

# *NCCAOM® PDA Certificate of Completion*

Step-by-Step Distribution Instructions for PDA Providers



Step 1:  
Log into your PDA Provider Account.

Click on the “**Certificates**” button at  
the top of the page.

**Menu**

- PDAs Around the ... 9012
  - Home
  - Account Details
- Communication
  - General Inquiry
    - New
    - Show All

**Account**

- Update Profile
- Change Username
- Change Password
- Log Out

**Tools**

NCCAOM® Website

**Portal**

Logged In:

Welcome PDAs Around the World

New Course Application

Renew Courses

Annual Discounted Review App

Certificates

If you just set up your account, please continue by clicking on the **PDA Provider Application** button.

**Approved Providers:** Below is an overview of your PDA account. Included are active courses, courses eligib the status of an annual discounted review package, if applicable.

Items in the lists below that are underlined can be used for quick access to more information on that item.

Use the buttons shown to submit applications or take other actions. You have additional options and links to t information, and resources in the navigation panel to the left.

**System Message**

Course Application: • You have 2 incomplete course applications. [Resume](#)

**Account Overview**

**Profile**

PDA Provider Name	PDAs Around the World		
Website	<a href="http://patw.org">http://patw.org</a>		
Status	Active	Provider #	9012

**Responsible Party**

Name	Satya Alapati	Email	sadoe@mail.us
NCCAOM ID	11890	Job Title	Founder & Instructor
Credential	MSOM, Dipl. O.M. (NCCAOM), L.Ac.		

**Provider Contact Info**

Main Phone	678-555-8136	Cell Phone	678-555-1532
Fax			

**Additional Contact Info**


Name	John Smythe	Main Phone	678-555-9821
Email	jsmythe@mail.us	Cell Phone	678-555-4187
Address	4826 World Blvd. Suite 48 Indianapolis, IN 52250	Fax	







**Pending Course Applications**

Title	Type	Points	Submitted	Status
Educational Theories	Online	1		Incomplete
The Origins of Ethics and the Importance of Ethical Decisions	Online	4		Incomplete

**Courses Ready for Renewal**

Number	Title	Type	Expires
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 Dashboard  Certificate Template  Email Certificates  Bulk Distribution Records  Master Certificate List  Help


Welcome NCCAOM PDA @LD


The PDA Provider Dashboard allows you to enjoy the PDA benefits endorsed by the NCCAOM. We strive to provide the highest quality services for our Providers that include the following:

1. The ability to create, distribute, and track your NCCAOM® PDA Certificates of Completion.
2. Use of the interactive NCCAOM® PDA Provider Digital Badge that showcases your providership and courses in social media platforms.
3. Display of the NCCAOM® PDA Activity Logo on your website which offers immediate recognition of the course approval by NCCAOM.
4. Access to course marketing opportunities provided by the NCCAOM.


1


  
Certificate Template


  
Email Certificates

  
Master Certificate List

2

  
PDA Provider Digital Badge

  
PDA Activity Logo

  
Course Marketing Opportunities

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# NCCAOM PDA Provider Dashboard

1. Top Row – PDA Certificates distribution process
2. Bottom Row – Marketing Resources
  - PDA Provider Digital Badge
    - Interactive Badge that showcase Providership and list of actively approved courses.
    - need to be at 'Active' status with Certificate Template set up.
  - PDA Activity Logo
    - Logo for advertising
  - Course Marketing Opportunities
    - Link to [NCCAOM Continuing Education – PDAs](#).

## Step 2: Create a PDA Certificate Template

Making a template is only done once and remains in the database for when a PDA Certificate needs to be distributed.




Access also at the Dashboard


1. Upload logo (optional)
2. Upload Responsible Party's signature (required)
3. Add message to PDA staff (optional)
4. Other third-party approvals (optional)

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Profile **Template** Email Certificates Bulk Distribution Records Master Certificate List Helpful Links

2. Click the box next to the course number and enter the information (150 characters max). You may copy-and-paste the information into any of the course(s) that apply.  
Submit the Request: The PDA Certificate Template will be reviewed and approved by the PDA staff within two to three business days. Contact [PDA@TheNCCAOM.org](mailto:PDA@TheNCCAOM.org) for assistance or any changes.

**1**  **logicDeer**

**2** 

**3** Instruction for PDA Staff ⓘ  
Please approve test

**4**

Additional Third-Party Approval ⓘ ☒ Yes ☐ No ☐ Check All

☒ PDA-9012-2-Test Online this candidate is perfectly attended all sessions from online and offline, we are happy to aware this

☐ PDA-9012-3-Live Presentation Test Course

☐ PDA-9012-4-Distance Learning Test Course

## PDA Certificate of Completion



This verifies that

Jean Hulbert

State Ac#

is awarded

**7.5 PDA Points**

for completing the live course titled

*How to Teach Clinical Skills Online*

7/21/2020

Course Approval Date Range: 6/18/2020 through 6/18/2021

NCCAOM® Recertification Category:

PE:7.5

Satya Alapati  
MSOM, Dipl. O.M. (NCCAOM), L.Ac.  
NCCAOM PDA Course # PDA-9012-8



**logicDeer**

PDA's Around the World

4826 World Blvd., Suite 48, Indianapolis, IN. 52250

# Step 3:

## Distribute the PDA Certificate

There are 4 methods to select from:

1. Individual - one person at a time.
2. Bulk - multiple people (up to 500) at a time.
3. File Transfer Protocol (FTP) - arrange with the IT Department for setup.
4. API Bridge - arrange with the IT Department for setup.

Information needed from attendees:

- \* First & Last Name
- Date of Birth – not published
- NCCAOM ID #
- State Ac License #
- \* Email address

\* Required

Access also at the  
Dashboard



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### Email PDA Certificate of Completion

Providers may choose to distribute the PDA Certificate of Completion to individual participants, or a bulk distribution to many participants at one time or connect through a File Transfer Protocol (FTP) system. Providers interested in an API bridge may contact the PDA staff at [PDA@TheNCCAOM.org](mailto:PDA@TheNCCAOM.org). The Bulk Certificate Distribution or FTP must be used for conferences. Please email [PDA@TheNCCAOM.org](mailto:PDA@TheNCCAOM.org) if you need assistance. If you experience any errors relating to name or NCCAOM ID, please use our registry lookup tool to assist you. [Click Here](#)

View Certificate Template Assigned On: 01/24/2020 Assigned By: Jennifer Nemeth

1 2 3 4

Individual Certificate Distribution Bulk Certificate Distribution File Transfer Protocol API Detail

First Name Last Name Email

PDA Course #\* NCCAOM ID (If Applicable) Course Completion Date\*


PDA-1111-11 NCCAOM ID 08/06/2020

Birth Date (i) State Acupuncture License Number


MM-DD-YYYY State Acupuncture License


Once the 'PDA Course #' field is entered, the PDA points will automatically appear in the assigned recertification category below. Please contact the PDA Staff [PDA@TheNCCAOM.org](mailto:PDA@TheNCCAOM.org) if you have any questions.


AOM-BIO	AOM-AC	AOM-CH	AOM-OM
AOM-ABT	Ethics (ET)	Safety (SA)	PE-CW


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 View Certificate Template

Assigned On: 01/24/2020  
Assigned By: Jennifer Nemeth

 Individual Certificate Distribution

 Bulk Certificate Distribution

 File Transfer Protocol

 API Detail

First Name

PDA Course #\*

Birth Date ⓘ

Last Name

NCCAOM ID (If Applicable)

State Acupuncture License Number

Email

Course Completion Date\*

PDA-1111-11

NCCAOM ID

08/06/2020

MM-DD-YYYY

State Acupuncture License

Once the 'PDA Course #' field is entered, the PDA points will automatically appear in the assigned recertification category below. Please contact the PDA Staff [PDA@TheNCCAOM.org](mailto:PDA@TheNCCAOM.org) if you have any questions.

AOM-BIO

AOM-AC

AOM-CH

AOM-OM

AOM-ABT

Ethics (ET)

Safety (SA)

PE-CW

Email Certificate

## Individual Distribution

Fill in the attendee information. Once the PDA Course # is entered, the PDA points will appear in their assigned category at the bottom of the page.

Click on 'Email Certificate'

Click on the '[Master Certificate List](#)' at the top to see if the PDA Certificate was delivered successfully.




# Bulk Distribution


## Step 1:


Download the Attendees Record Template.


See the next slide for an example.





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 View Certificate Template

Assigned On: 01/24/2020  
Assigned By: Jennifer Nemeth

 Individual Certificate Distribution

 Bulk Certificate Distribution

 File Transfer Protocol

 API Detail

Instructions


- Download the 'Attendance Record Template' and save the file to your computer.
- Columns with the red asterisk are required. The blue section is for conferences only. Multiple courses may be listed, and 500 records are allowed per upload.
- Click on the 'Upload Attendance Record' button and select your spreadsheet file. The data will upload into the PDA Certificate system.
- To distribute the PDA Certificates, click on 'Email Certificates'.
- Go to the top of the page and select the 'Master Certificate List' tab to review the delivery status of each participant's PDA Certificate. Please contact the PDA staff at [PDA@TheNCCAOM.org](mailto:PDA@TheNCCAOM.org) if you need assistance.

1


Download Attendees record  
Template Excel format

Download Attendees record  
Template CSV format

2

 Upload Attendance Record

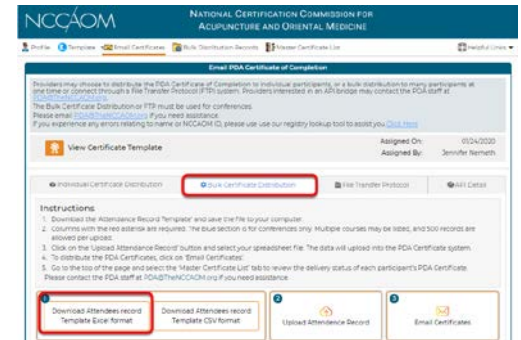
3

 Email Certificates

# NCCAOM PDA Attendance Record

## Step 2: Fill in the PDA Attendance Record

- Save the file to your computer
- Complete one row for each attendee
- \* indicate required fields
- *Do not modify the spreadsheet*
- Go back to the PDA Certificate Home Page to upload the file into the distribution system.



### NCCAOM PDA Attendance Record

**DO NOT MODIFY!** The spreadsheet will not upload if the formatting is changed. Columns with (\*) are mandatory.

[illegible]



## Step 3: Upload the PDA Attendance Record

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Profile Template **Email Certificates** Bulk Distribution Records Master Certificate List Helpful Links

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View Certificate Template Assigned On: 01/24/2020  
Assigned By: Jennifer Nemeth

Individual Certificate Distribution **Bulk Certificate Distribution** File Transfer Protocol API Detail

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- Click on the 'Upload Attendance Record' button and select your spreadsheet file. The data will upload into the PDA Certificate system.
- To distribute the PDA Certificates, click on 'Email Certificates'.
- Go to the top of the page and select the 'Master Certificate List' tab to review the delivery status of each participant's PDA Certificate. Please contact the PDA staff at [PDA@TheNCCAOM.org](mailto:PDA@TheNCCAOM.org) if you need assistance.

1 Download Attendees record Template Excel format Download Attendees record Template CSV format

2 Upload Attendance Record

3 Email Certificates

## Step 4: Email the PDA Certificates

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The Bulk Certificate Distribution or FTP must be used for conferences.  
Please email [PDA@TheNCCAOM.org](mailto:PDA@TheNCCAOM.org) if you need assistance.  
If you experience any errors relating to name or NCCAOM ID, please use our registry lookup tool to assist you. [Click Here](#)

View Certificate Template Assigned On: 01/24/2020  
Assigned By: Jennifer Nemeth

Individual Certificate Distribution **Bulk Certificate Distribution** File Transfer Protocol API Detail

#### Instructions

- Download the 'Attendance Record Template' and save the file to your computer.
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1 Download Attendees record Template Excel format Download Attendees record Template CSV format

2 Upload Attendance Record

3 Email Certificates

# Bulk Distribution Records

Providers can access 'At a Glance' the success or failure of the PDA Certificate distribution to attendees.

1. Imported file: file name
2. Total: number of certificates
3. Succeed: number successfully sent
4. Failed: number failed. Click on the number to see the details.
5. In-Progress: PDA specific field. Contact PDA staff if a number is present.
6. Export: download the attendance record.

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Search Imported From:  To:

This page displays all records for Bulk Distribution. You can view the records by clicking on the numbers in each column. You may download the original excel spreadsheet that contains the participant's information by clicking the arrow button in the 'Export' column. When fixing failed certificate entries, make sure to delete all other rows (participants) in the excel spreadsheet and correct only those entries that have failed. Upload the adjusted entries in the portal and check their status again.

Imported certificate file list						
Show <input type="text" value="10"/> Entries	1	2	3	4	5	6
Imported file	Total	Succeed	Failed	In-Progress	Processed On	Export
764 Follow up Certificates - 8-7_20200807134921014.xlsx	88	88	0	0	8/7/2020 12:49:21 PM	↓
764-39 Attendance - 300 lines (2)_202008171246327 21.xlsx	296	296	0	0	8/17/2020 11:46:33 AM	↓
764-39 Attendance - 300 lines (1)_2020081711490772 9.xlsx	296	295	1	0	8/17/2020 10:49:08 AM	↓
764 Follow up Certificates - 8-14_2020081416060921 3.xlsx	63	63	0	0	8/14/2020 3:06:09 PM	↓
764 Follow-up Certs 7-28_20200728105945146.xlsx	105	105	0	0	7/28/2020 9:59:45 AM	↓
Correct 764-40 NCCAOM Townhall Meeting - Week 12 - 500 lines (5)_20200727171113717.xlsx	173	173	0	0	7/27/2020 4:11:14 PM	↓
764-40 NCCAOM	496	496	0	0	7/27/2020 3:11:43 PM	↓
764 Follow up Certificates - 7-24_2020072412060278 6.xlsx	100	100	0	0	7/24/2020 11:06:03 AM	↓
764-42 NCCAOM	496	476	20	0	7/16/2020 9:14:36 AM	↓
764-42 NCCAOM	496	478	18	0	7/16/2020 8:07:20 AM	↓

Showing 1 To 10 Of 26 Entries

Previous123Next

Access also at the  
Dashboard



Master Certificate List

## Step 5: Check the Master Certificate List

The Master Certificate List houses all the Provider's PDA Certificates. You are no longer required to save them on your personal computer!

Once the PDA Certificates are emailed, check that they were distributed successfully.

1. Successfully distributed. You can download, view, resend or delete the PDA Certificates

2. Unsuccessfully distributed. Click on the envelope and the system will help determine what needs to be changed. Providers will need to make corrections and email the certificate again.

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Profile Template Email Certificates Bulk Distribution Records **Master Certificate List** Helpful Links

Search Certificate From: MM/DD/YY To: MM/DD/YYYY Today Yesterday

PLEASE NOTE: If the Diplomate's NCCAOM ID number is not listed in the box below, the PDA points were not uploaded to their Recertification Transcript. You may be contacted by the Diplomate to resolve the issue.

Action	NCCAOM #	Attendee Name	Course Name	Completion On	Issued On
↓ [Icons]	129677	John Smith	Test Online	7/31/2020	7/31/2020 12:29:59 PM
↓ [Icons]	10090	Jane Doe	Test Online	7/27/2020	7/27/2020 2:52:25 PM
↓ [Icons]	129677	John Smith	Test Online	7/12/2020	7/25/2020 4:17:03 PM
↓ [Icons]	129677	John Smith	Test Online	7/12/2020	7/25/2020 4:14:25 PM
↓ [Icons]	153320	Debbie Smith	Overseas Tour Test	7/12/2020	7/25/2020 2:58:38 PM
↓ [Icons]	18123	John Doe	Distance Learning Test Course	7/21/2020	7/21/2020 1:42:12 PM
↓ [Icons]	18123	Susie Johnson	Overseas Tour Test	7/21/2020	7/21/2020 1:39:14 PM
↓ [Icons]	18123	Susie Johnson	How to Teach Clinical Skills Online	7/21/2020	7/21/2020 1:37:08 PM
↓ [Icons]	18123	Susie Johnson	Live Presentation Test Course	7/21/2020	7/21/2020 9:32:14 AM
[Envelope Icon]			Distance Learning Test Course	1/1/0001	7/19/2020 9:07:19 AM
[Envelope Icon]			Distance Learning Test Course	1/1/0001	7/19/2020 9:07:19 AM
[Envelope Icon]			Distance Learning Test Course	1/1/0001	7/19/2020 9:07:19 AM

Download at the  
Dashboard



PDA Provider Digital  
Badge

## THANK YOU!

The NCCAOM and the PDA staff wish to thank all our PDA Providers for their patience and understanding as we navigated through the implementation of the new online management system. We value your participation in providing continuing education events for the NCCAOM Diplomates and practitioners in the acupuncture and Oriental medicine profession.

Now Available!

## *NCCAOM PDA Provider Digital Badge*



Need help or have questions or comments?

Email [PDA@TheNCCAOM.org](mailto:PDA@TheNCCAOM.org)