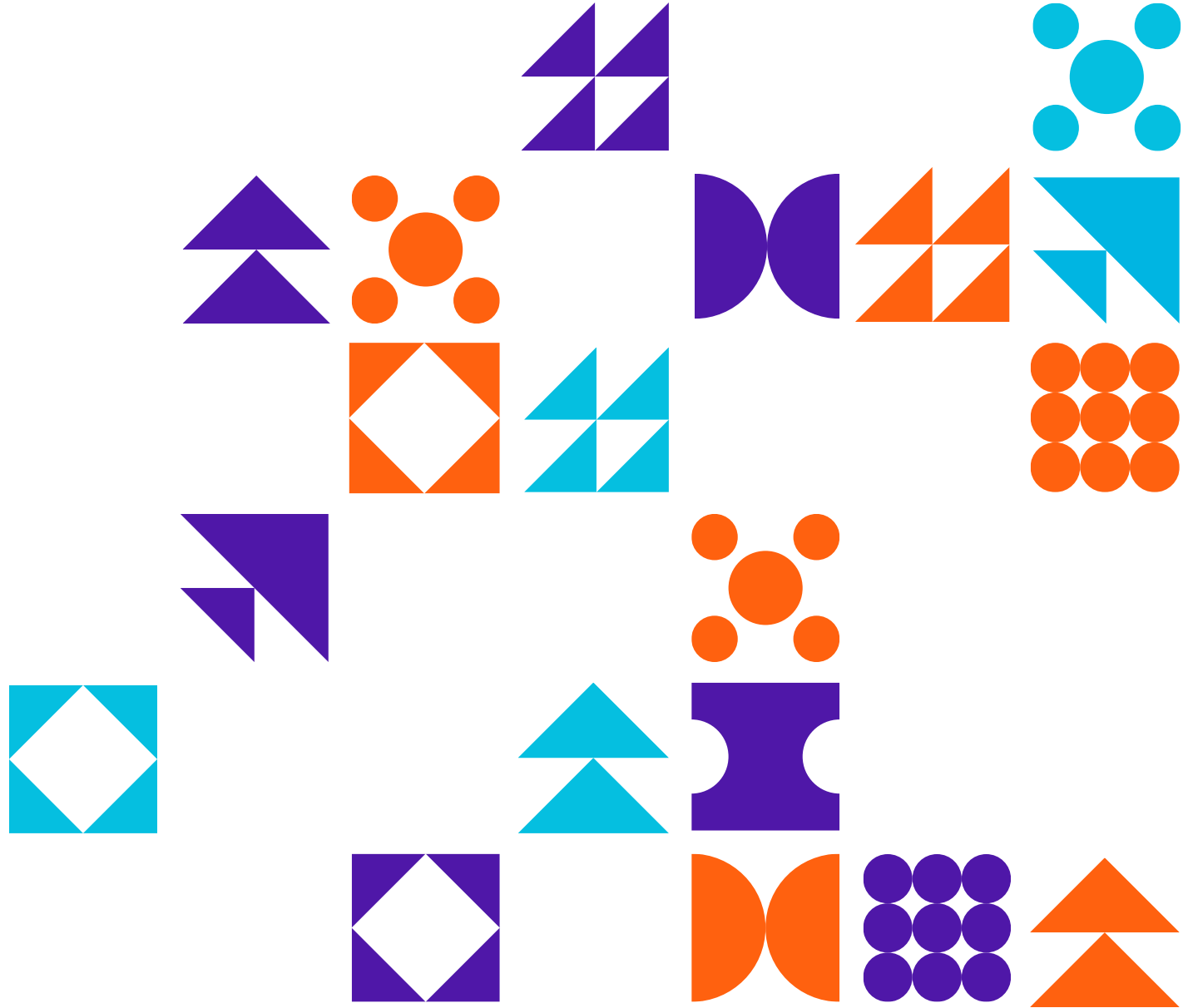


# EDUCATION PROVIDER PORTAL

User Guide

January 2021



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# Education Provider Portal (EPP) Access

To get started → Users must be registered with an account on [PMI.org](https://www.pmi.org) in order to access the Education Provider Portal.

- ❑ The default Administrator for the EPP account is the user who created the application for the ATP program. The Admin user can create courses and add additional users to the account. (See slide 24 for instructions.)
- ❑ Navigate to <https://www.pmi.org/account-registration> to create an account if you do not have one
- ❑ Once registered, you may access the Education Provider Portal at [provider.pmi.org](https://provider.pmi.org)



## Create an Account

Already have a PMI username and password? [Log in](#)

### Personal Information

First Name

Last Name

Primary Email

Please note that your primary email will be your user name when signing into your PMI account.

Email Preference (optional)

I would like to receive updates about PMI products, services, and events

Further information on PMI's processing of your personal data can be found in PMI's [Privacy Policy](#).



## Log In

Username

[Forgot Username?](#)

Password

[Forgot Password?](#)

**LOG IN**

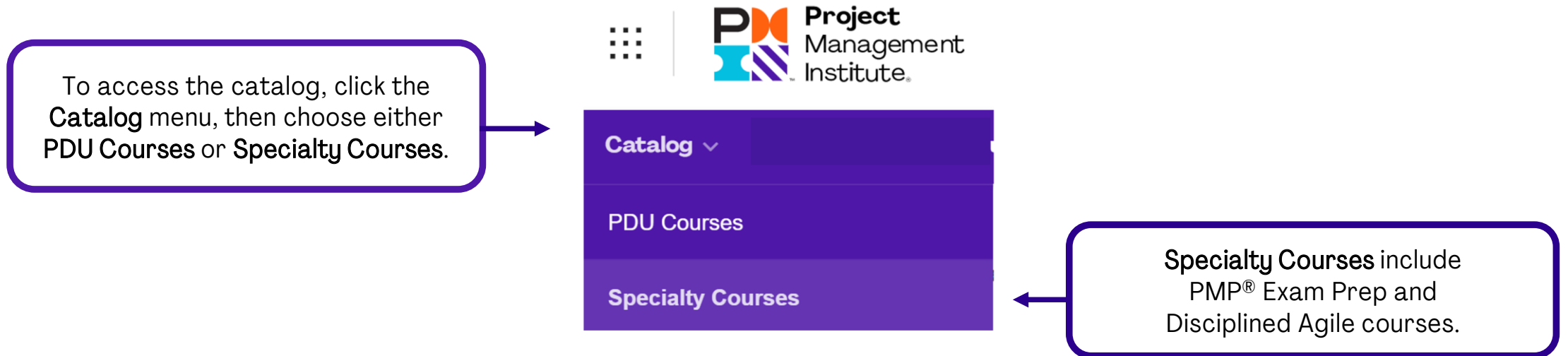
Don't have an account?  
[Register now](#)



# Managing Your Courses – Select a Catalog

The course catalog contains all the courses associated with a PMI Authorized Training Provider.

- ❑ Serves as the hub to create and access course information
- ❑ ATPs maintain PDU courses and Specialty Courses
- ❑ Specialty courses are PMP® Exam Prep and Disciplined Agile courses using PMI's licensed courseware



# Viewing Course Catalog - Searching for a Course

Input a keyword or identifier to locate a course.

Search

Search for Course ID, Course Name, or PDU Claim Code



Sort by your preference.

Sort By

Date (Newest-Oldest)

Date (Oldest-Newest)

Course ID # (Low-High)

Course ID # (High-Low)

Title (A-Z)

Title (Z-A)

Active is the default but you can filter by other status.

Filter By Status

Active

All

Saved

Submitted

Active

In Review

Rejected

Retired

Your current courses are listed here.

Course Identifier: R12023 | PDU Claim Code: 100355RTLQ | Status: Active | Date Updated: Jan 24, 2020 | Max PDUs: 6

Intercultural Competence

★★★★★(4)



Course Identifier: R12022 | PDU Claim Code: 1003UXFMLU | Status: Active | Date Updated: Jan 24, 2020 | Max PDUs: 7

Intercultural Competence

★★★★★(2)



Course Identifier: R13374 | PDU Claim Code: 1003W78XHC | Status: Active | Date Updated: Jan 23, 2020 | Max PDUs: 14

Leadership Skills for Managers

★★★★★(0)



# Search Results

Key information about the course includes course identifier, PDU claim code, status, date, PDUs, course title and user rating.

Perform edit functions on more than one course by selecting multiple check boxes.

Click **Export Catalog** to export all your courses.

| Course Identifier        | PDU Claim Code                           | Status   | Date Updated | Max PDUs |
|--------------------------|--|----------|--------------|----------|
| R12023                   | 100355RTLQ                               | Active   | Jan 24, 2020 | 6        |
| <input type="checkbox"/> | <a href="#">Intercultural Competence</a> | ★★★★★(4) |              |          |
| R12022                   | 1003UXFMLU                               | Active   | Jan 24, 2020 | 7        |
| <input type="checkbox"/> | <a href="#">Intercultural Competence</a> | ★★★★★(2) |              |          |

## EDIT FUNCTIONS

**Edit** allows you to make any changes to course details.

**Copy** duplicates an existing course to create a new course, with the similar details, that can be edited.

**Retire** removes and deactivates an out-of-date course or one that is no longer offered.

**Submit Claims** allows a batch PDU claim to submit PDU's on behalf of attendees.

# Editing Course Details

Click on course title link to open the details of the course.

Course Identifier: R12023 | PDU Claim Code: 100355RTLQ | Status: Active | Date Updated: Jan 24, 2020 | Max PDUs: 6

[Intercultural Competence](#)

★★★★★(4)

Click on the course name to provide the details of the course, which can also be edited here.

Training Partner Organization Name » [PDU Course Catalog](#) » Course Details

Rating: ★★★★★(4) | Claims: 4 | Status: Active

[Edit](#)

## Title

Intercultural Competence

## Course Identifier

R12023

## Course Type

PDU

# Specialty Courses – Enter Course Info

CREATE NEW COURSE ▾

**Note:** The Specialty course button is only active for ATPs with a qualified instructor.

PMP Exam Preparation Course

Disciplined Agile Scrum Master

Disciplined Agile Senior Scrum Master

## Add New Course

PMI will automatically assign PDU Claim code for participants to use to claim PDU's

1. Enter an **Activity ID** or number to track course. Field is alpha-numeric.

**Title** is prepopulated.

2. Enter the **Description** - a brief overview of the course and any critical information that potential customers need to know.

Enter Course Info Review & Submit Confirmation

Course Identifier \*

Activity ID

PMI Assigned PDU Claim Code

Participants can use this code to claim PDUs.

1003H2G9QM

Title \*

PMP Preparation Course

0 / 500 characters

Description \*

**B** *I* U ☰ ☰

**Note:** Only the first 500 characters of the description will display in course search results for students to view.

# Specialty Courses – Enter Course Info (continued)

3. List the skills and knowledge that a participant can expect to acquire after completing the course.

## Learning Objectives \*

0 / 5000 characters

The skills or knowledge that will be acquired by a participant in the course.

**B** *I* U ☰ ☷

4. Select the intended audience for the course (select all that apply).

## Course Availability \*

Intended audience of this course.

Public

Client

Internal

### COURSE AVAILABILITY OPTIONS

**Public** courses are available to anyone.

**Client** courses are intended for specific client use only.

**Internal** courses are only available to internal employees and not intended for the general public.

### COURSE AVAILABILITY OPTIONS for CHAPTERS

For Chapters, the options will be (select all that apply)

**Chapter Member** courses are exclusively for members.

**Non-Chapter Member** courses are available to non-members.

# Specialty Courses – Enter Course Info (continued)

5. Check at least one **Delivery Method** (select all that apply).

7. List several dates per course by clicking **Add Additional** and fill in appropriate fields.

CEU (Continuing Education Unit) hours will be automatically calculated based on internal PMI criteria.

## Delivery Methods \*

Available Live Streaming

|                      |                      |                         |        |
|----------------------|----------------------|-------------------------|--------|
| <input type="text"/> | <input type="text"/> | Select an instructor... | Remove |
| <input type="text"/> | <input type="text"/> | Select an instructor... | Remove |

ADD ADDITIONAL

Available Live In-Person

|                      |                      |                     |                         |        |
|----------------------|----------------------|---------------------|-------------------------|--------|
| <input type="text"/> | <input type="text"/> | Location (Required) | Select an instructor... | Remove |
|----------------------|----------------------|---------------------|-------------------------|--------|

ADD ADDITIONAL

ADD LOCATION

CEU Hours

35

6. **Select an Instructor** for each session listed. When you click on the drop down, you will see instructors that are related to your organization. You can **remove** and **add** another instructor if necessary.

## DELIVERY METHODS

### Available live streaming

Offered virtually at specific dates/times.

Ex: Virtual one-day conference

- You have the option of including a launch date that the course was or will be made available (not required).

## DELIVERY METHODS

### Available live in-person

Offered in a specific location on a specific date and time.

Ex: Instructor led training

- You have the option of including a launch date that the course was or will be made available (not required).

# Specialty Courses – Enter Course Info (continued)

8. Input the **web page** for the course where customers may go to learn more about the course and/or register. If a web page is not included, the course will not display in the course search results on pmi.org.

## Course Web Page

For more information about this course, participants should visit this URL.

www.pmi.org


9. Indicate the **Languages** the course is offered in. A drop-down of the languages associated with your profile will appear.

## Languages

Select an available language

10. If known, input the date the course will no longer be available and/or relevant.

## Retire Date

11. Select either **Save Progress** or **Continue to Review**.

SAVE PROGRESS

CONTINUE TO REVIEW

By entering a **retirement date**, the system will automatically put that course into a retired status on that specified date.

When a course is in retired status, PDUs can still be claimed against it as long as the course has been completed before the retired date.

PDUs can be claimed for up to four years past the retirement date.

# Specialty Courses – Review & Submit and Confirmation

12. Once the course entry is complete, select **Submit** to send your new course to PMI for review. You will receive an email from PMI once approved, or if there are any questions.

Review New Course

Enter Course Info Review & Submit Confirmation

Review your course information  
Make any changes before submitting.

Edit

EDIT SUBMIT

Click edit to change anything in the new course prior to submittal.

## Course Successfully Submitted!

Enter Course Info Review & Submit Confirmation

Your course has been submitted and will be reviewed by PMI within 5 business days.

You will receive an email notification once the course is approved or if there are any questions.

Once the course has been approved, your course participants can easily claim PDUs using this PDU claim code: 4980KHX2SU

PMI assigns PDU Claim code for participants to use to claim PDUs.

# PDU Courses – Enter Course Info

CREATE NEW COURSE

## Add New Course

Enter Course Info Review & Submit Confirmation

Course Identifier \*

Activity ID

Title \*

Description \*

**B** *I* U ☰ ☰

PMI Assigned PDU Claim Code

Participants can use this code to claim PDUs.

1003H2G9QM

1. Enter an **Activity ID** or number to track course. Field is alpha-numeric.

2. Enter the course **Title**.

3. Enter course description to provide a brief overview of the course.

PMI will automatically assign PDU Claim code for participants to use to claim PDU's

**Note:** Only the first 500 characters of the description will display in course search results for students to view.

# PDU Courses – Enter Course Info (continued)

4. List the skills and knowledge that a participant can expect to acquire after completing the course.

## Learning Objectives \*

0 / 5000 characters

The skills or knowledge that will be acquired by a participant in the course.

**B** *I* U ☰ ☷

5. Select the intended audience for this course (select all that apply).

## Course Availability \*

Intended audience of this course.

Public

Client

Internal

### COURSE AVAILABILITY OPTIONS

**Public** courses are available to anyone.

**Client** courses are intended for specific client use only.

**Internal** courses are only available to internal employees and not intended for the general public.

### COURSE AVAILABILITY OPTIONS for CHAPTERS

For Chapters, the options will be (select all that apply)

**Chapter Member** courses are exclusively for members.

**Non-Chapter Member** courses are available to non-members.

# PDU Courses – Enter Course Info (continued)

6. Check at least one **Delivery Method** (select all that apply).

## Delivery Methods \*

Available On-Demand  
[ ] [ ] Remove

Available Live Streaming  
[ ] [ ] [ ] Remove

ADD ADDITIONAL

Available Live In-Person  
[ ] [ ] Location (Optional) [ ] Remove

ADD ADDITIONAL

ADD LOCATION

### DELIVERY METHODS

#### Available on demand

Available continuously and is not tied to a specific place, date or time.

Ex: Asynchronous, online learning course

- You have the option of including a launch date that the course was or will be made available (not required).

### DELIVERY METHODS

#### Available live streaming

Offered virtually at specific dates/times.

Ex: Virtual one-day conference

- You have the option of including a launch date that the course was or will be made available (not required).

### DELIVERY METHODS

#### Available live in-person

Offered in a specific location on a specific date and time.

Ex: Instructor led training

- You have the option of including a launch date that the course was or will be made available (not required).

# PDU Courses – Enter Course Info (continued)

The professional development units (PDUs) should equate to the number of instructional hours for the course.

PDUs can be broken down to as small as 0.25 PDUs for a quarter of an hour.

7. Enter the PDU Allocation for this course.

**PDU Allocation \***  
Instructional hours spent on each area of the PMI Talent Triangle

|                                |                                 |                                 |   |
|--------------------------------|---------------------------------|---------------------------------|---|
| <b>Technical</b><br>0.00 Hours | <b>Leadership</b><br>0.00 Hours | <b>Strategic</b><br>10.00 Hours | <b>Maximum Total Hours</b><br>10.00 Hours |
|--------------------------------|---------------------------------|---------------------------------|---|

**Technical Hours Breakdown**  
Technical PDU values must correspond to actual instructional hours on indicated topics areas. Set the PDU values to reflect the appropriate course hours. If you feel this value is correct, this course will be submitted and reviewed.

|  |      |
|--|------|
| Project Management (PMP)                         | 0.00 |
| Program Management (PgMP)                        | 0.00 |
| Each certification below cannot go higher than 0 |      |
| Portfolio Management (PfMP)                      | 0.00 |
| Business Analysis (PMI-PBA)                      | 0.00 |
| Agile (PMI-ACP)                                  | 0.00 |
| Risk Management (PMI-RMP)                        | 0.00 |
| Scheduling (PMI-SP)                              | 0.00 |
| Certified Associate in Project Management (CAPM) | 0.00 |

Consult with the developer of the course or activity content if you are unsure of how to allocate PDUs across the areas of the [PMI Talent Triangle](#)®.

Some topics are broad and lend themselves to multiple areas of the talent triangle, so based on the specific content of the course, select the allocation that seems most appropriate.

**TECHNICAL HOURS BREAKDOWN**  
If **technical hours** are indicated, a section will appear that asks for the number of hours spent on topics relevant to the technical domains of portfolio management, business analysis, agile, risk and scheduling.

Project and Program Management hours will be pre-populated based on the total technical hours listed above.

Only input hours in the applicable technical domains based on your course content. In general, there should not be identical values across all technical areas in excess of a few PDUs.

# PDU Courses – Enter Course Info (continued)

8. Input the **web page** for the course where customers can go to learn more about the course and/or register.

## Course Web Page

For more information about this course, participants should visit this URL.

www.pmi.org


9. Indicate the **Languages** the course is offered in. A drop-down of the languages associated with your profile will appear.

## Languages

Select an available language

10. If known, input the date the course will no longer be available and/or relevant.

## Retire Date

11. Select either **Save Progress** or **Continue to Review**.

SAVE PROGRESS

CONTINUE TO REVIEW

By entering a **retirement date**, the system will automatically put that course into a retired status on that specified date.

When a course is in retired status, PDUs can still be claimed against it as long as the course has been completed before the retired date.

PDUs can be claimed for up to four years past the retirement date.

# PDU Courses – Review & Submit and Confirmation

12. Once the review is complete, select **Submit** to send your new course to PMI for review. Once approved, or if there are any questions, you will receive an email from PMI.

Review New Course

Enter Course Info Review & Submit Confirmation

Review your course information  
Make any changes before submitting.

Edit

EDIT SUBMIT

Click edit to change anything in the new course prior to submittal.

## Course Successfully Submitted!

Enter Course Info Review & Submit Confirmation

Your course has been submitted and will be reviewed by PMI within 5 business days.

You will receive an email notification once the course is approved or if there are any questions.

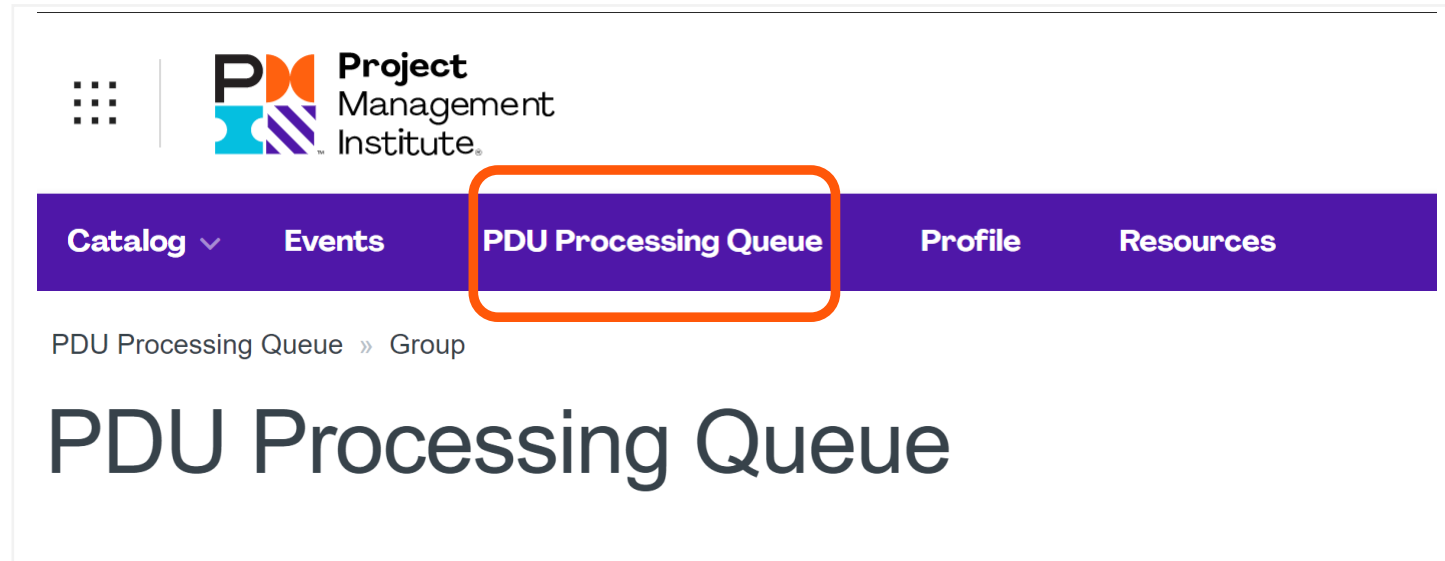
Once the course has been approved, your course participants can easily claim PDUs using this PDU claim code: 4980KHX2SU

PMI assigns PDU Claim code for participants to use to claim PDUs.

# PDU Processing Queue

PMI approved providers can submit PDU claims on behalf of certification holders.

- ❑ Submit a new batch PDU claims
- ❑ Check the status or add to a prior batch PDU claims submitted
- ❑ Search for batch PDU claims submitted previously
- ❑ Find key information about the batch claim: submitted date, who submitted it, claims within the batch, and status



# Submitting PDU Claims

## SEARCH OPTIONS

**Batch** searches on previously entered PDU batches.

**Event** searches by specific event.

To Submit a batch PDU claims, be prepared to provide:

- PMI ID (note, this is not the PMP or certification number)
- First name
- Last name

SUBMIT BATCH

Batch **Event**

Dates: 10/2/2020  11/2/2020

Status: All

Course Identifier:

Search for Batch ID:

SEARCH RESET GO

| Batch ID                  | Title             | Course ID      | Submission Date | Submitted By | Claim Requests | Status                |
|---------------------------|-------------------|----------------|-----------------|--------------|----------------|-----------------------|
| <a href="#">012345678</a> | (Multiple Titles) | (Multiple IDs) | 19/09/2017      | Doe, Jane    | 45             | Validation Error      |
| <a href="#">012345678</a> | PMP Prep Bootcamp | 1FJ6294A       | 19/09/2017      | Doe, Jane    | 20             | System Error          |
| <a href="#">012345678</a> | PMP Prep Bootcamp | 1FJ6294A       | 19/09/2017      | Doe, Jane    | 100            | Processed with Errors |
| <a href="#">012345678</a> | PMP Prep Bootcamp | 1FJ6294A       | 19/09/2017      | Doe, Jane    | 80             | Validation Error      |
| <a href="#">012345678</a> | PMP Prep Bootcamp | 1FJ6294A       | 19/09/2017      | Doe, Jane    | 22             | Processed with Errors |
| <a href="#">012345678</a> | PMP Prep Bootcamp | 1FJ6294A       | 19/09/2017      | Doe, Jane    | 11             | Processed with Errors |

Click on the column heading for easy sorting.

# Submitting PDU Claims (continued)

1. **Find the Course** you are submitting PDUs against by searching for the PDU Claim Code or Course ID.

2. **Add** the start and end date for the course.

## Submit Batch Claims

Find the Course

Search for Course ID or PDU Claim Code



Create a new course

CREATE NEW COURSE



PDU Claim Code



Course ID

You can **create a new course** to submit PDU claims against. Refer to previous pages for instructions.

# Submitting PDU Claims (continued)

3. Input the Dates.

4. Select Activity Type.

5. Use template to upload attendees.

6. Click Submit.

### Test for Claim Code

Date Started and Completed

10/12/2020 10/15/2020

| PMP  | PgMP | PMI-ACP | PMI-SP | PMI-RMP | PfMP | PMI-PBA | CAPM |
|------|------|---------|--------|---------|------|---------|------|
| 6.00 | 6.00 | 5.25    | 4.25   | 4.25    | 4.25 | 6.00    | 6.00 |

Activity Type

Course or Training  
Live, In-Person, or Streaming Class

On-Demand / Digital Media  
Webinars, Podcasts, Digital Recordings

Organization Meeting  
Chapter, company, or professional meetings.

#### Add Group of Attendees

Add attendees to this batch of claims. [Download Template](#)

Choose a file or drag it here

| From the file | Course Identifier | Options to Select | Status |
|---------------|-------------------|-------------------|--------|
|---------------|-------------------|-------------------|--------|

[Add individual attendee](#)

SUBMIT

Search for a person by PMI ID or First, Last name, and Country

PMI ID

First Name OR Last Name

Country

SEARCH CLEAR

Select the person to add to the batch.

| Person ID | First Na... | Last Na... | City | Country |
|-----------|-------------|------------|------|---------|
|-----------|-------------|------------|------|---------|

CANCEL ADD

Once you click on **Submit**, the system will then validate the attendee information you provided against PMI's database and flag any attendees that do not match. You can then work through any of these validation errors and search for the appropriate person within PMI's database.



# Provider Profile

Update your provider information by clicking on the Edit button for the applicable field.



**Note:** Chapters must contact their [Chapter Administrator](#) to make any updates or changes to the main contact listed for your chapter. These updates cannot be performed via the Provider Portal for chapters. In the future, users will manage this from the Authorized Training Partner dashboard so that it information is maintained within a single database and operation system.

# Provider Profile (continued)

## ATPs MAY EDIT

- Main Contact
- Provider Representatives details

### Main Contact

Elizabeth Tudor  
5555555555  
ETaylor.@gmail.com

### Provider Type

- Authorized Training Partner
- Academic Institution
  - PMI Chapter

### Enrollment Information

10/29/2020 - 10/28/2021 [View Certificate](#)

### Provider Representatives

Elizabeth Tudor [Remove](#)

**ADD NEW REPRESENTATIVE**

## PMI CUSTOMER CARE MUST EDIT

- Locations

### Locations <sup>?</sup>

Headquarters  
Drayton Gardens  
London, PENNSYLVANIA SW10 9RG GBR

## Add a New Representative

1. Be prepared to enter some details.
  - PMI ID
  - First Name
  - Last Name
2. Click **Search**.
3. Select or highlight the individual in the search results.
4. Click **Add**.

### Add Representative

Search our database by PMI ID or First, Last name, and Country

PMI ID

First Name  OR Last Name

Country

| First Name | Last Name | City | Country |
|------------|-----------|------|---------|
|            |           |      |         |

# FAQs

## Common Questions

### **Q: What is the difference between Specialty and PDU courses?**

A: The Specialty course template was created for the PMI Authorized PMP® Exam Prep courses as well as Disciplined Agile workshops. PDU courses are required to maintain certification status.

### **Q: My instructors are not listed for selection in my Specialty course template. How do I get them added?**

A: Any instructor that you designate to teach the PMP® Exam Prep course or Disciplined Agile workshop must be vetted and approved through the Provider Dashboard application. Log into <https://atp.pmi.org/> to create an application for a new instructor.

### **Q: How do I make sure my courses are in the Find an ATP course search?**

A: Only Specialty courses with an assigned authorized instructor will be searchable through the Find an ATP course search. Be sure to use the specialty course template and complete all the required fields.

# FAQs

## Common Questions

**Q: How do I determine who the Administrator is for my Education Provider Portal account?**

A: The default Administrator for the EPP account is the user who created the application for the ATP program. The Admin user can create courses and add additional users to the account. (See slide 24 for instructions.)

**Q: What if I don't know my user id or password?**

A: Use the **forgot username** or **forgot password** prompts on the log in page to verify your account or reset your password.