry System. You will need to ensure your certified personnel are associated with the appropriate training locations in the Registry System before they start conducting any training responsibilities.
 - i. **How-To Guide:** [How to Approve User Role Requests](#)
- c. Reviewing the Registration of Curriculum Certifications for other Master Trainers at your organization who submit ICTP training. This will not include your own submissions if you perform this process as the ATS Sponsor Representative.
 - i. **How-To Guide:** [How to Approve an ICTP Certification Form](#)
 - i. **How-To Guide:** [How to Approve Module Submissions](#)
- d. Reviewing the Master Trainer class registrations. Approve only if the registrant meets the Master Trainer class qualifications.
 - i. **How-To Guide:** [How to Approve Class Registrations](#)



11. Evaluate Training Locations and Certified Personnel

You are responsible for conducting on-site audits of your training locations and evaluate your certified training personnel based on a specific frequency. You are also responsible for ensuring trainees complete Craft Instructor evaluations based on a specific frequency.

- a. Conducting site audits of all TU, and ATEF locations once within the first year of accreditation, and then once every three years thereafter. You must keep a written document of the audit with the date of completion clearly displayed. A random selection of these items will be requested during the on-site audit, so be sure to have these in a secure and accessible location.
 - i. **ATS Guidelines:** [Training Locations](#)
 - ii. **How-To Guide:** [TU/ATEF Audit Summary](#) (Checklist)
- b. Conducting Craft Instructor, Module Test Proctor and Curriculum Performance Evaluator evaluations once within the first year of certification, and then once every three years thereafter. A random selection of these items will be requested during the on-site audit, so be sure to have these in a secure and accessible location.
 - i. **ATS Guidelines:** [Instructor Evaluations](#)
 - ii. **ATS Guidelines:** [Performance Evaluator Evaluations](#)
 - iii. **How-To Guide:** [Instructor Evaluation Form](#)
 - iv. **How-To Guide:** [Curriculum Performance Evaluator Evaluation Form](#)
- c. Administering evaluation forms to trainees for them to evaluate Craft Instructors. This must be conducted for each Craft Instructor once with the first year of accreditation, and then once every three years thereafter. A random selection of these items will be requested during the on-site audit, so be sure to have these in a secure and accessible location.

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- i. **How-To Guide:** [Student's Instructor Evaluation Form](#)



12. Register Qualified Individuals for Master Trainer Class

- a. Individuals attending the Master Trainer class will commonly complete their own class registration, but the Sponsor Representative does have access to complete this process for them. The only caveat to this process is that whoever completes the class registration will be responsible for paying the class fee. If the Sponsor Representative plans to pay for the attendee's registration using their own payment method, then they should complete the class registration for the attendee.
 - i. **How-To Guide:** [How to Register and Pay for Master Trainer Class](#)



13. Verify Training Credentials and Module Completions

Using Online Verification, Bulk Verification, and the Quick Check feature to verify training credentials and instructor certifications in the Registry System.

- i. **How-To Guide:** [How to View My Credentials](#) (Online Verification)
- ii. **How-To Guide:** [How to Perform a Quick Check](#)



14. Maintain Registry System Lists

You are responsible for maintaining your lists of associated organizations and associated users in the NCCER Registry System.

- a. Maintaining your list of associated organizations (TU, ATEF) in the Registry System also includes maintaining the name, address, credential shipping option, and representative for each location.
 - i. **How-To Guide:** [How to Clean Up Associated Organizations List](#)
 - ii. **How-To Guide:** [How to Change a Facility Representative](#)
 - iii. **How-To Guide:** [How to Change Accredited Organization Address](#)
 - iv. **How-To Guide:** [Differences Between TU/ATEF Locations](#)
- b. Maintaining your list of associated users in the Registry System includes adding each member of certified training personnel at your organization. You are also responsible for removing these users and deactivating their role in the Registry System when they are no longer associated with your organization.
 - i. **How-To Guide:** [How to Clean Up the Personnel List](#)
 - ii. **How-To Guide:** [How to Assign User Roles](#)
- c. Maintaining certifications for your certified training personnel includes reminding your associated personnel about upcoming expirations and their need to maintain their certification before expiring. NCCER only contacts the Sponsor Representative and Primary Administrator to notify these individuals about their expiring Master Trainer and Assessment Administrator certifications. *It is your responsibility to ensure your certified personnel remain current and do not expire.*

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i. **ATS Guidelines:** Accredited Training Sponsor Personnel



15. **Complete Annual Accreditation Requirements**

a. The Sponsor Representative is responsible for completing the annual accreditation survey. NCCER will communicate a deadline for all organizations required to complete the survey. Failure to submit the annual survey will result in suspension.

i. **ATS Guidelines:** Accredited Training Sponsor Responsibilities

b. The Sponsor Representative must submit payment of the annual maintenance fee. NCCER will communicate a deadline for all organizations required to pay the annual maintenance fee within the next calendar year after the initial audit has been conducted. Failure to submit payment will result in suspension.

i. **ATS Guidelines:** Accredited Training Sponsor Responsibilities



16. **Review NCCER Support Knowledge Base**

Your final responsibility is to review the NCCER Support Knowledge Base. This part of NCCER's customer portal gives you the ability to search a vast collection of support articles and how-to guides, many of which have been linked in this document. The search feature allows you to find information by entering keywords and choosing suggested articles, or by entering as much information as possible to query the collection for all common word matches.

a. NCCER highly recommends searching the knowledge base as your first step to answering questions and obtaining more information.

i. **NCCER Support Knowledge Base:** <https://support.nccer.org/>



Additional Resources

Audit Preparedness Articles

<https://nccer.freshdesk.com/a/solutions/folders/13000001973>

NCCER Accreditation Guidelines

https://www.nccer.org/docs/default-source/manuals/nccer_accreditation_guidelinesb527712ac95a6cd4834aff0000731bb1.pdf