

Digital Certificate Platform Reference Guide

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Welcome

The National Safety Council First Aid Practice Area provides participant course completion certificates digitally through a web-based platform. This platform provides NSC Chapters, Training Centers, Instructors, and students with access to Digital Course Certificates. Every purchase of First Aid participant workbooks and e-participant workbooks is paired with an equal number of digital certificates.

It enables users to:

- Distribute student course certificates easily via email
- · Generate batch certificates by uploading class rosters
- · Email notification to workplaces as required for employee certification reporting
- Send Certificates from Chapter or Training Centers to Instructors when participant workbooks are purchased
- Search for student participant certificates

This guide is designed to provide directions for using the NSC Digital Certificate Platform to award course completion certificates to participants.

Logging in

To login, go to https://www.nsc.org/first-aid-control-panel.

In order to login, you must have an NSC account:

- Returning users, enter your email address and password
- New users, click on "Create an Account." Use Chapter or Training Center Number for Member/Account ID when setting up a new account.

NOTE: If the new user is a current NSC Instructor, the system will automatically provide Instructor Access. If the new user is an administrator, please email: <u>FACerts@nsc.org</u> to set up administrator access. Include their name, email, and chapter or training center information in your message.

Weld	come to NSC
Click the li	nk below to log in to your NSC account.
Login	
New to Nati	onal Safety Council or don't have an account?
Create an acco	

Upon log in, users will be directed to the Digital Certificate Control Panel that matches their role, either the Instructor Control Panel or an Administrator Control Panel (Chapter or Training Center).

ORIGIN / / DIGITAL CERTIFICATE PLATFORM - CONTROL PANEL

Instructor Control Panel

There are three options on the **Instructor Control Panel**.

- Upload Roster Access the class roster file, enter your class roster details and upload to generate digital certificates
- Search Students Search for certificates issued to students and edit student name information
- Find Digital Certificates Search for a student's certificate using their email address or the certificate security control number

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Instructors need Digital Certificates in their accounts to upload rosters. Certificates can be placed in the Instructor account by the Chapter or the Training Center. Instructors for independent training centers will have an option to purchase workbooks from nsc.org/shop. <u>See Certificate Distribution to learn more.</u>

Digital Certificate Platform	
Control Panel	Instructor
Control Panel Upload Roster Search Students Find Digital Certificates	🖹 Quick Reference Guide

The dark blue Menu bar across the top of the Control Panel screen can be used for navigation, too.

- Control Panel Returns to main control panel view
- Upload Roster Upload on behalf of Instructors
- Search Students Search students within the Chapter or Training Center records
- Find Digital Certificates Link to <u>nsc.org/FAverify</u>
- Quick Reference Guide Digital copy of this guide

Upload Roster Screen Tour

At the end of the instructor-led First Aid course, Instructors will upload their student roster to provide certificates for participants who have successfully completed the course.

- Use the Download this Roster Template to access the template for uploading rosters, Roster Template.csv.
- 2. **Certificate Title** field. Dropdown options will match the courses the Instructor is certified to teach.
- 3. **Optional Info** field. Select this option for students who need Coast Guard designation on their certificates.
- 4. **Choose File** allows user to pull in the .csv file.



- 5. Upload combines all steps to build the file for review.
- 6. **Current Digital Certificates** shows a list of the certificates the Instructor has available to send to course participants.

NOTE: Chapter Instructors will work directly with their chapter or training center administrator to obtain certificates.

7. The **Purchase** button is only visible to Independent Instructors who can access nsc.org/shop to purchase workbooks. Purchasing workbooks adds certificates to the **Current Digital Certificates** section. <u>See the Purchases for Independent Instructors to learn more.</u>

Choosing the Correct Certificate Title

The certificate title dropdown area will be populated based on the participant or e-participant workbooks purchased. Choose Certificate Title that matches the curriculum taught. In the example below the workbooks purchased are **NSC First Aid, CPR & AED**, which contain course information that allows for a variety of certificates based on which course components are taught.

Example:

Participant or e-Participant Workbook Name	Certificate Title Options	Course Taught
NSC First Aid, CPR & AED Participant/e-Participant Workbook	First Aid	First Aid only
NSC First Aid, CPR & AED Participant/e-Participant Workbook	First Aid, Adult CPR & AED	Full adult curriculum
NSC First Aid, CPR & AED Participant/e-Participant Workbook	First Aid, Adult, Child and Infant CPR & AED	Full curriculum including child and infant CPR & AED
NSC First Aid, CPR & AED Participant/e-Participant Workbook	CPR & AED	CPR & AED only

Completing Participant Rosters

- 1. Using Roster_Template.csv, input:
 - the course participants' first and last names
 - the course date
 - the participants' emails if participant email is not available, it is possible to use the Instructor email or a company contact's email
 - the length of course

NOTE: The CCEmail and Company Name columns are optional. Use the CCEmail column when the participants' workplace has requested a copy of the certificate. This will send an email to the company contact providing a link to the participant certificates.

	А	В	С	D	E	F	G	H 🔺
1	FirstName	LastName	CourseDate	StudentEmail	TotalHoursComplete	CCEmail	CompanyName	
2	required	required	required	required	required	optional	optional	
3	Sam	Safety	8/1/2023	SamSafety@KeepSafe.org	8	HROffice@KeepSafe.org	Keep Safe, Inc.	
4	Shawna	Safer	8/1/2023	ssafer@gmail.com	8			
5	Sheila	Safest	8/1/2023	S.Safest@hotmail.com	8	Manager@sweetsafety.com	Sweet Safety, Co.	
6								
-								

2. Save the file in a readily accessible folder.

NOTE: The file must remain a .csv file, but the file name can be changed. Example: FACPRAED5123.csv

Uploading Participant Rosters

On the **Upload Roster page**, complete the following fields and tasks:

- 1. Certificate Title
- 2. Optional Info use if creating certificates for those needing *Coast Guard* designation
- Click on Choose File this will open a file search allowing selection of the roster file
- 4. Click on Upload



Coast Guard Designation

If you have course participants from the US Coast Guard, they MUST have the Coast Guard designation on their certificate. There are three options for US Coast Guard members:

- USCG First Aid Approval for First Aid Only participants
- USCF CPR Approval for CPR/AED participants
- USCG First Aid and CPR Approval for participants who complete the First Aid, CPR & AED course



Sending Participant Certificates

The platform will display a copy of the roster for approval.

- 1. Verify correct names, emails, and other input.
- 2. If edits are needed, click on (2) Discard Upload to cancel the upload.
- 3. Reopen the file from where it was saved and correct the file.
- 4. When the data is correct, follow the upload roster steps then click on (3) Save and Send Emails.

#	First	Last	Company	Student Email	Hours	Course Date	Expiration Date	Instructor	Optional Info	
1	Sam	Safety	"Keep Safe	SamSafety@KeepSafe.org	8	08/01/23	08/31/25	Scott Hunt	NATSAF202/NATSAF133	HR
2	Shawna	Safer		ssafer@gmail.com	8	08/01/23	08/31/25	Scott Hunt	NATSAF202/NATSAF133	
3	Sheila	Safest	"Sweet Safety	S.Safest@hotmail.com	8	08/01/23	08/31/25	Scott Hunt	NATSAF202/NATSAF133	Mai

Student Certificate Access

When the **Save and Send Emails** has been selected, the platform will send each student an email:

Subject line: National Safety Council Course Successfully Completed

From: Customerservice@nsc.org

It will contain two links:

- Student Certificate Links directly to NSC Student Certificate Dashboard. The student will not need to log in.
- Verify Certificate Links to nsc.org/FAverify, a site where anyone can verify a First Aid certificate with the recipient's email or the security control number from the course certificate.

NOTE: nsc.org/FAverify will only return results for students who have received digital certificates. It does not contain data for those who received paper certificates.

National Safety Council Course Successfully & C Completed Index *

customerservice@nsc.org to samsafety@company.org •

::nsc

Jun 22, 2023, 12:39 PM

*

:

National Safety Council Digital Certificate



Sam Safety, Congratulations on successfully completing your NSC course.

Your certificate can now be accessed online at the link below.

Student Certificate

Your digital certificate can also be verified online at:



Student Certificate Dashboard

The Student Certificate Dashboard will reflect the data input during the **Upload Roster** process. Clicking on the **Full Page PDF** or the **Wallet PDF** will provide a file that can be saved, printed, or shared via email.

Student Certificate				SECURITY CONTI 128812492/
First Name	Instructor Name	View Certificate(s)	Contificant	lan Cand
am	Adam Joyner	Active Exp. 08/31/2025	Certificat	ion Cara
ast Name	Course	First Aid, Adult CPR & AED	Sam S	afety
Safety	NSC First Aid CPR & AED e-Participant Workbook Spa	🔓 Full Page PDF 📑 Wallet PDF	has successfully comp and skills evaluation	oleted the cognitive
mail address				s is: the following.
otwilegar@gmail.com	Training Center Name			
Control No.	Rhino Manufacturing		First Ald, Adul	t CPR & AED
			COMPLETION DATE	INSTRUCTOR
28812492A991E			8/3/2023	Adam Joyner (#01018053
			EXPIRATION DATE	TRAINING CENTER
			8/31/2025	Rhino Manufacturing
			0,01,1010	
				TRAINING CENTER ID
				2454717
			This course is equivaler	nt to AHA Guidelines
			This credential can be veri	fied at nsc.org/FAverify

Students who have received digital certificates can access their certificates at any time using their email. The certificate pdf can also be saved as a file.

*** No more replacing lost certificates. ***

Instructors can direct their students to <u>nsc.org/FAverify</u> to input their email address to access the Student Certificate Dashboard and download their certificate(s).

Purchases for Independent Instructors

Instructors who are not associated with a Chapter or Chapter sub-agency Training Center are considered Independent Instructors or Independent Training Centers. For these individuals, a **Purchase** button has been added to the **Upload Roster** screen. This button redirects the Instructor to the NSC.org/shop.

In the shop, participant workbooks and e-participant workbooks can be purchased. The workbooks will be shipped to the Independent Instructor and the Digital Certificate Platform will have an equal number of Digital Certificates available for distribution in the Instructor's **Upload Roster** area of the platform.

urrent Digital Certif	icates	
ou have 47 Certific	ate(s) available.	
Product	Certificate Balance	SKU
		700050005

Search Student Certificates and Editing Student Name

Use this tool to search for students who have worked with you to obtain certificates. Student searches can be performed with any of the following data, it is not necessary to complete all fields:

/ ... / DIGITAL CERTIFICATE PLATFORM - SEARCH STUDENTS

- Student email this will return a record for each student using the email
- Last name this will return all students with a specific last name
- Security Control each certificate will have a unique alphanumeric ID called a Security Control number searching by this number will return the student information mapped to that Security Control number
- **Class Title** this will return all student names from the class selected
- Course date this will return all students names from courses uploaded on a specific date
- Expiration date this will return all students whose certification is set to expire on a specific date
- **Open Search** with no fields selected, click **Search Students** to return a result of all digital certificate activity. This can be helpful when reviewing training activity over time.

Note: Search Student results are limited to students for whom the Instructor, Training Center, or Chapter has issued certificates. *The results will not pull up data entered by other agencies.*

Editing Student Name

Editing the student certificate is limited to updating the student name.

- 1. Choose Search Students
- 2. Enter search criteria (course date in example)
- 3. Click on Student Email in column one, to open **Edit** screen.
- 4. To view the **Student Certificate Dashboard** and access individual student's certificates, click on the **Security Control Number.**



Control Panel	Upload Roster	Search Students	Find Digital Certificates	Quick Reference Guide
Student Email		First	Name	ast Name
phologar@gmail.	com	Sar	hoen	Safety
Security Control No				
2934/0e66006	1000			

- 5. Edit name
- 6. Select Update Student

NOTE: Updating the student name will send an email to the student letting them know their name has been updated. NSC also receives notification of the edit.

Control Panel Upload Roste	er Search Stude	ents Find Digital Certificates	🚺 Qui	ck Reference Guide
udent Email		Last Name	Security Control	
urse Title		Course Date	Exp. Date	
Select	~	mm/dd/yyyy	mm/dd/yyyy	

Viewing Student Certificates

Student Certificates can be accessed in two ways.

- 1. From Control Panel, click Find Digital Certificates:
 - a. Enter Student Email
 - b. Click on Find Certificate
 - c. Search results will appear. Click on View Card.
 - d. This will open the <u>Student</u> <u>Certificate Dashboard.</u>



- 2. From Control Panel, click Search Students:
 - a. Choose a search option (Student Email is selected in this example).
 - b. Click Search Students.
 - c. Click on the **Security Control No.**
 - d. This will open the <u>Student Certificate</u> <u>Dashboard.</u>

Student Email (click to edit)	Course Title	First Name	Last Name	Instructor Email	Course Date	Expiration Date	Security Control No.
amSafety@KeepSafe.org	NSC Advanced FA & BLS E-Participant Textbook	Sam	Safety	htnsc1211+shunt@gmail.com	08/01/23	08/31/25	1297321818a18a

Chapter and Training Center Administrator Control Panel View

NSC Chapter and NSC Training Center staff with *Administrative Access** will have similar control panel views. See the <u>User Roles and Business Rules</u> chart for more detail.

- Upload Roster Access the class roster file, enter class roster details on behalf of Instructor and upload to generate digital certificates
- Search Students Search for certificates issued to students and edit student information
- Certificate Distribution Distribution certificate licenses to training centers and Instructors (Chapter View) or to Instructors (Training Center Admin View)
- Find Digital Certificates Search for a student's certificate using their email address or the certificate security number – links to <u>nsc.org/FAverify</u>

trol Panel Upload Roster Search St	udents Certificate Distribution Find Digital Certi	G Quick Reference Guide
Upload Roster	Search Students	Certificate Distribution
ter your class roster and upload to generate digital certificates	Search for certificates issued to students and edit student information	Distribute certificate licenses to training centers and instructors
\frown		
(Q)		
nd Dialtal Certificates		

*Please email: <u>FACerts@nsc.org</u> to set up administrator access. Include the administrator's name, email, and chapter or training center name and account number in your message.

The dark blue Menu bar across the top of the Control Panel screen can be used for navigation, too.

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--	--------------	---	--	---	--

- Control Panel Returns to main control panel view
- Upload Roster Upload on behalf of Instructors
- Search Students Search students within the Chapter or Training Center records
- Certificate Distribution Distribute certificates for Instructor use
- Find Digital Certificates Link to <u>nsc.org/FAverify</u>
- Quick Reference Guide Digital copy of this guide

Certificate Distribution

When NSC First Aid participant or e-participant workbooks are purchased, the Chapter or Training Center will receive digital certificates to distribute to Instructors. Those certificates are managed through the **Certificate Distribution** button.

Chapter Admins will be able to distribute digital certificates either to Instructors or Training Centers.

NOTE: While it is possible to have participant workbooks shipped to a different address than the primary account address when ordering, the digital certificates will appear in the **Account Administrator Control Panel**. This will allow the Chapter or Training Center to control who receives the certificates.



Distribution from Chapter to Training Center

- 1. Click Training Center from Certificate Distribution screen.
- 2. Input:
 - **Training Center ID** (This can be found in Salesforce)
 - The quantity of Certificates to distribute
 - **Product Title** Available products will be listed below the input fields
- 3. Select Distribute Certificates.

The Training Center and the Chapter Admin will receive an email notification that certificates have been added to the Training Center account.

Digital Certificate Platform Certificate Distribution > Training Center Quick Reference Training Center ID Quantity Product Title Digital Certificate Allo 0 Descriptio Distribute Certifica Total to Distribute 1080 Currently Allocated 54 Invoice Amount Remain to Product Name Qty. Distributed Distribute NSC First Aid Student Workbook Pkg 30 11 19 odborne & Airborne Pat 43 1007 Student Workbo Product Name Amount NSC First Aid Student Workbook Pkg 30 NSC Bloodborne & Airborne Pathogens Student Workbook Pk 1050

Distribution from Chapter to Instructor

- 1. Click Instructor from Certificate Distribution screen.
- 2. Input:
 - a. Instructor Email
 - b. Quantity of Certificates
 - c. Product Title
- 3. Select Distribute Certificates.

The Instructor and the Chapter Admin will receive an email notification that certificates have been added to the Instructor account.



Distribution from Training Center to Instructor

- 1. Click Certificate Distribution icon.
- 2. Input:
 - a. Instructor Email
 - b. Quantity of Certificates
 - c. Product Title
- 3. Select Distribute Certificates.

The Instructor and the Training Center Admin will receive an email notification that certificates have been added to the Instructor account.

Digital Certificate Platform Certificate Distribution > Instructor						
Control Panel Upload Roster Sear	ch Students	Certificate Distribution	Find Digital C	ertificates	Duick	Reference Guide
Instructor Email Quantity htnsc1211+lcox@gmail.com 7	Produc	t Title First Aid CPR & AED e-P	'articipant V 🗸 🗸	Dig	ital Certificate Allocati	on
Distribute Certificates					Description	Amount
				Т	otal to Distribute:	85
Product Name	Invoice Qty.	Amount Distributed	Remain to Distribute	с	urrently Allocated:	18
NSC Pediatric First Aid CPR & AED e- Participant Workbook	35	18	17			
Product	Name		Amount			
NSC First Aid CPR & AED e-Participant Workbook			50			
NSC Pediatric First Aid CPR & AED Particip	ant Workbook		35			

Uploading Rosters on behalf of an Instructor

After certificates have been distributed to Instructors. Chapter and Training Center Admins can upload rosters on behalf of Instructors associated with their account.

- 1. Click Upload Roster.
- 2. Select Instructor from dropdown list.



- Once Instructor is selected the Current Digital Certificates table will populate with Course Title(s) and number of available certificates.
- 4. Follow steps in <u>Upload Roster</u> section to send participants their digital certificates.

Control Panel	Upload Roster	Search Studenta	Certificate Distribution	Find Digital Certifi	icates	B Quick	Reference Guide
wnload this Ro iew any errors.	oster Template to Once approved, stu	use in the upload se dents will receive th	ction below. Once uploader eir Digital Certificates via e	d, you will mail.	Current Digi	tal Certificate	8
tructor*			Roster File* Choose File No file chosen		Choose an I	nstructor	
dam Joyner		~				Certificate	
rtificate Title*			Upload		Product	Balance	SKU
Select one		~			First Aid	5	792000020
tional Info					Pediatric	7	792600025
		~			First Aid,		
					CPR &		

Digital Certificate Platform User Roles

There are three User Roles for the Digital Certificate Platform. All Instructors are granted Instructor access. Chapter and Training Center Admin access is granted by NSC. Email <u>FACerts@nsc.org</u> to have access changed.

Function in Digital Certificate Platform	Instructor	Training Center Admin	Chapter Admin
Upload Roster	Able to upload rosters only for classes taught	Able to upload on behalf of Instructors within Training Center	Able to upload on behalf of Instructors within Chapter
Current Digital Certificates	Able to view Certificates purchased by Instructor, or distributed to Instructor by Training Center or Assigned Chapter NOTE: Chapter Instructors must purchase from Chapter	Able to view Certificates purchased by Training Center or distributed to Training Center by Assigned Chapter	Able to view Certificates purchased by Chapter
Search by Student Email Search by Last Name Search by Security Control	Returns results if email, last name, or security control match a student taught by Instructor	Returns results if email, last name, or security control match a student taught by any of the Training Center's Instructors	Returns results if email, last name, or security control match a student taught by any of the Chapter's Instructors, or any of the Chapter's Sub Agencies' Instructors
Search by Course Title	Drop down list of all courses taught by Instructor	Drop down list of all courses taught by Training Center's Instructors	Drop down list of all courses taught by Chapter's Instructors, or Chapter's Sub Agency Instructors
Search by Course Date	Will return results for any courses taught by the Instructor on the selected date	Will return results for any courses taught by any of the Training Center's Instructors on the selected date	Will return results for any courses taught by any of the Chapter's Instructors, or any of the Chapter's Sub Agencies' Instructors on the selected date
Search by Exp. Date	Will return results for any student who has an expiration date matching the selected date who was taught by the Instructor	Will return results for any student who has an expiration date matching the selected date who was taught by any of the Training Center's Instructors	Will return results for any student who has an expiration date matching the selected date who was taught by any of the Chapter's Instructors, or by any of the Chapter's Sub Agencies' Instructors
Certificate Distribution	No	Able to distribute Certificates to any of the Training Center's Instructors	Able to distribute Certificates to any of the Chapter's Instructors, or any of the Chapter's Sub Agencies' instructors, or to a Training Center Account

Troubleshooting Digital Certificate Platform Messages

Digital Certificate Platform Messages				
Message	Recommended Action			
Please choose a course title	In Roster Upload , select certificate title from the dropdown box.			
The provided file contained errors. Please see detail: <error message="">. Use "Discard Upload" button to start over.</error>	In Roster Upload , an error was discovered in the way the information was added to the .csv roster file. Use the Discard Upload button to start over. Check the .csv file for omitted or incorrect information.			
Only CSV format is accepted. Please save Roster Template as a CSV file.	In Roster Upload , the Digital Certificate Platform does not accept Excel or Google Sheets files. Save the roster as a .csv file.			
The file uploaded was not valid. Please ensure all required columns are filled out.	In Upload Roster , data was missing. Required fields are: participant first and last name; course date; participant email; length of course.			
The file upload was missing information. Please ensure all required columns are filled out: First Name, Last Name, Course Date, Student Email, and Course Length.	In Upload Roster , data was missing. Required fields are: participant first and last name; course date; participant email; length of course.			
An unknown error occurred. Please try uploading again. If error persists, contact Customer Service.	In Upload Roster , a time out or other error occurred. Try a screen refresh and walk through the steps again.			
Please attach roster csv file.	In Upload Roster , the .csv file was not attached. Click the Choose File button and search for the .csv file.			
The file uploaded did not contain any data. Please ensure all required columns are filled out.	In Upload Roster , confirm that the .csv file is being uploaded and that all required fields are filled.			
The roster upload included more participants than available certificates.	In the Upload Roster function, the Instructor must have at least as many certificates as course participants. The chapter or Training Center can distribute more certificates if available. Independent Instructors can purchase more certificates. Instructors associated with a Chapter or Training Center will need to have certificates provided to them.			
Please enter an email address or security code	In Find Certificate , confirm that an email address or security code has been selected.			
There was an error with the link provided. Please use student email field.	In Find Certificate , the Security Control number was not correct. Search by the student email.			
Student record could not be retrieved.	In Search Student or Find Certificate , confirm that the student completed the course after the Digital Certificate Platform was in place. Students who received paper course certificates will not be found in the First Aid look up tool.			
No results returned, try alternate search field.	In Search Student , try leaving all fields empty. This will return all available data from the user.			
Need assistance? Contact NSC Customer Service 1 (800) 621-7615 or ema	il FACerts@psc.org © 2023 National Safety Council			

Student record could not be retrieved. Try alternate search field.	In Search Student , try leaving all the fields empty. This will return all available data from the user.
Email address not associated with this <account type="">. Verify address provided.</account>	In Certificate Distribution , confirm that the email address is associated with chapter or training center submitting the date.
Email address not associated with this <account type="">. Verify address provided.</account>	In Certificate Distribution , the instructor email did not match any Instructor data associated with the Chapter or the Training Center in the Salesforce database. If the email address is correct, this may require contacting the Customer Service Center. 1(800) 621-7615 or <u>customerservice@nsc.org</u>
Email address not associated with this <account type="">. Verify address provided.</account>	In Certificate Distribution , confirm that the email address is associated with the chapter or training center submitting the date.
This Training Center ID is not a sub-agency of your chapter.	In Certificate Distribution , confirm that the Training Center is associated with the chapter. This can be confirmed in the NSC Salesforce database. Customer Service can help. Call (800) 621-7615 or email <u>customerservice@nsc.org</u>
Email address not associated with this <account type="">. Verify address provided.</account>	In Certificate Distribution , confirm that the email address is associated with the chapter or training center submitting the date.
This Training Center ID is not a sub-agency of your chapter.	In Certificate Distribution , confirm that the Training Center is associated with the chapter. This can be confirmed in the NSC Salesforce database. Customer Service can help. Call (800) 621-7615 or email <u>customerservice@nsc.org</u>
This is not a valid email address.	Make sure the email address is correct, properly formatted and there are no spaces in address.
First Aid Digital Certificates were distributed successfully.	No action required. This is a success message.
Your instructor certification does not appear to be active. Please contact Customer Service.	This message will be seen if the Instructor signing in has an expired Instructor's license. Customer Service can help. Call (800) 621-7615 or email <u>customerservice@nsc.org</u>
The Digital Certificate Platform requires specific access permission. To have your account updated, please contact Customer Service.	When setting up a new account, Instructors should have immediate access to the Instructor Control Panel, but new Chapter or Training Center Administrators will need to contact NSC to have their access set up. Call (800) 621- 7615 or email <u>customerservice@nsc.org</u>