


# PTE Partners portal

Official  
User Guide  
2024



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# Overview



## Partnering with PTE has never been easier.

PTE Partners is a free web application designed to help you stay up to date with the latest English assessment news so you can support test takers. It makes referrals simple and give you access to plenty of useful content.

Don't miss out, join the thousands of agents already using this online portal to build their business and reputation.

This guide has been designed to provide you with everything you need to get started. You'll find an overview of PTE, a step-by-step guide to getting started and plenty of guidance on how to use the portal to support Test Takers.

“

*The exam-booking portal has been a life-saver in terms of storing all the student data and saving time, without any glitches. And the incentives offered by Pearson are like the icing on the cake.*

International Education Services & Consultancy

”

“

*We are incredibly pleased with the Pearson Partners portal and its remarkable technology features which have enabled us to save a lot of valuable time. We are profoundly thankful to Pearson for giving us access to such an extraordinary platform.*

Diamond Path Immigration

”

# Introducing: Pearson Test of English (PTE)



Don't miss out – Join today free.

## Pearson Test of English (PTE)

**Pearson Test of English (PTE)** is our flagship suite of English tests. Designed to get test takers where they want to go. Faster, fairer, and simpler, PTE is the 'worry-free' test of choice for test takers each year. PTE is widely accepted **globally** and is supported by plenty of resources to help test takers achieve their desired score.

### Which PTE test is which?

#### PTE Academic

Accepted by 3300+ institutions for academic studies. This is the test to study overseas or for migration to Australia and New Zealand.

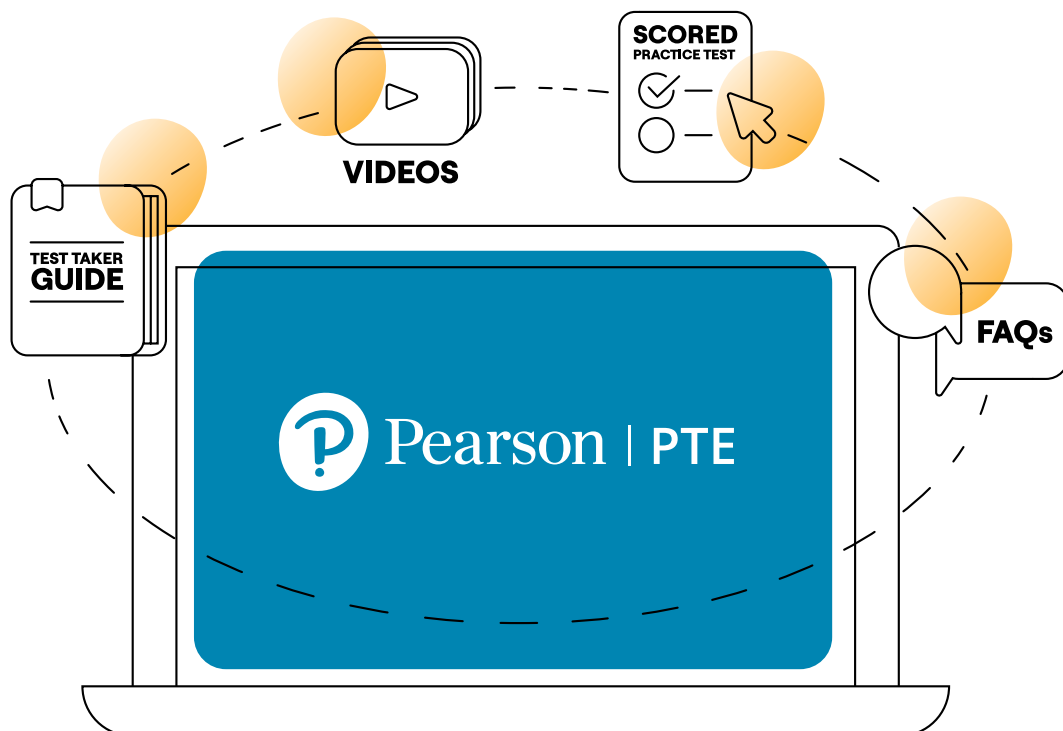
#### PTE Core

The test of everyday English approved for all work and migration visas to Canada, as well as Canadian citizenship.

#### PTE Home

For test takers looking to make the UK their permanent home.

There are three options to choose, depending on the visa being applied for.



# The 'worry-free' English test

Taking an English test can be stressful and there's a lot of pressure on your test takers to get the scores they need. That's why we have designed our PTE English tests to take the stress out of English proficiency testing.

## Here's how:

### Faster



1. Go worry-free with one 2-hour test.
2. Celebrate results typically within 48 hours.

### Fairer



- No more biased English tests.
- Tried and tested technology which scores every test with precision.

### Simpler



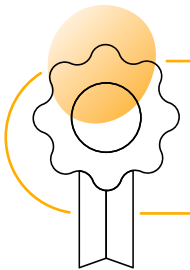
- One single test in one single appointment.
- Prepare with confidence and be worry free with a wealth of resources and support.

### Trusted



- Our PTE tests are so widely accepted it would be quicker to tell you who doesn't accept them. Check out our up-to-date recognition list on our website [here](#).

### Prepare with confidence



- An extensive range of resources to prepare test takers for their test. From scored practice tests to online courses - however they like to prepare we have got it covered.

## Want to dive deeper into our technology?

- Watch our video on the role of AI in PTE [here](#).
- Find out how our automated scoring and algorithms [work](#).
- Want even more insight? Download our 'Scoring' White Paper [here](#).

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# What is PTE Partners?





Our free PTE Partners portal is your dedicated web platform designed especially for partners, to make booking tests on behalf of test takers faster and simpler.

- ✔ Allows partners to act on behalf of their clients at all stages of their PTE journey
- ✔ Makes referrals simple
- ✔ View booking numbers
- ✔ Purchase vouchers
- ✔ Complete additional training to become a 'Certified Associate'
- ✔ As a member you will receive monthly newsletters and invitations to exclusive webinars throughout the year

## There are three key ways you can engage with test takers on PTE Partners

### Booking on Behalf

Gives you visibility and control over all test bookings so you have the ability to provide a full registration service, including payment.

### Referral Matching

The same visibility and control as Booking on Behalf, without the need to make payment and gather information.

### Referral Link

A simple, light touch way of making referrals to test takers.

## What can you do on the PTE Partners portal?

### Add test takers

- ✔ Create a new test taker account
- ✔ Associate with an existing test taker
- ✔ Update test taker data
- ✔ Manage parent/guardian consent
- ✔ Access PTE Referral Link

### Cancel or reschedule bookings

- ✔ Identify preferred test center
- ✔ Search for availability
- ✔ Pay
- ✔ Reschedule

### Manage results

- ✔ Receive results
- ✔ Review results
- ✔ Assign results to institutions
- ✔ View Partner booking numbers

**Ready to get started?** – See section 4 to find out how to sign up.

4

 Pearson | PTE

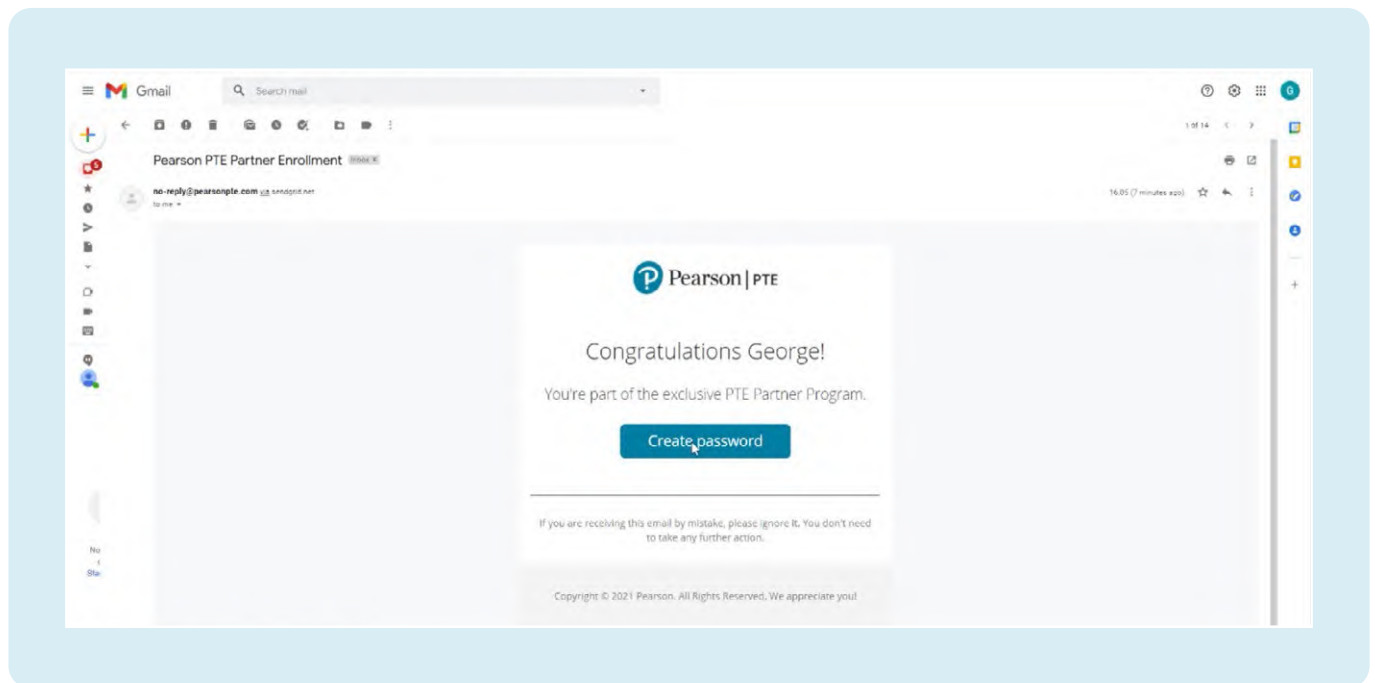
# How to sign up



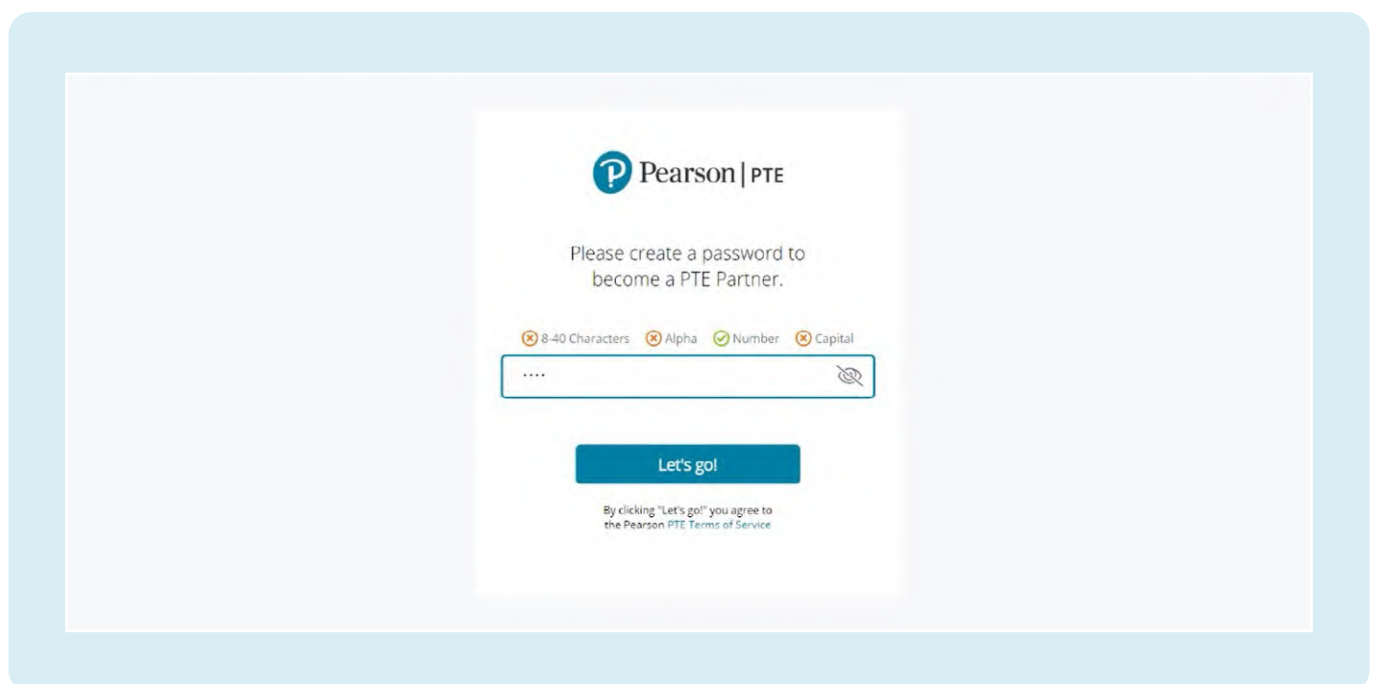
# 1. Invitation to create your account

First you'll receive an email from Pearson PTE. Click '**Create password**' to begin creating your account.

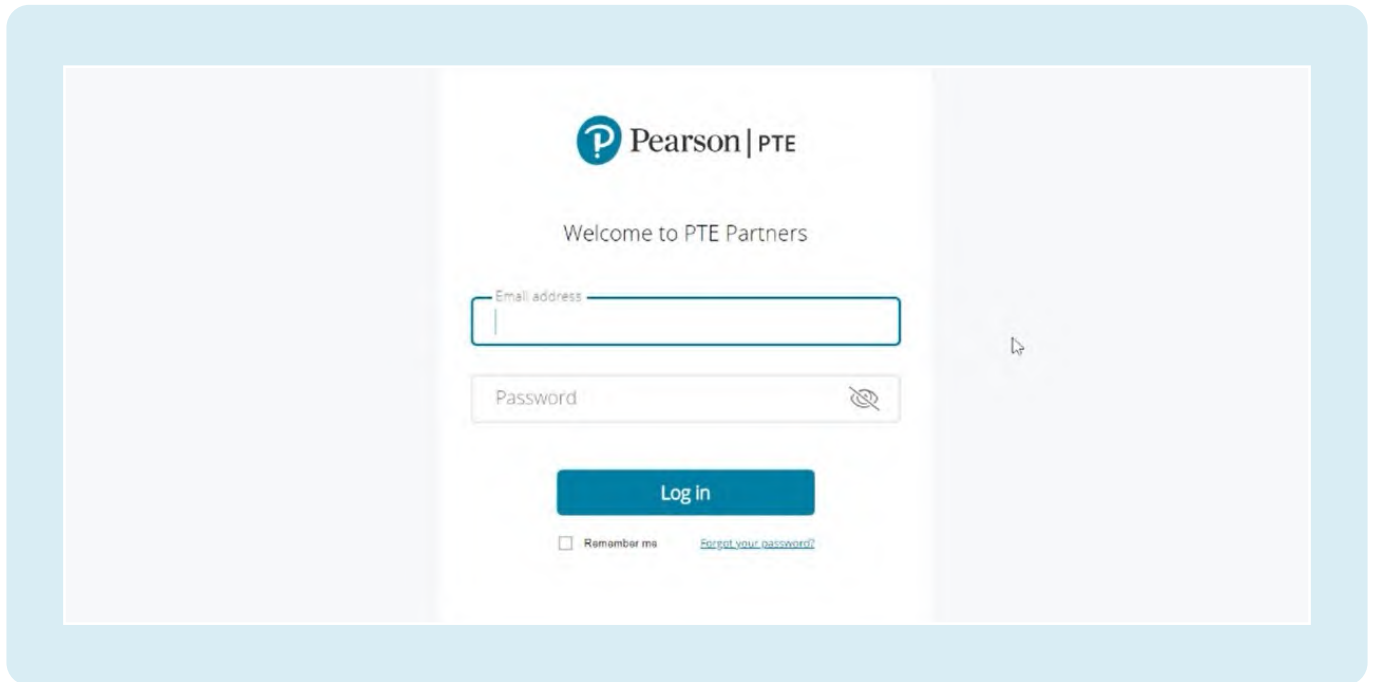
It is essential that you use a different email if you already have a myPTE or Score Report Website (SRW) account. We also recommend that you clear your cookie cache before entering the portal, although this is not essential.



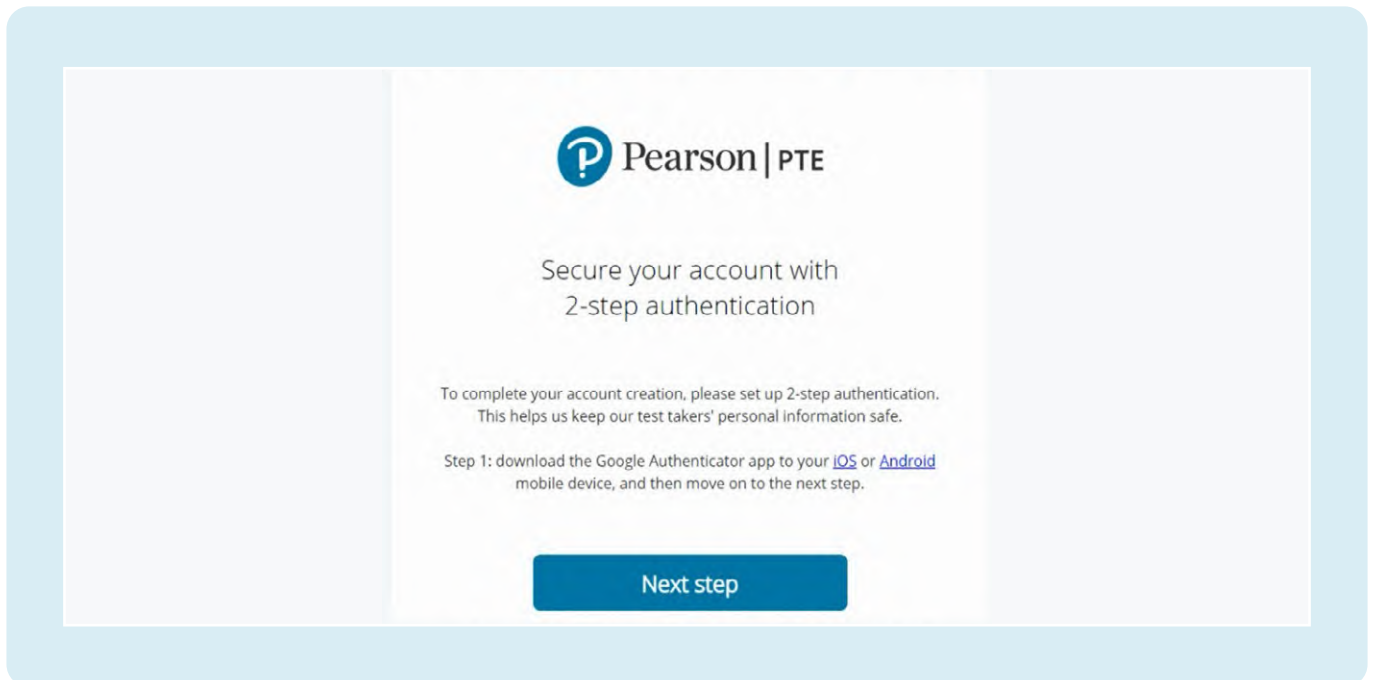
- Set your password for PTE Partners. The acceptance criteria for the password will turn green and ticked when met.



- Now sign into PTE Partners using your email address and the password just set.



- Set up multi-factor authentication (MFA). We recommend you use the Google Authenticator app, however there are alternative authentication services which would also work.
- To begin, download your chosen authenticator application, then click '**Next step**'.



- To set up the MFA for the first time, you will need to either scan the QR code or manually enter the code on screen into your authentication application.
- Sign in using MFA. You achieve this by visiting the MFA app you have just set up, and entering the code provided when requested during the sign in page.

### MFA issues:

If you face issues with MFA, please view the workaround outlined below. In certain territories, including China, there may be some limitations with how the MFA app works. These may include:

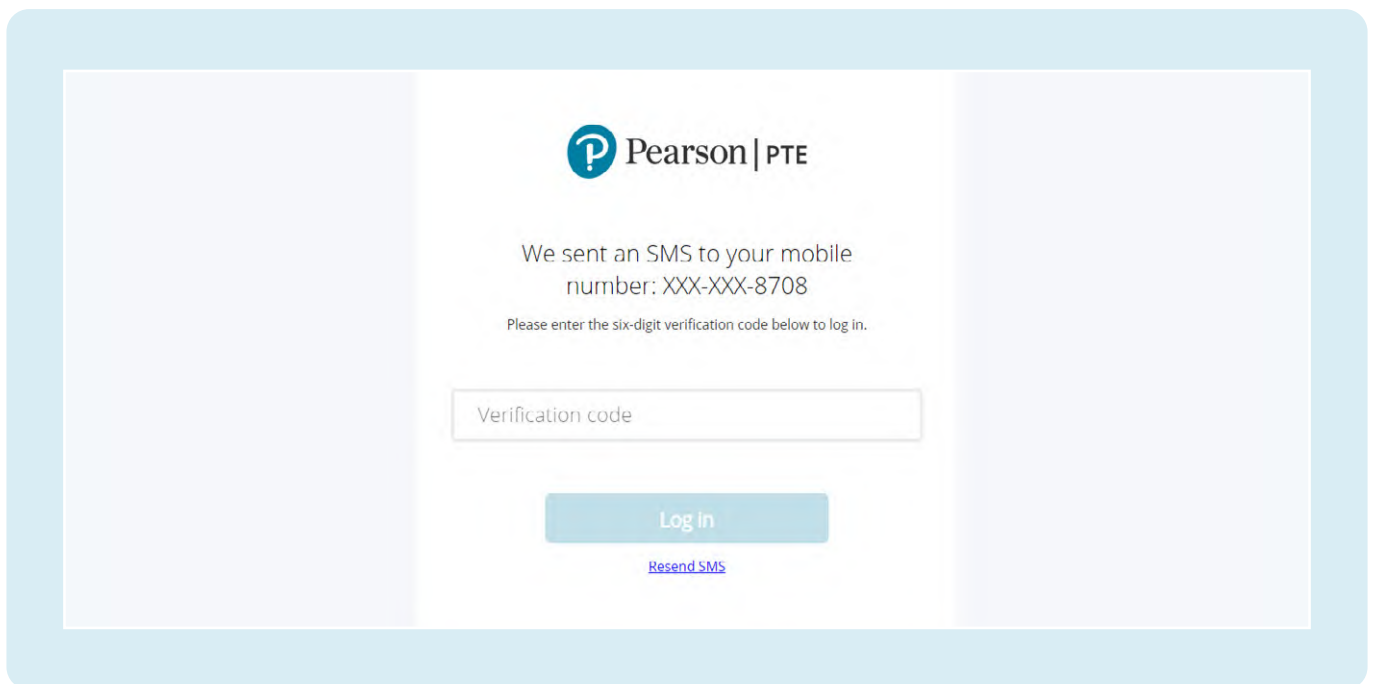
- registration of the authenticator app as a MFA method using push notifications doesn't work.
- phone sign-in can't be set up, as it requires the user to set up the app as an MFA method using push notifications, which currently don't work.

### MFA workaround:

This workaround uses SMS to share the one-time code. To access this flow, users will need to click on the SMS link on the MFA page, which is underneath the QR code and the manual key.

Instead of using push notifications for MFA, users set up their authenticator app to receive verification codes on their device that they can use for MFA to verify their identity.

These verification codes are valid for 30 seconds and to use them, admins must enable the user to perform verification using Time-based One-Time Password (TOTP) verification codes.



- Set up your account as a Partner user by completing details of your head office. This is a compulsory step in completing your Partner account.

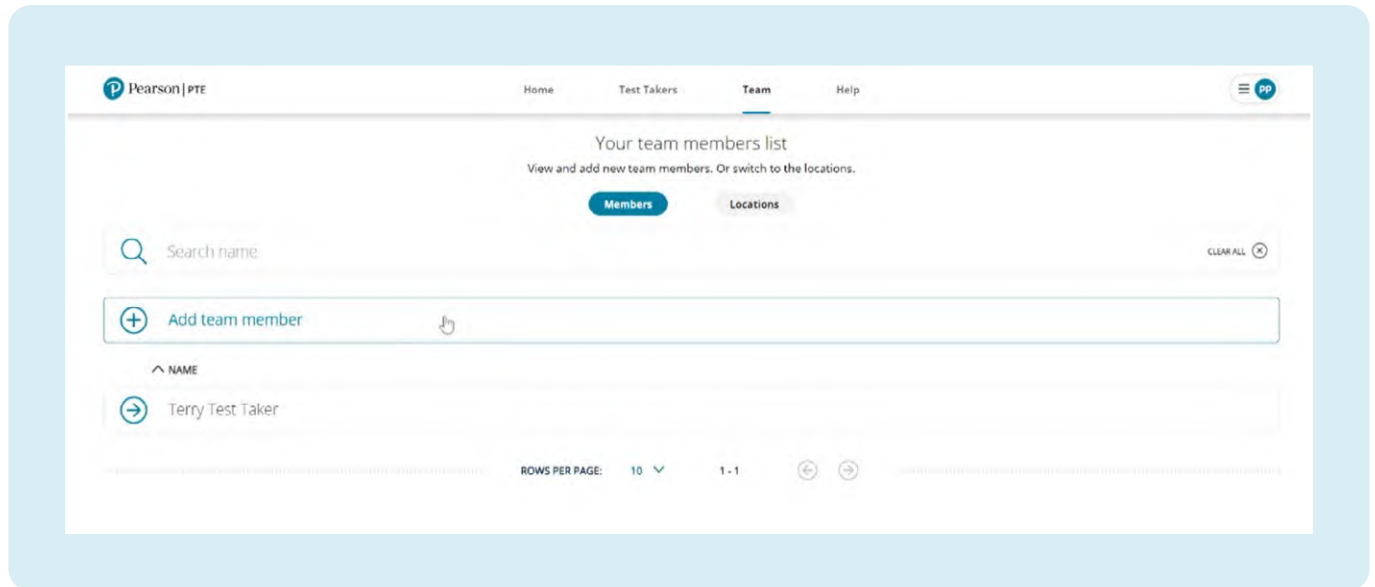
The screenshot shows a web form titled "Welcome George Elliott - Partner User Guide 0.3c. This will be your head office." Below the title, it says "Please complete all the fields below. You'll then be able to add your first team member." The form has a blue header bar with "London" entered. Below this are several input fields: "Location name" (with "London" entered), "Phone number" (with a red border and a message "Phone number is required"), "Address 1", "Address 2 (optional)", "Country", "City", "State/Province", and "Zip/Postal code". At the bottom, there is a blue "Create head office" button.

- Once you have created your first location, you have the option to add your first team member. This step is not compulsory.

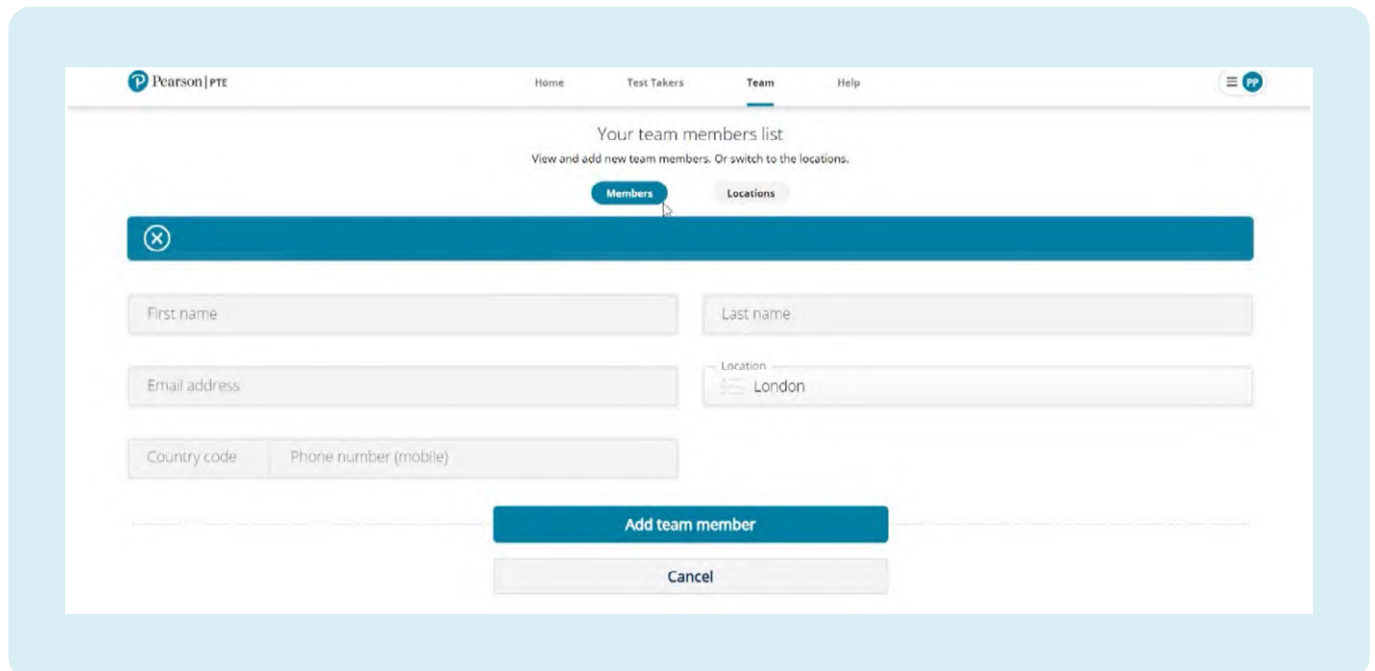
The screenshot shows a web form titled "You've created your first location. Now add your first team member" with the subtext "You may assign a team member to one or multiple locations." There are two tabs: "Members" (selected) and "Locations". Below the tabs is a blue header bar with "Terry" and a close icon. The form includes input fields for "First name" (with "Terry" entered), "Last name", "Email address", "Location" (with a dropdown menu showing "London"), "Country code", and "Phone number (mobile)". At the bottom, there are two buttons: a blue "Add team member" button and a grey "Cancel" button.

### 3. View existing and set up new Team Members and Locations

- You can view existing and set up new Team Members and Locations any time by clicking **'TEAM'** on the upper dashboard.
- To view your Team Member list, click **'Members'**
- To add new, click **'Add Team Member'**



- Fill in Team Member details.

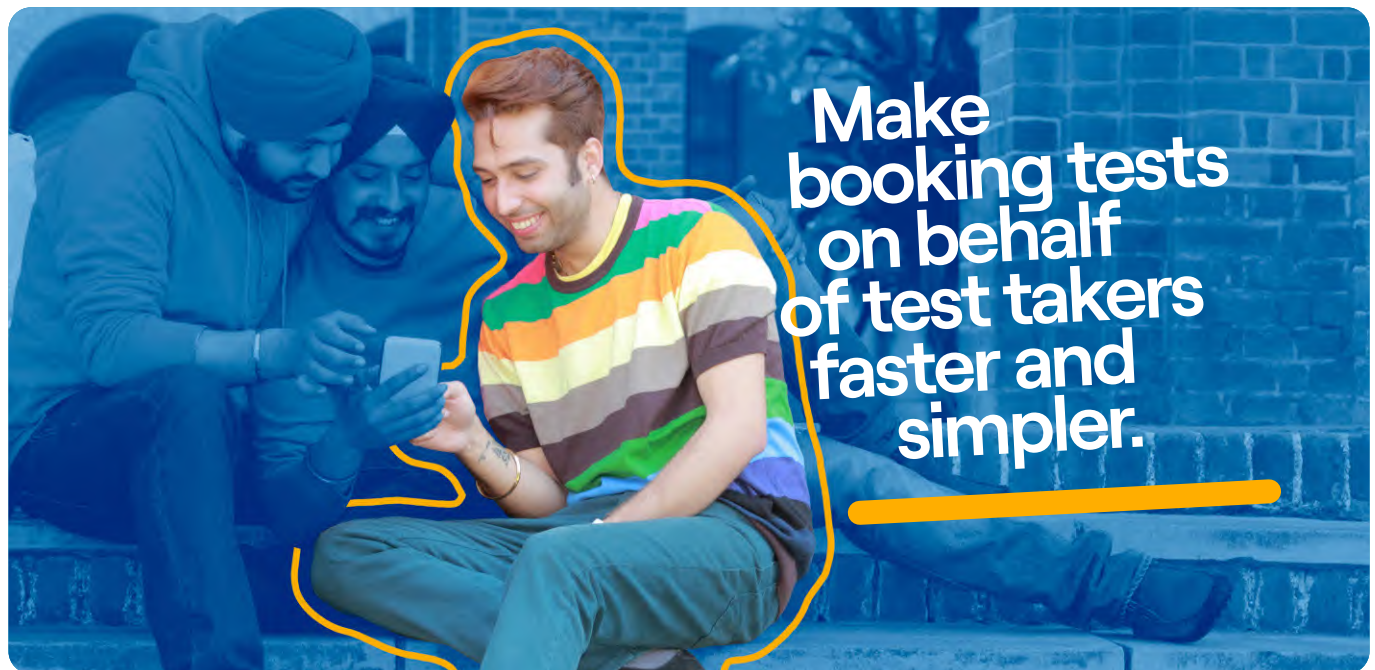
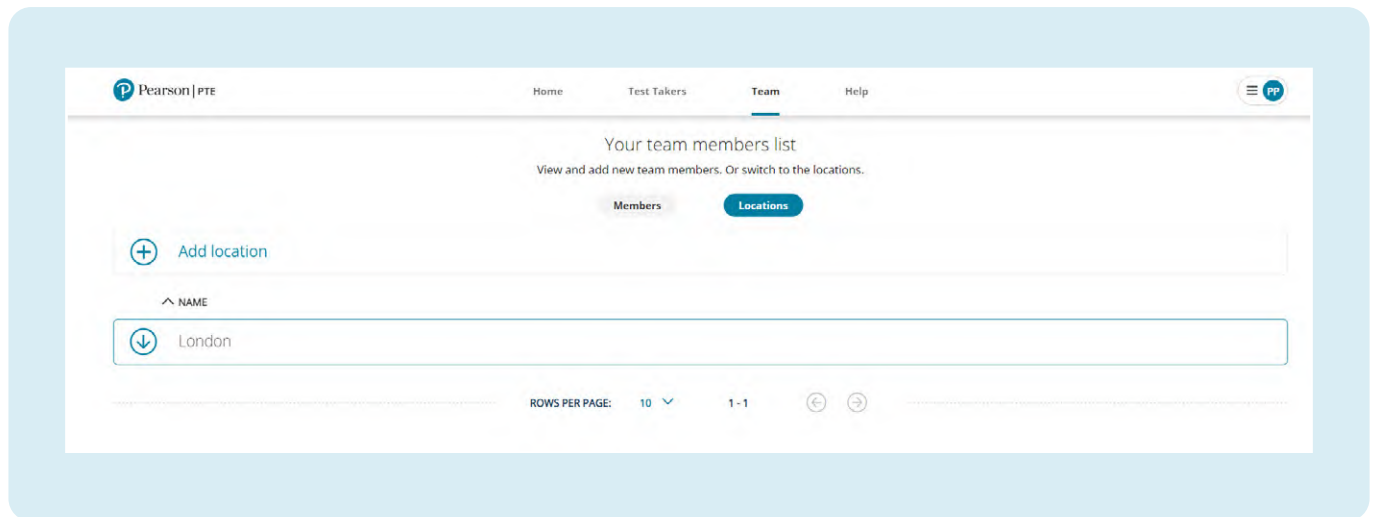


- The location field will self-populate if you only have one head office location.

However, if you have multiple locations, you will need to associate a team member with one or more of those locations. In this circumstance, you'll see a drop down and you will have the choice of which of the locations you wish to associate this team member with.

Once the necessary fields are completed, click **'add Team Member'**. This will create a Team Member account. This Team Member will now receive a similar email to the one you did as a Partner. The Team Member will then be able to set up a password and multi-factor authentication.

- You can also view and manage your Locations from the **'Team'** tab.
- Click **'Locations'** to view your existing locations.
- To add a new Location, click **'Add Location'**.





There is now more than one type of PTE Partners user, to add more flexibility to onboarding users to the platform. These new roles are:

## Partner Administrators

This user has the following abilities:

- Create and maintain Partner locations
- Create and maintain all Partner user types:
  - (Partner Administrators, Location Administrators and Team Members)
- View and maintain all the Partner’s Test Takers (whatever the location)

## Location Administrators

This user has the following abilities:

- Create and maintain Team Members for locations that they are assigned to
- View and maintain Test Takers for Locations that they are assigned to

## Team Members

Existing Team Members can be promoted. Promotion is allowed from a Team Member to either a Location Administrator or Partner Administrator, and from a Location Administrator to a Partner Administrator. Only Partner Administrators can promote users, and users cannot be demoted to a lesser role.

- To do this, go to the ‘**Team**’ tab, click on the Team Member you want to promote, and choose the new role you want to give them.
- After clicking ‘**Save user**’, the Team Member will automatically be assigned to their new role.

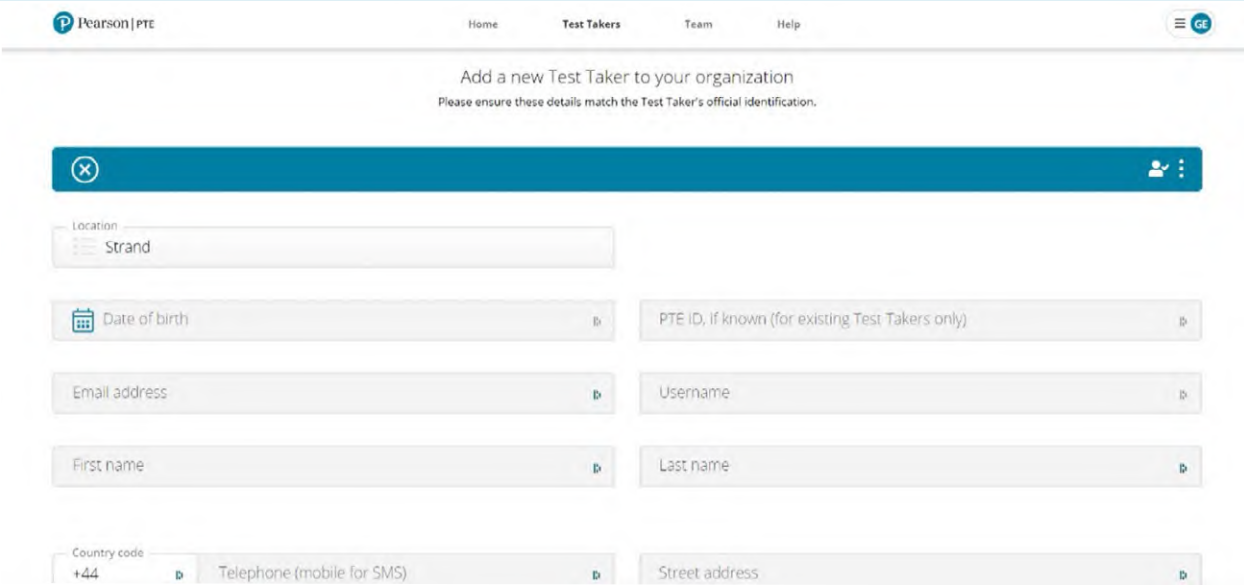
The screenshot shows a user profile for William Franks. At the top, there is a blue header with a close button and the name 'William Franks'. Below this, there are several input fields and a dropdown menu. The 'Role' dropdown is currently set to 'Team Member' and is open, showing three options: 'Team Member', 'Location Administrator', and 'Partner Administrator'. The 'Location' field is set to 'Dreams head office'. The 'Last name' field contains 'Franks'. The 'Country code' field is set to '+1' and the 'Phone number (mobile)' field contains '(778) 564-2345'. At the bottom of the form, there are two buttons: 'Save user' (highlighted in blue) and 'Cancel'.

## 4. Adding Test Takers

You can add Test Takers in two ways. The first is where the Test Taker is new to the system, and you will therefore need to create their account to set them up.

### To enter a Test Taker manually:

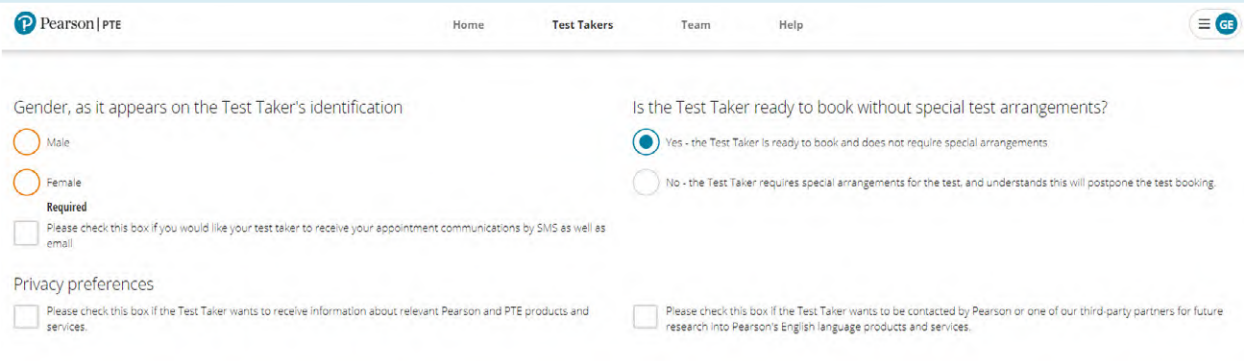
- First, click '**Add Test Taker**' on homepage
- Complete details of Test Taker



The screenshot shows the 'Add a new Test Taker' form in the Pearson PTE system. The form is titled 'Add a new Test Taker to your organization' and includes a note: 'Please ensure these details match the Test Taker's official identification.' The form fields are as follows:

- Location: Strand
- Date of birth: [calendar icon]
- PTE ID, if known (for existing Test Takers only): [text input]
- Email address: [text input]
- Username: [text input]
- First name: [text input]
- Last name: [text input]
- Country code: +44
- Telephone (mobile for SMS): [text input]
- Street address: [text input]

- You can tick the SMS opt in check box if you believe the Test Taker would like to receive important updates via SMS as well as email. By default, it is set to no.

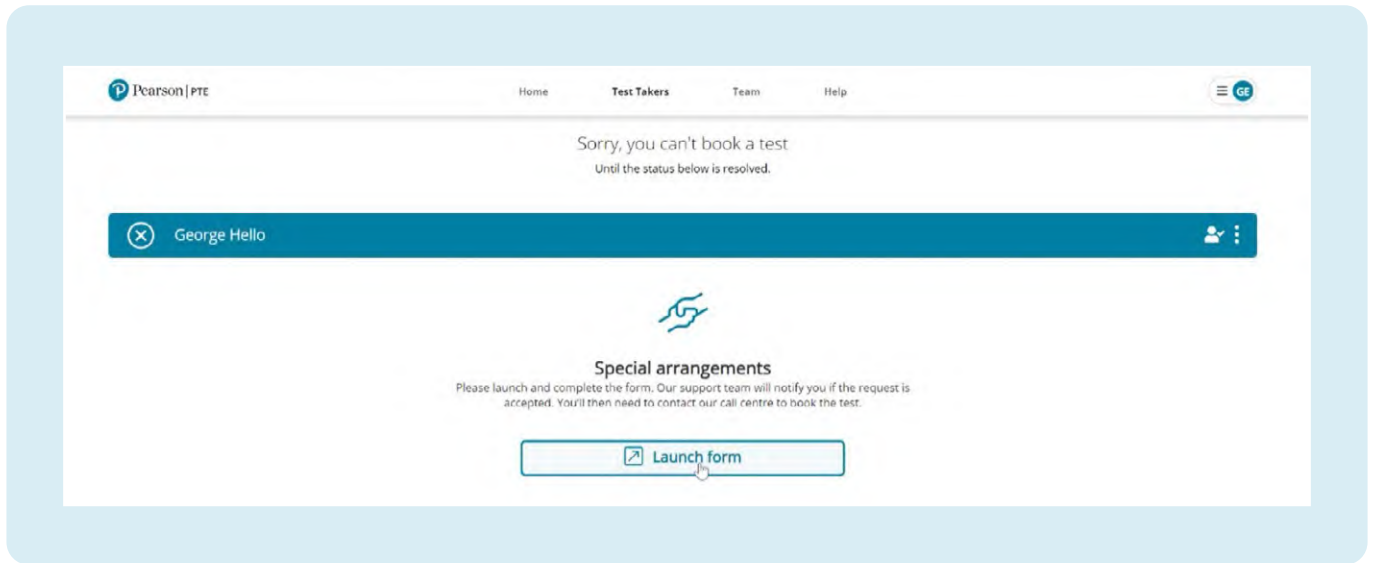


The screenshot shows the 'Add a new Test Taker' form in the Pearson PTE system, focusing on the 'Gender' and 'Is the Test Taker ready to book without special test arrangements?' sections. The form fields are as follows:

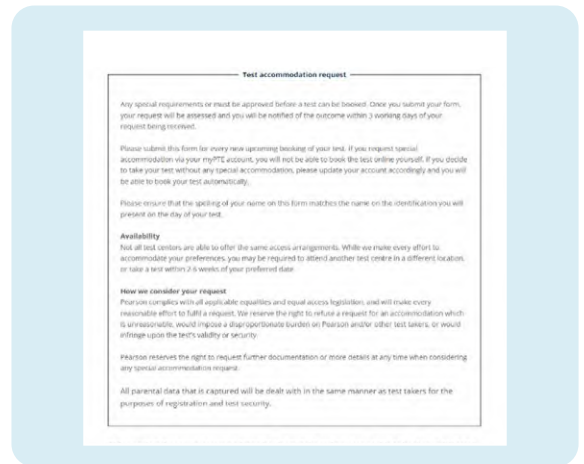
- Gender, as it appears on the Test Taker's identification:
  - Male
  - Female
- Required:
  - Please check this box if you would like your test taker to receive your appointment communications by SMS as well as email.
- Privacy preferences:
  - Please check this box if the Test Taker wants to receive information about relevant Pearson and PTE products and services.
  - Please check this box if the Test Taker wants to be contacted by Pearson or one of our third-party partners for future research into Pearson's English language products and services.
- Is the Test Taker ready to book without special test arrangements?:
  - Yes - the Test Taker is ready to book and does not require special arrangements
  - No - the Test Taker requires special arrangements for the test, and understands this will postpone the test booking.

- You can select when the Test Taker will need special accommodations or not.

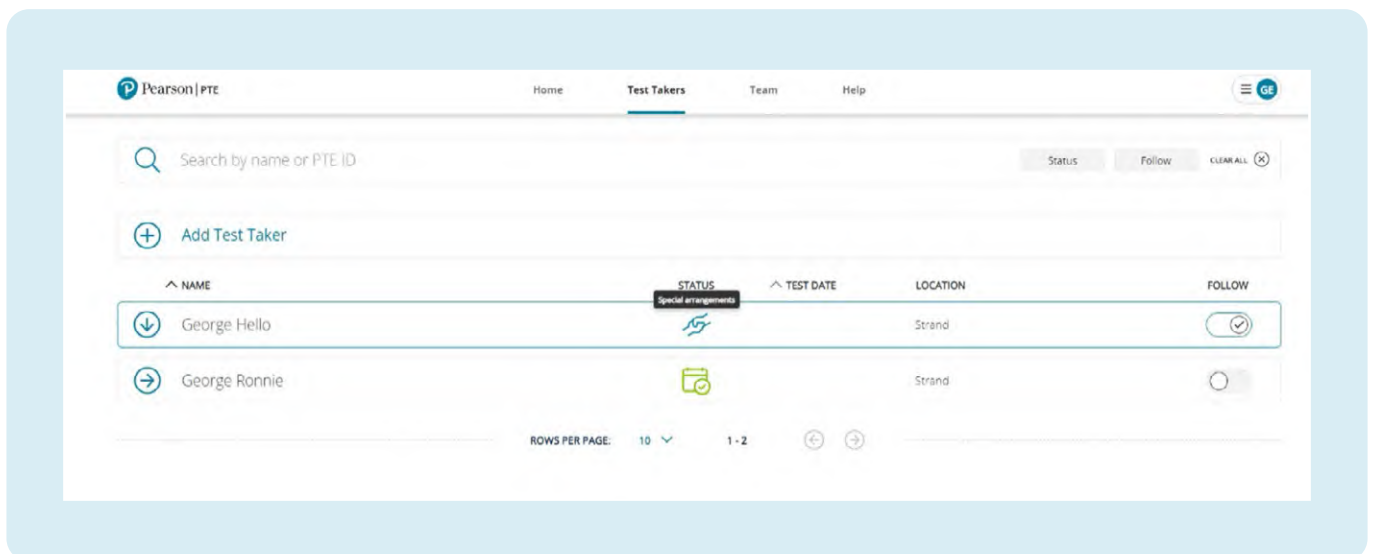
- If the Test Taker requires special arrangements, an additional step will be required. You will not be able to book a test for this Test Taker until the Test Taker completes and returns the special arrangements form. Click **'Launch form'**.



- Launch the **'Special arrangements form'**, which the Test Taker needs to complete and return.



- If the Test Taker requires accommodations, there will be a status in the Test Taker Grid to reflect this.



- You will also need to select the privacy preferences for the Test Taker.

Privacy preferences

Please check this box if the Test Taker wants to receive information about relevant Pearson and PTE products and services.

Please check this box if the Test Taker wants to be contacted by Pearson or one of our third-party partners for future research into Pearson's English language products and services.

Test Taker is under 18 and requires parental consent.

Email  SMS  PDF

Parent or guardian email

Email address is required

Parent or guardian first name


First name is required

Parent or guardian last name

Last name is required

Provide parental consent in Simplified Chinese

- If Test Taker is under 18, they require additional parental consent. A pop up will load at the bottom of the screen.
- To complete this step, their Test Taker's parent or guardian will need to grant their consent. This can be done via email, SMS or by downloading and reuploading a signed PDF.
- Test Takers can now provide parental consent in Simplified Chinese. This is available via PDF and email.



**Parental consent**

Test Taker is under 18 and requires parental consent.

Email  SMS  PDF

Parent or guardian email

Parent or guardian first name

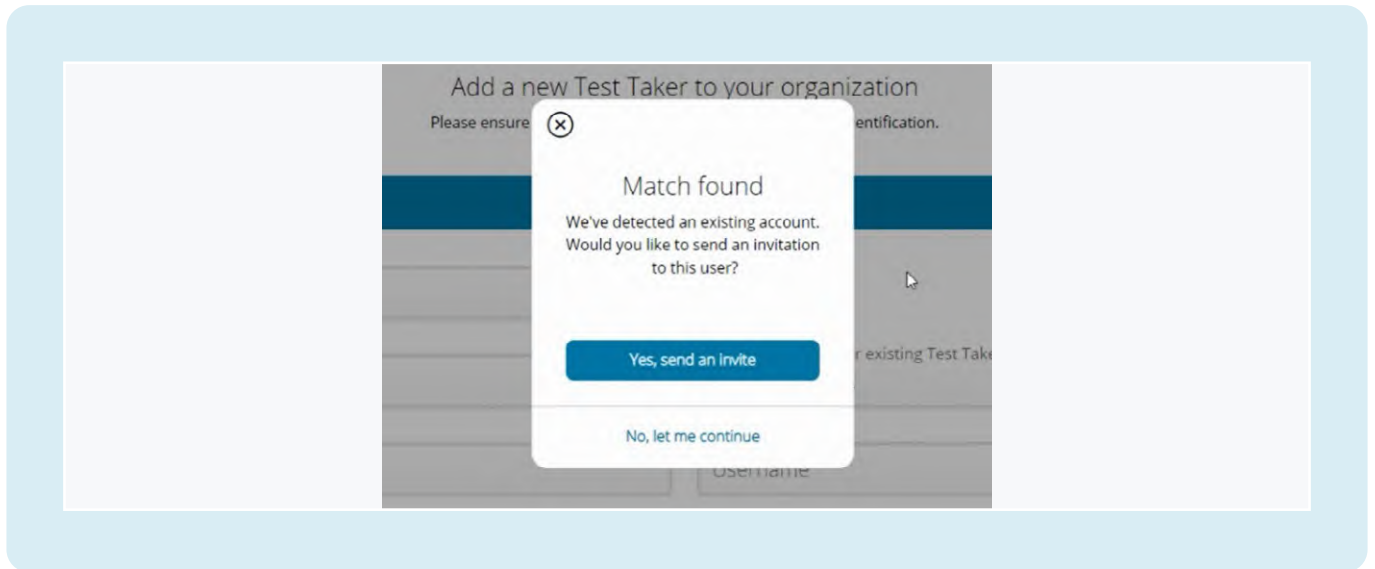
Parent or guardian last name

**Resend consent**

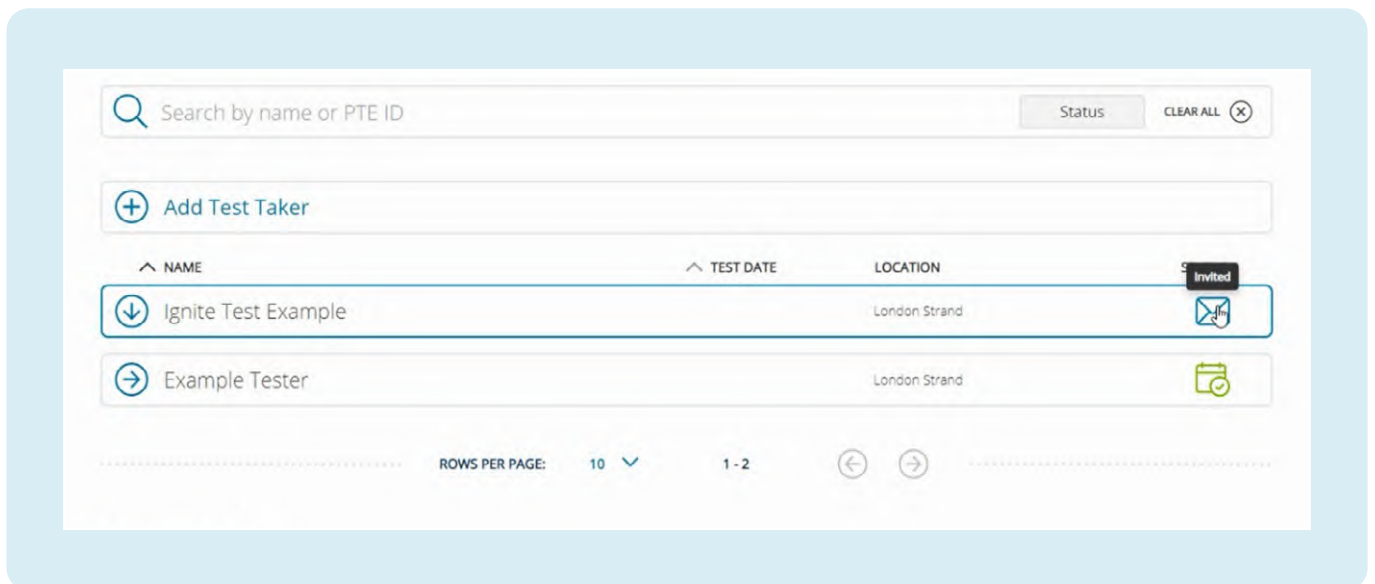
## 5. Associating with Test Takers

The second way to associate with a Test Taker is by associating with their existing account. To do this, you will need to know their PTE ID. You can locate their account from two places.

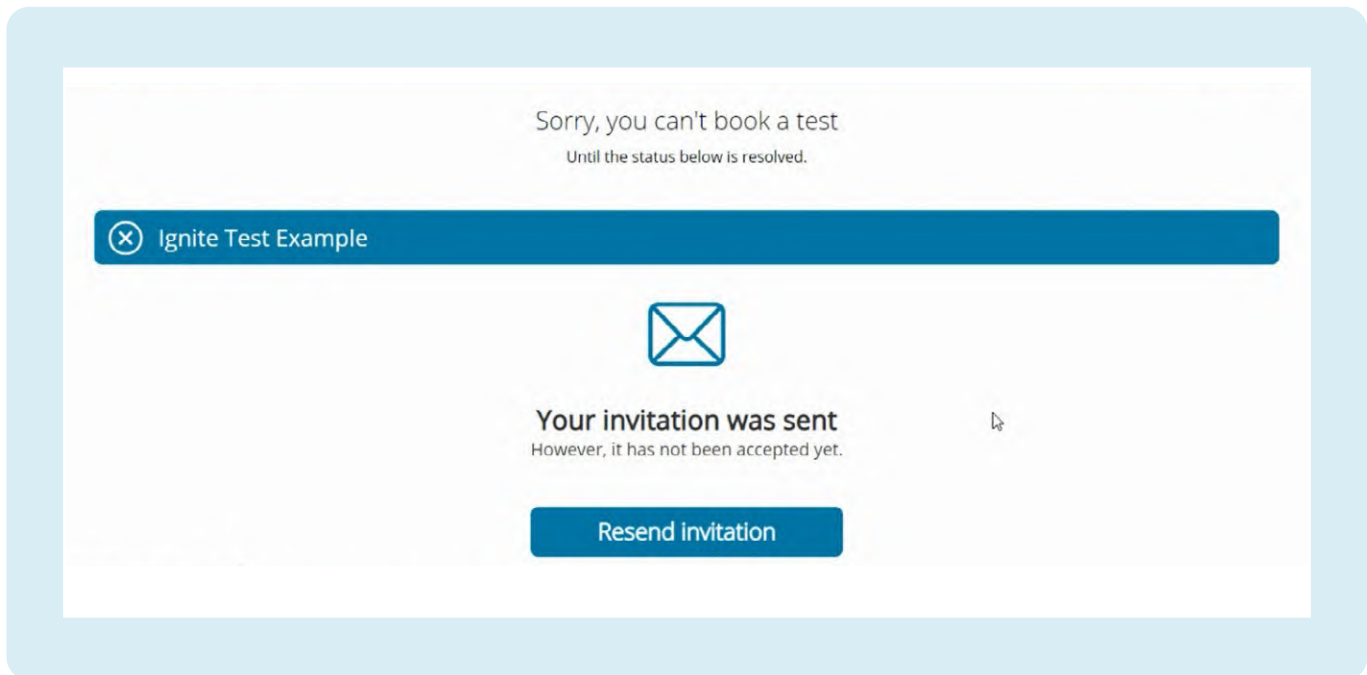
- The first is when you are setting up a new account. There is a field which asks you to enter their PTE ID. If you do and the PTE ID you enter matches with an existing account, you will be asked whether you wish to send an invite to this Test Taker, rather than creating a new account.



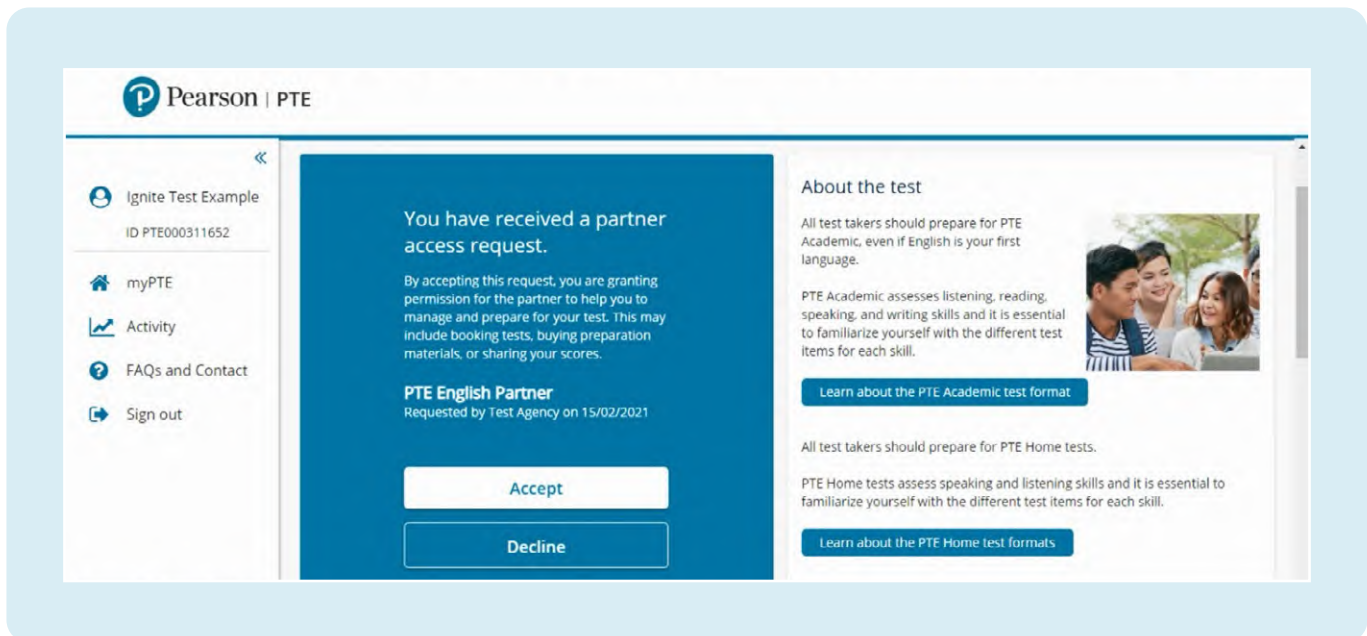
- The second is by searching for their PTE ID from the **'Test Taker'** tab.
- If you search for them using their PTE ID, you can invite them to associate with you. You will see that the Test Taker has been invited via hovering above the icon on the right-hand side.



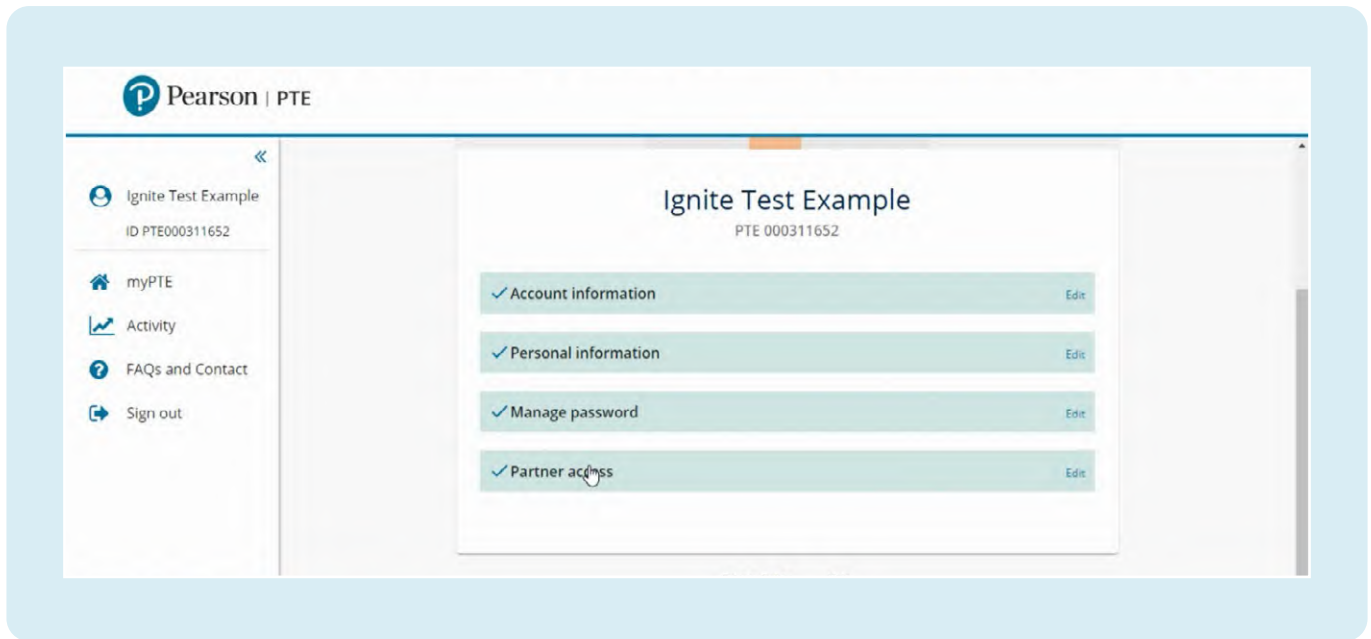
- You will not be able to book a test until the invitation is accepted.



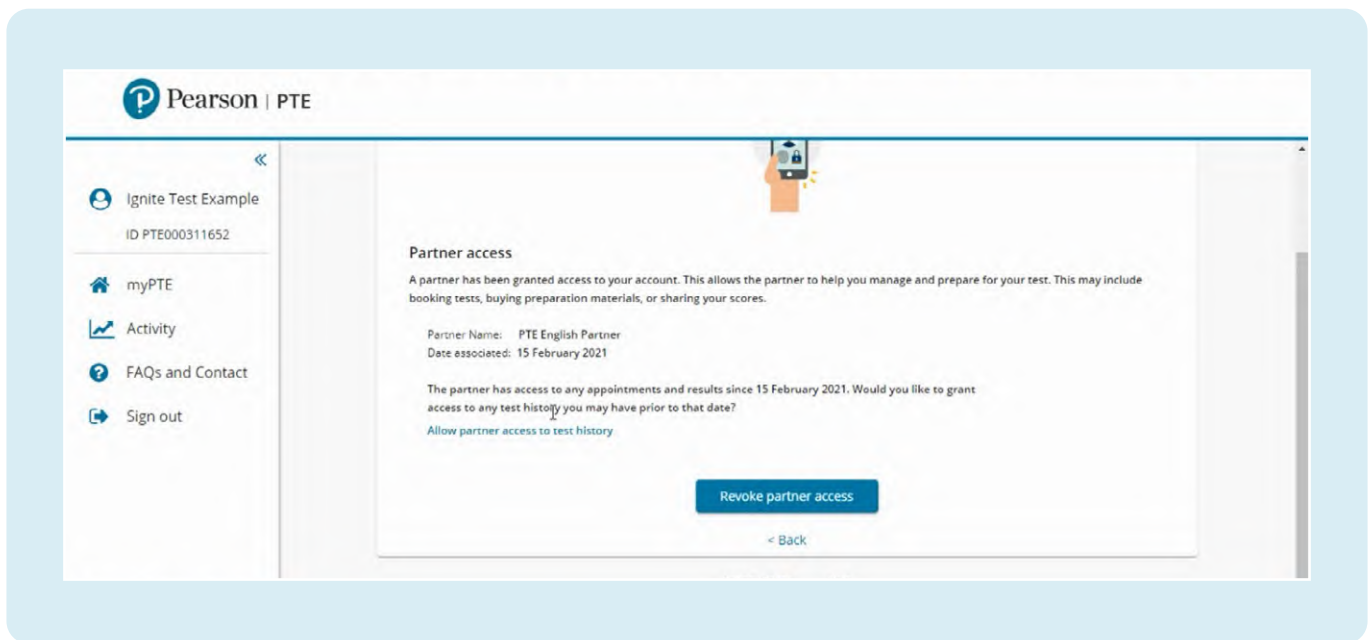
- Beneath is example of what the Test Taker's PTE Homepage will look like after receiving a request. They will have the option to accept or decline.



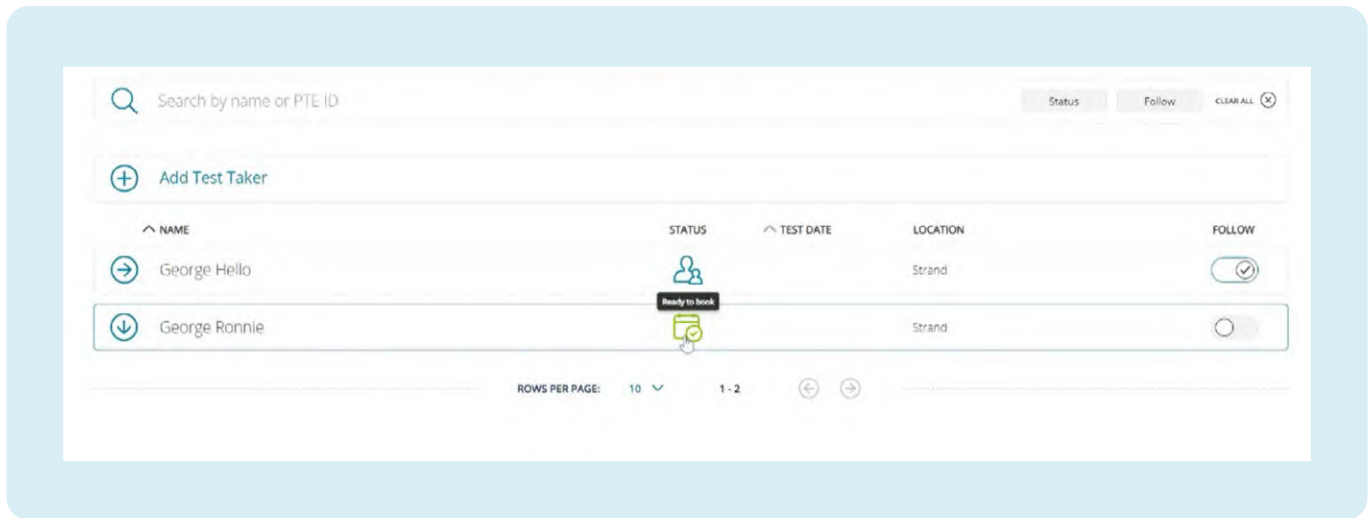
- To enable the Partner to access previous test results, the Test Taker will need to approve this in their account. From their settings they will need to edit Partner access.



- From here they will have the choice to allow Partner access to test history or to revoke Partner access.

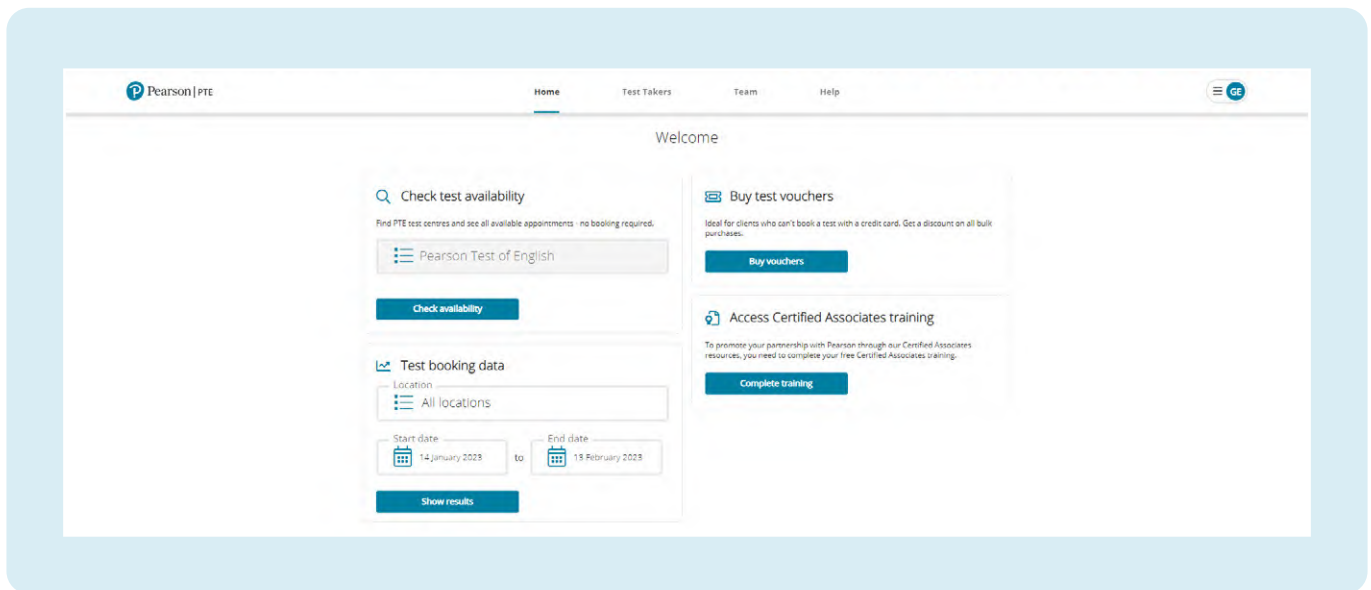


- Once the Test Taker has accepted this request; it will be reflected in the Partner's homepage by the **'Ready to book'** icon.



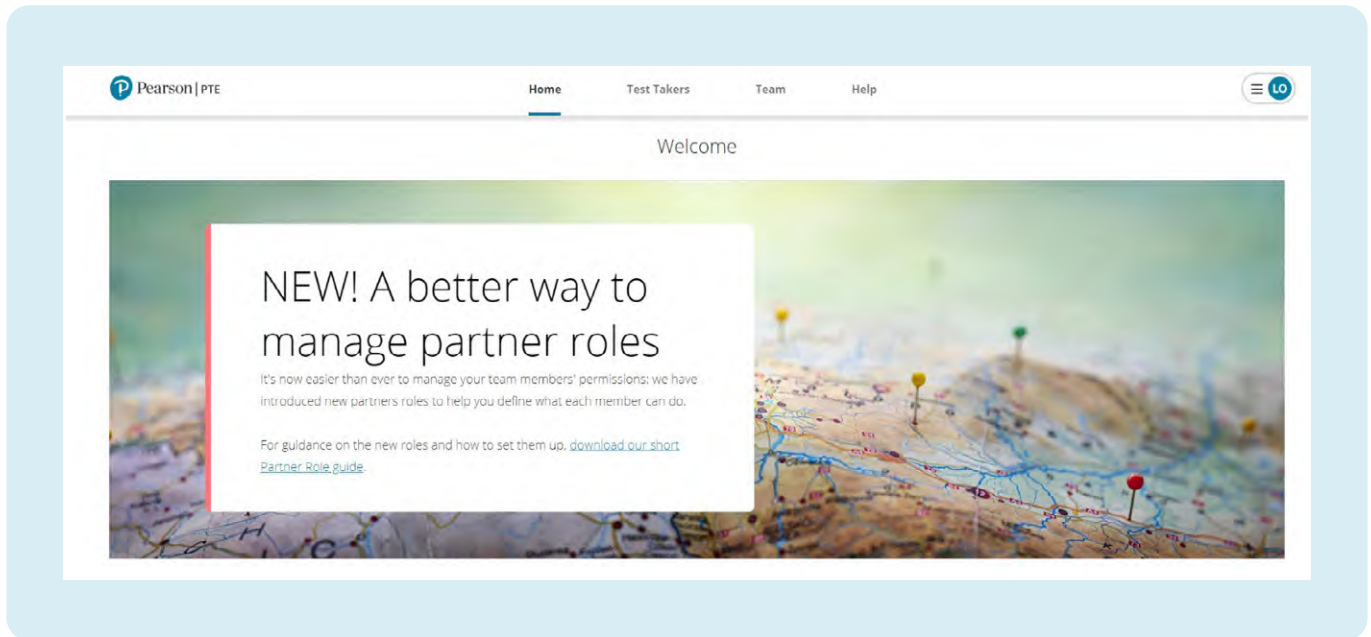
## 2. Dashboard (Homepage)

- There is a dashboard titled **'Home'** which users land on after they have set up their account.



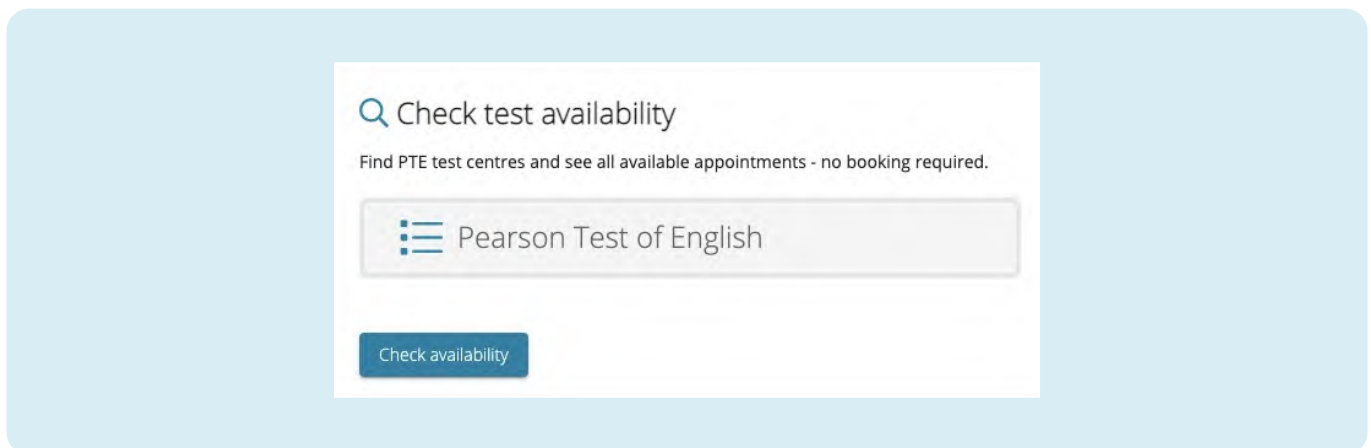


- Occasionally, dashboard banners will appear. These will be used to broadcast essential information. Most often, this will broadcast any update which might affect upcoming appointments, and to explain new features on PTE Partners.



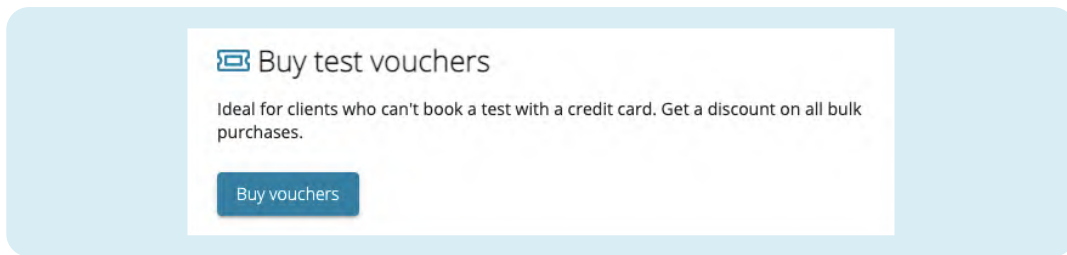
## Test Availability Search

- The first card on the dashboard allows for Partner Administrators and Team Members to check for appointment availability at a specific Test Center. Once a test is chosen, the user can select the 'Check availability' button. You can then search for up-to-date test availability across all Test Centers, and once a Test Center is selected, view appointment availability there.



## Purchase vouchers

- The **'Buy test vouchers'** dashboard card allows Partner Administrators and Team Members quick access to purchase test vouchers.



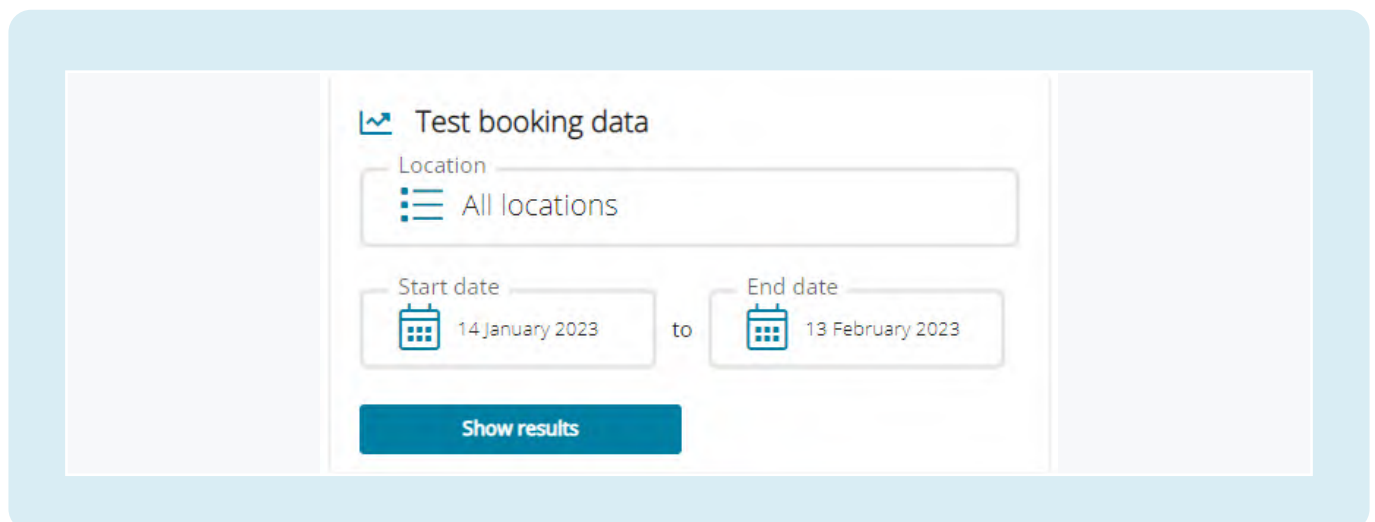
## Access Certified Associates digital training

- Selecting the **'Complete training'** button will navigate Partner Administrators and Team Members to the PTE Academic Certified Associates Program page. From here they can begin to access or complete the Certified Associates training program.



## Partner booking data

- Partner Administrator and Location Administrator can now view associated Test Takers' booking data.
- Partner Administrator can view data for any and all Locations.
- Location Administrator can view data for any and all of their assigned Locations.
- Users can set the date parameter up to a maximum of 30 days apart.
- Team Members cannot view this functionality.



## 6. PTE Referral Link

### What is the PTE Referral Link?

Every Partner will be able to access a unique URL link or QR code from their account, which they can send to Test Takers to refer them to PTE. The referral will be completed based on the following criteria:

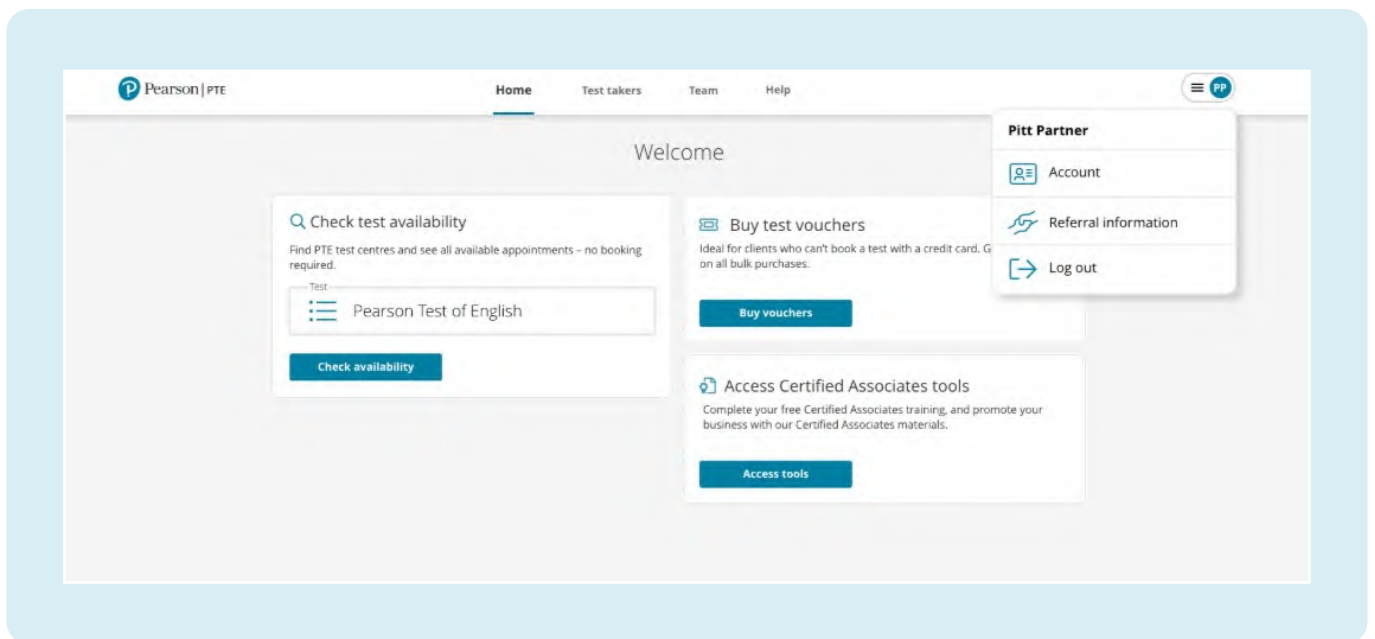
- the Test Taker is new and does not have an existing PTE account
- the Test Taker books and sits a test
- the Test Taker does not associate with another Partner before booking

Partners can use this new 'PTE Referral Link' alongside the existing ways of booking Test Takers.

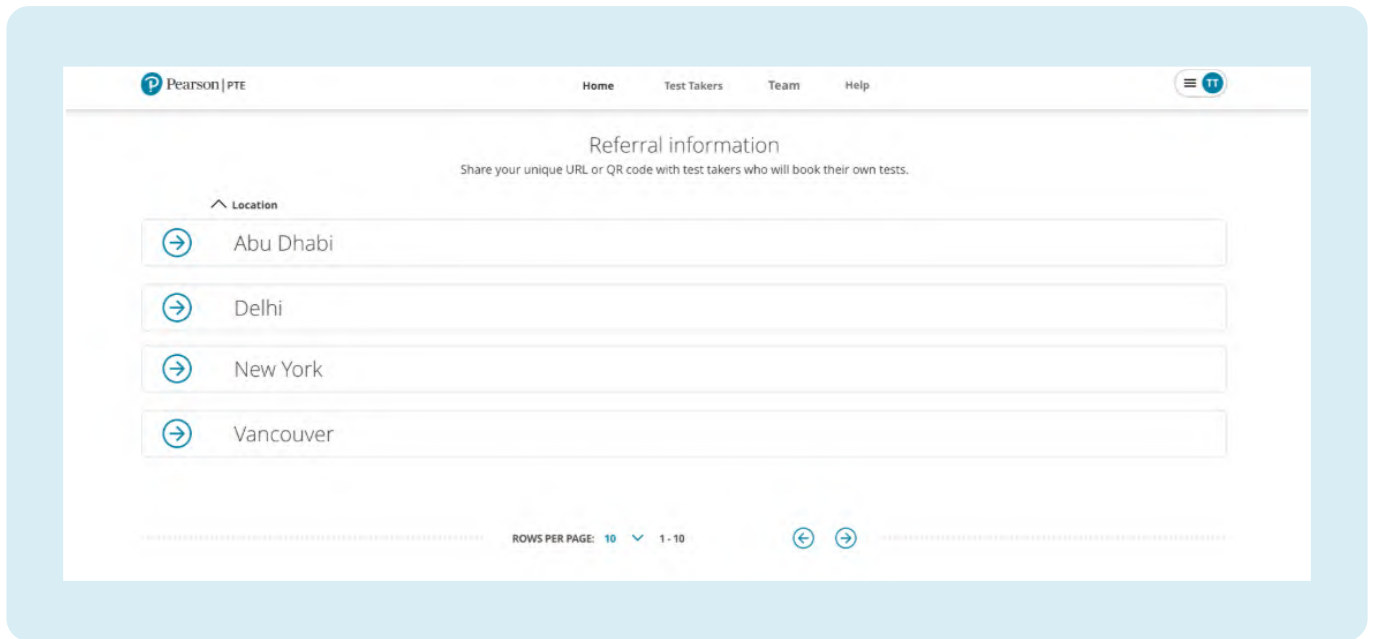
Please refer to your local Pearson Representative to see how the Referral Link fits into any existing incentive schemes in place in your region.

### How it works:

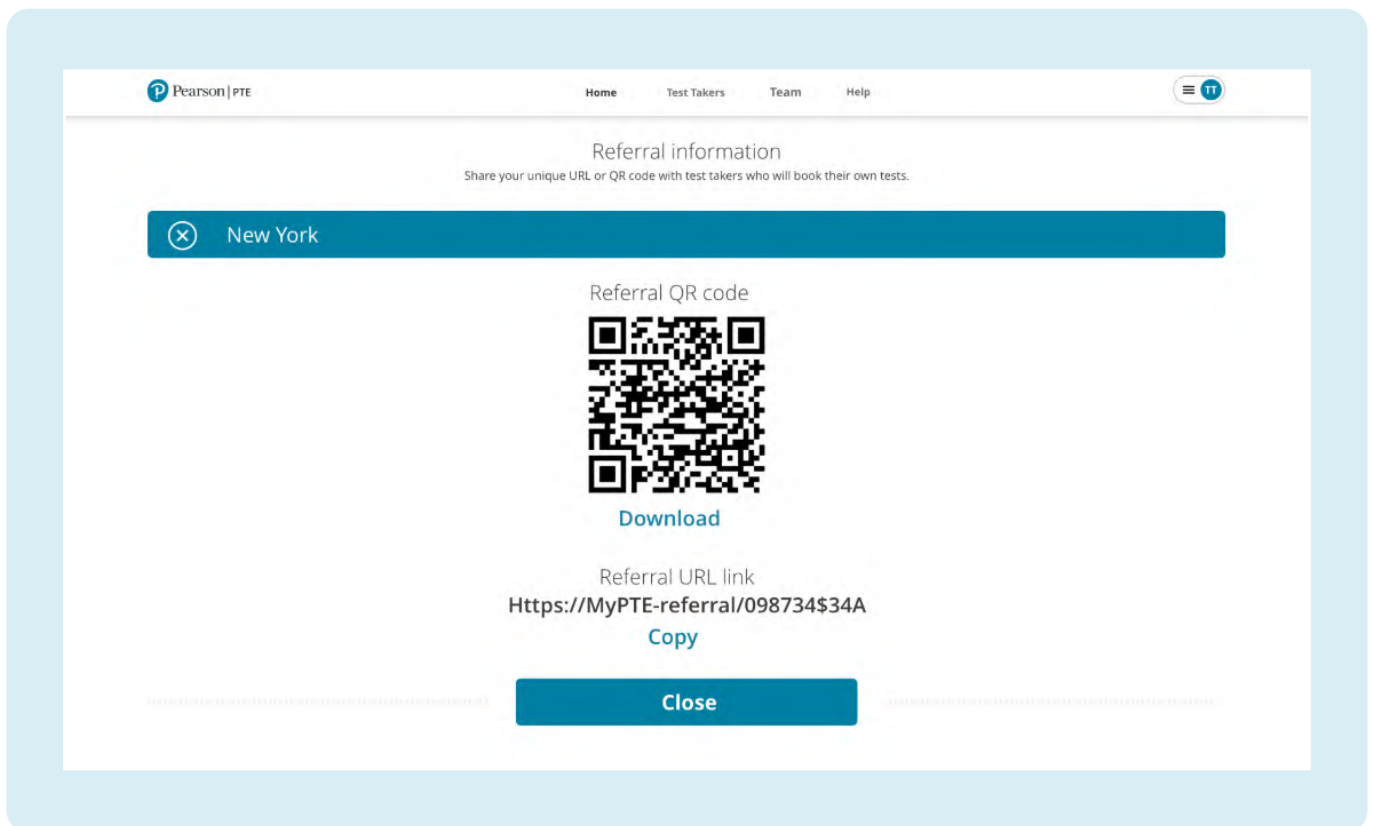
- Click on the menu at the top right of your account to see the new '**Referral information**' option.



Team Members and Location Administrators will see locations they are associated with, whereas Partner Administrators will be able to see all locations of their Partner.



- By clicking a location, you will access the QR code and URL link for that location

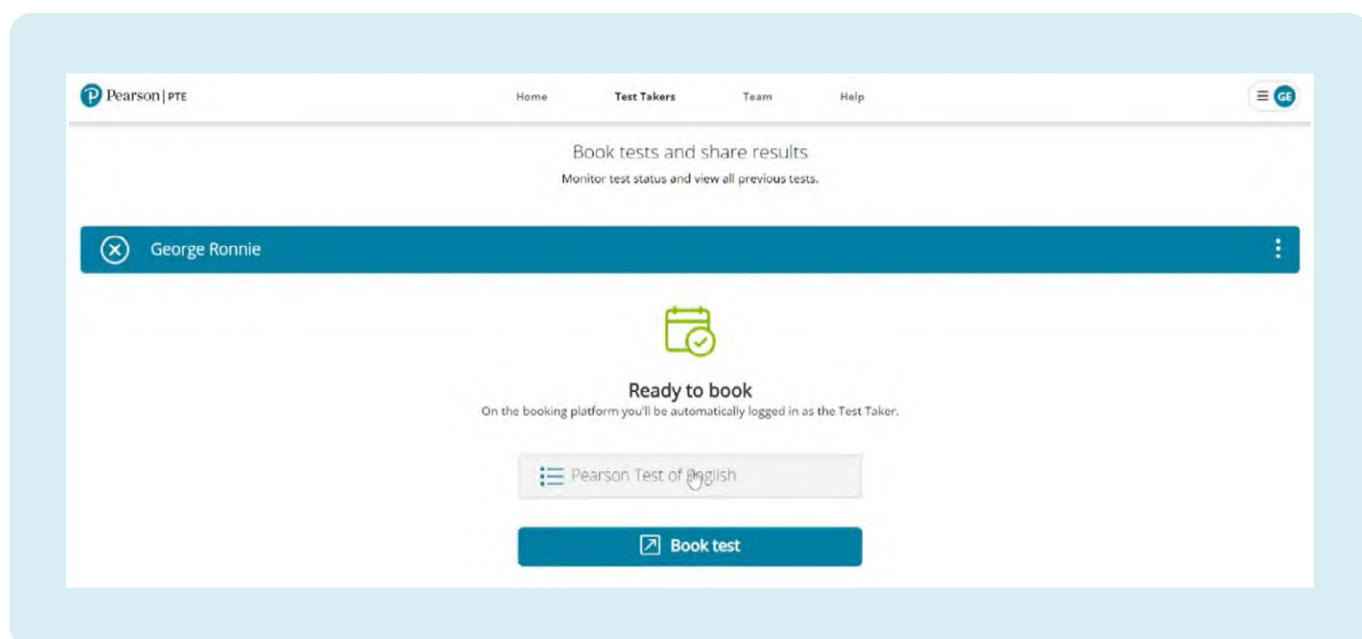


The QR code or link can be shared with new clients. When clicked or scanned, the client will be taken to the PTE Academic website sign up page and prompted to create their own myPTE account. After the client schedules and sits their exam, the booking will be marked as a Referral Link booking linked to your organization.

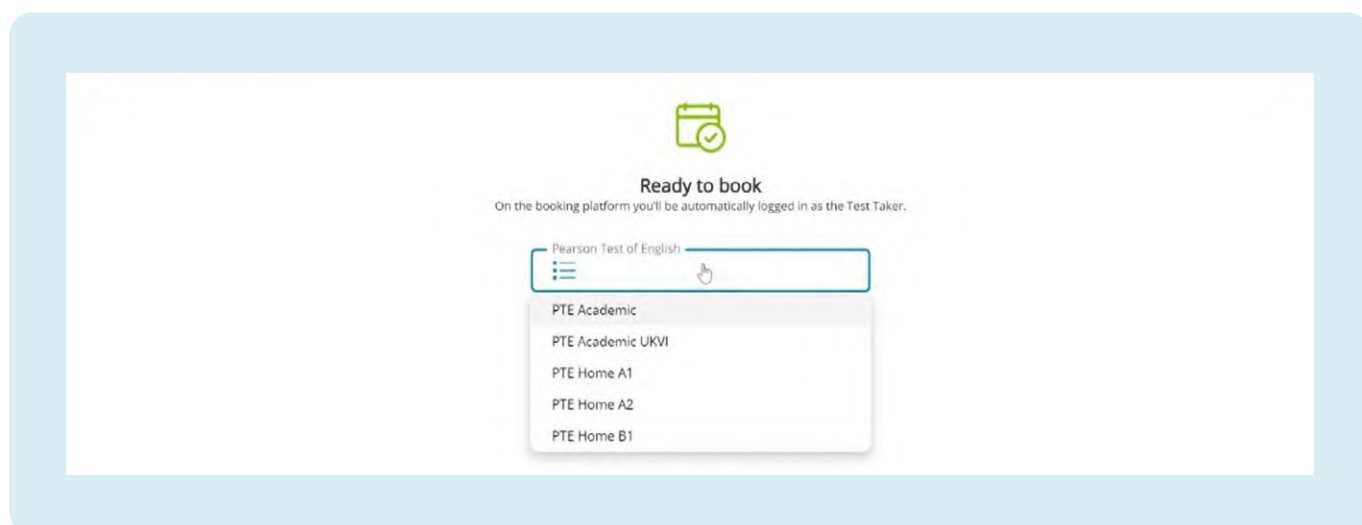
You can create one unique PTE Referral Link to use across your entire organization, or create individual links for each location your organization operates in.

## 7. Book a test

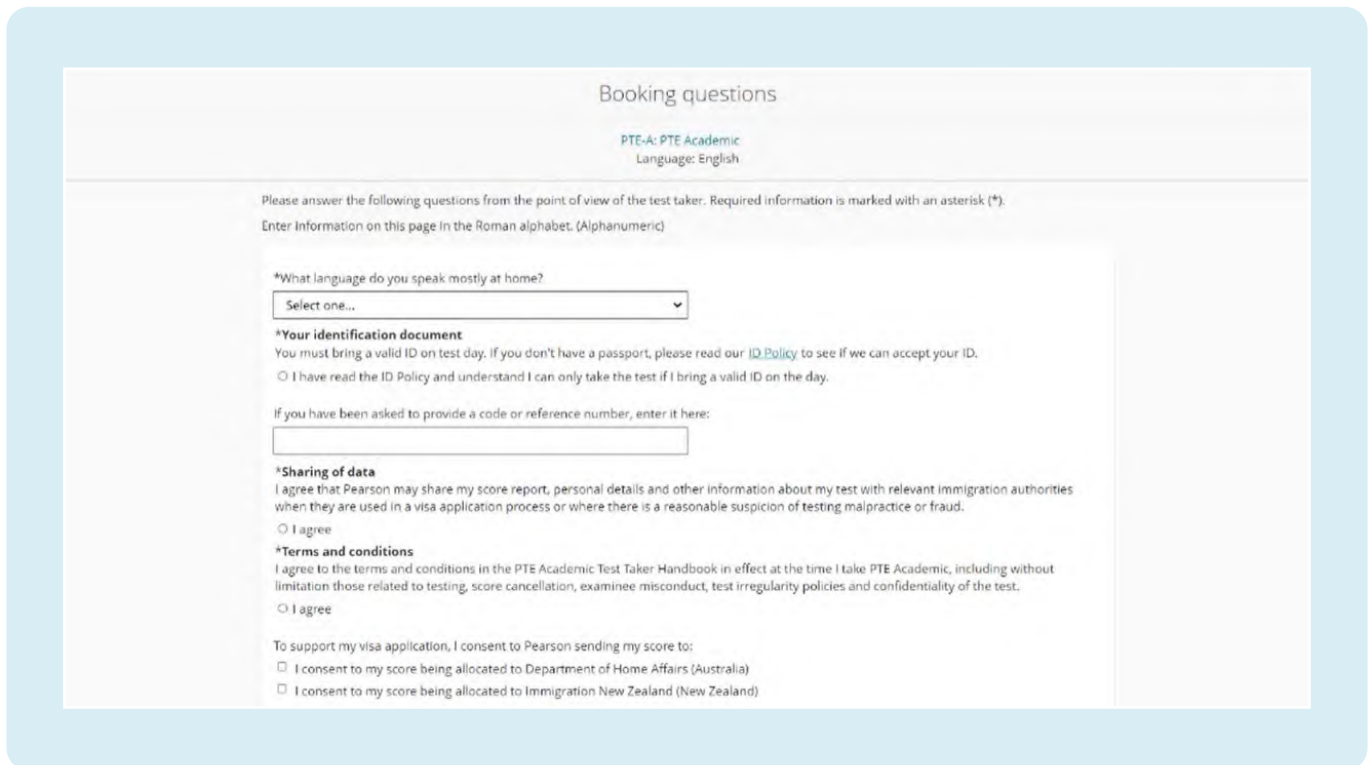
- To book a test for a Test Taker, head to the Test Taker grid by clicking the **'Test Takers'** tab.
- Click **'Pearson Test of English'** to view the portfolio of tests.



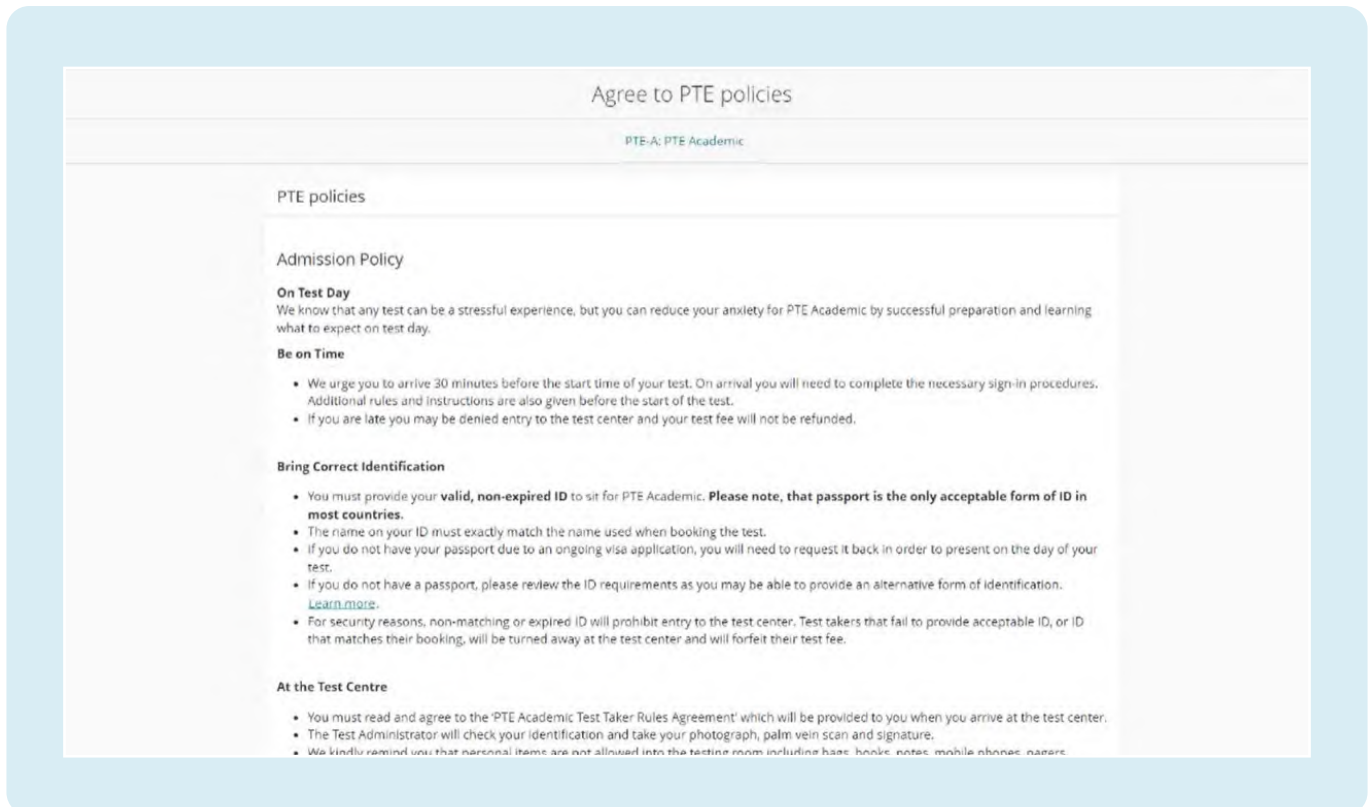
- Choose the suitable test



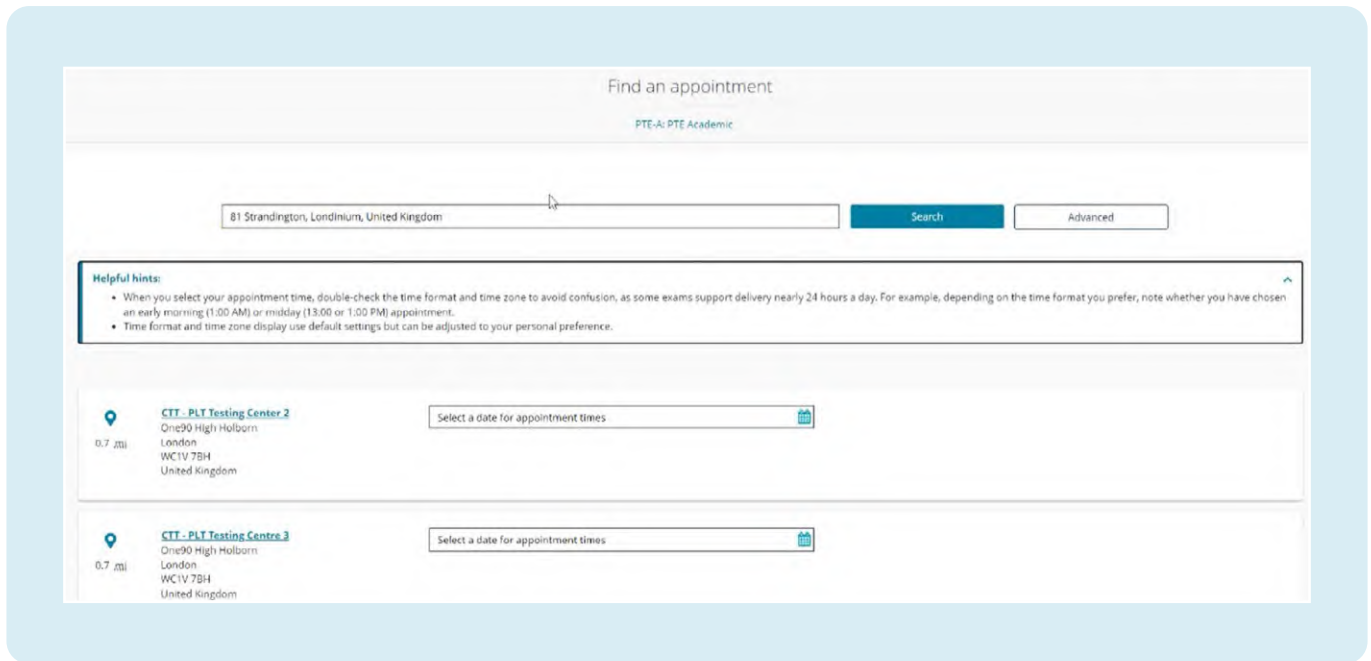
- Complete booking questions. Dependent on the test, the questions may differ slightly.



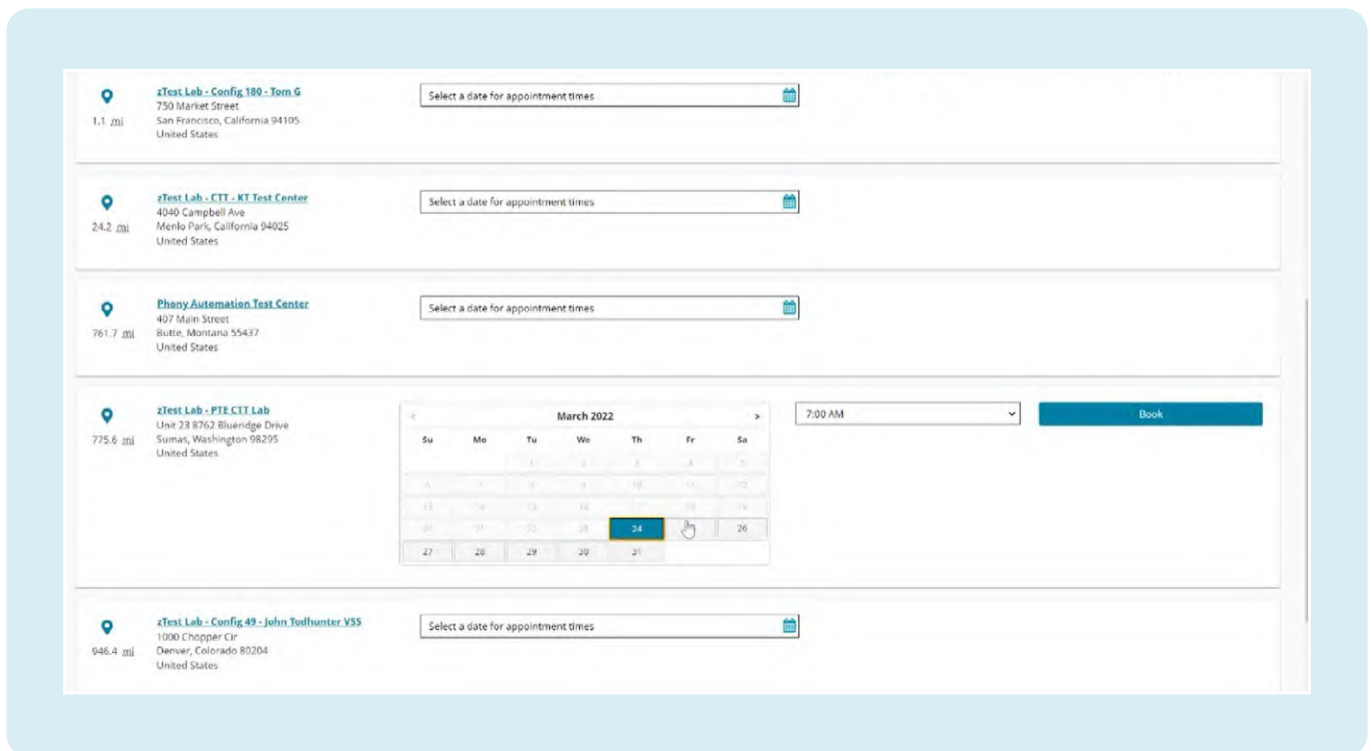
- Read and agree to PTE's policies on behalf of the Test Taker.



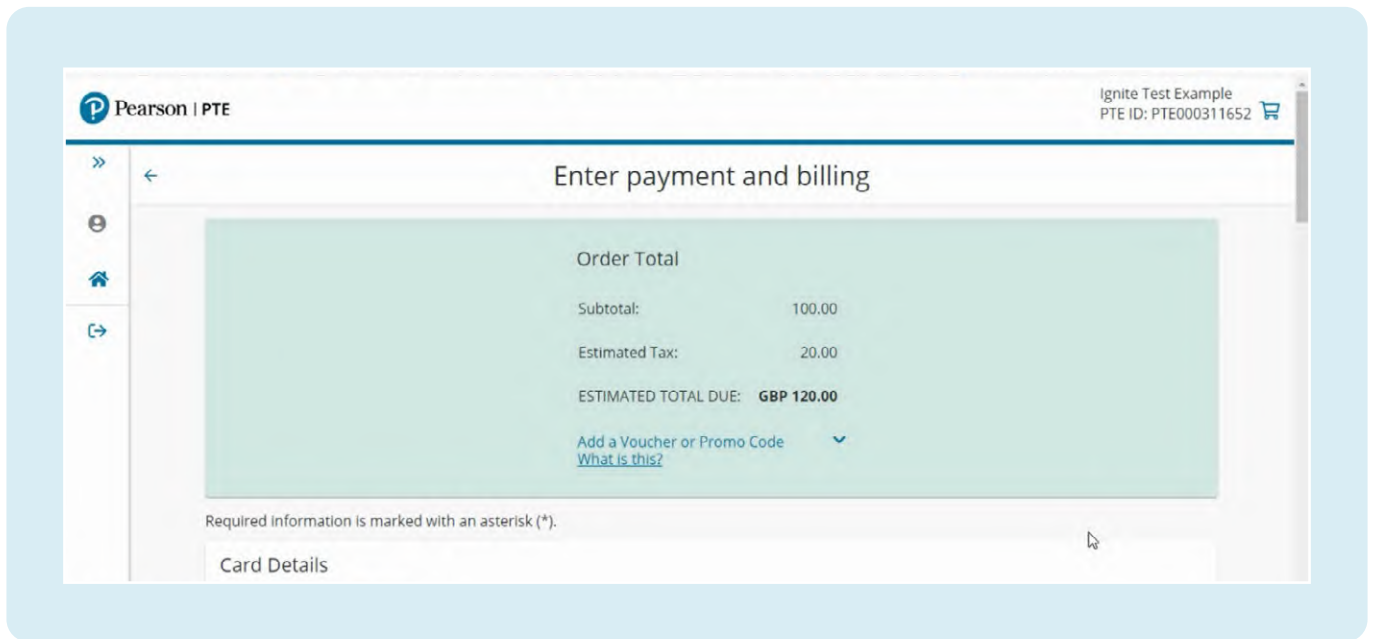
- Find an appointment. To start, set your location. If you have allowed Pearson to access your location, this will automatically be loaded.



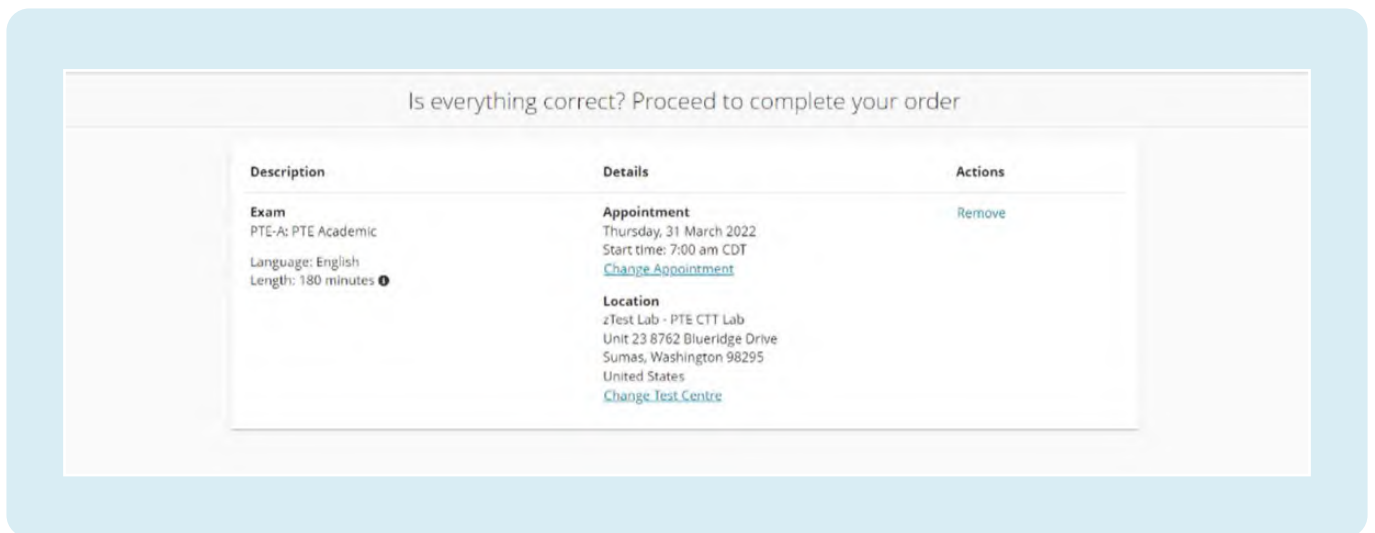
- Choose a suitable test (location, date, time) and click book.



- Enter payment and billing information.



- Review booking before completing a payment and submitting your order.

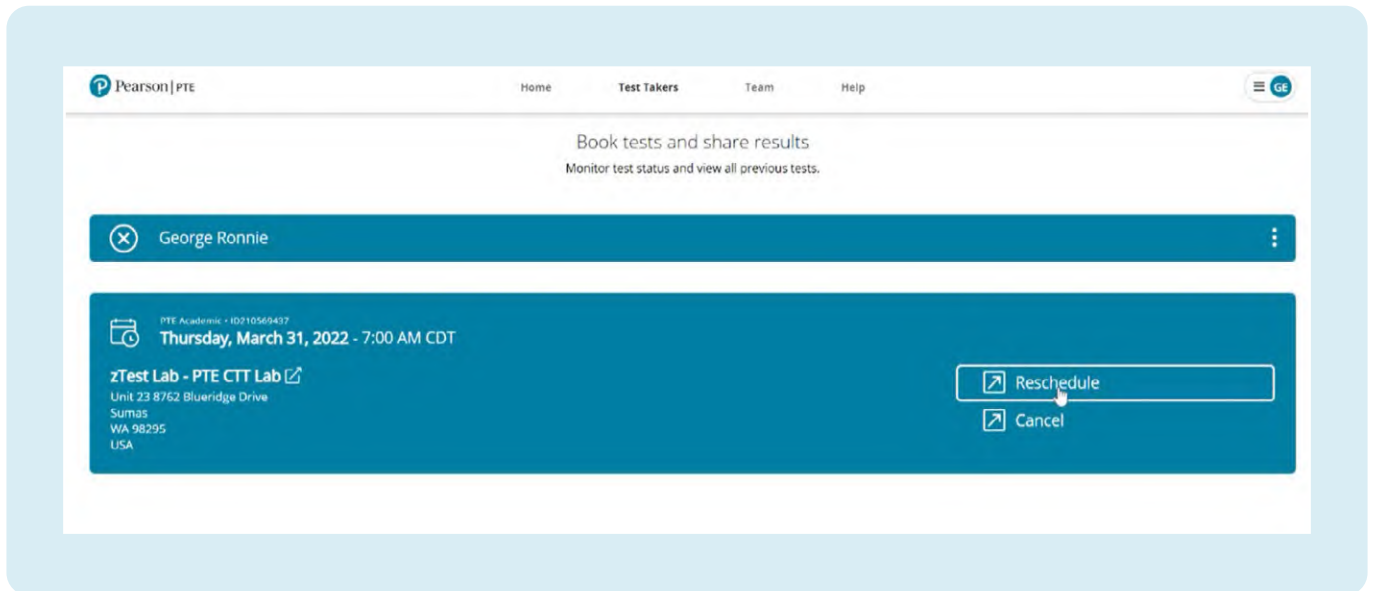


- **Order completed!** Click **'Return to myPTE'** to return to the Homepage.

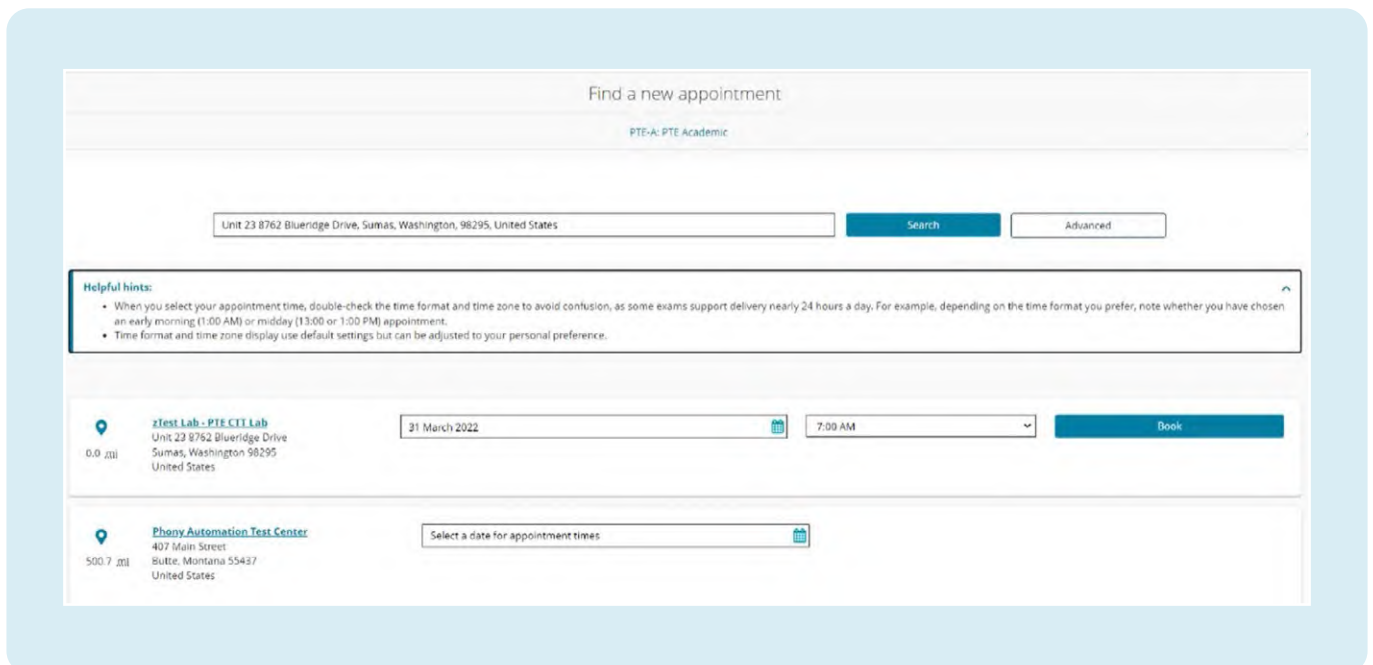


## 8. Manage a booking

- From the Test Taker grid, you can manage existing bookings on behalf of the Test Taker.
- You can view bookings by clicking on the Test Takers with the upcoming test icon. This will show you the test details, and offers you the option to either cancel or reschedule the test.

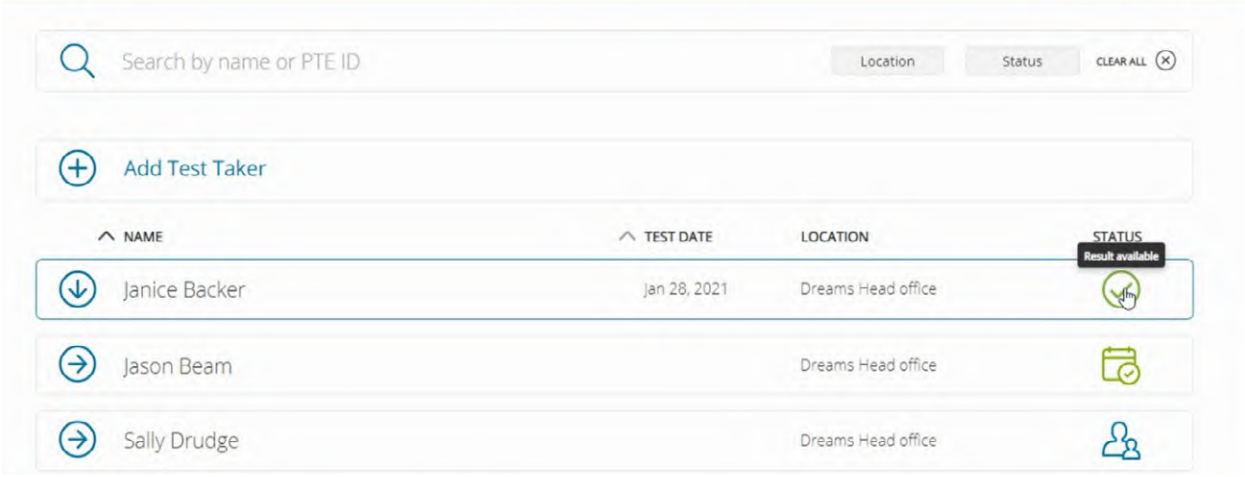


- Click '**Cancel**' to cancel the booking.
- To reschedule the test, click '**Reschedule**'. This will take you back into the booking process.



## 9. Viewing and sharing results

- From the PTE Partners homepage, you can view whether a Test Taker's result is available by the icon next to their name. If there is a green tick, this means that their result is available. Hovering above the icon will state this.

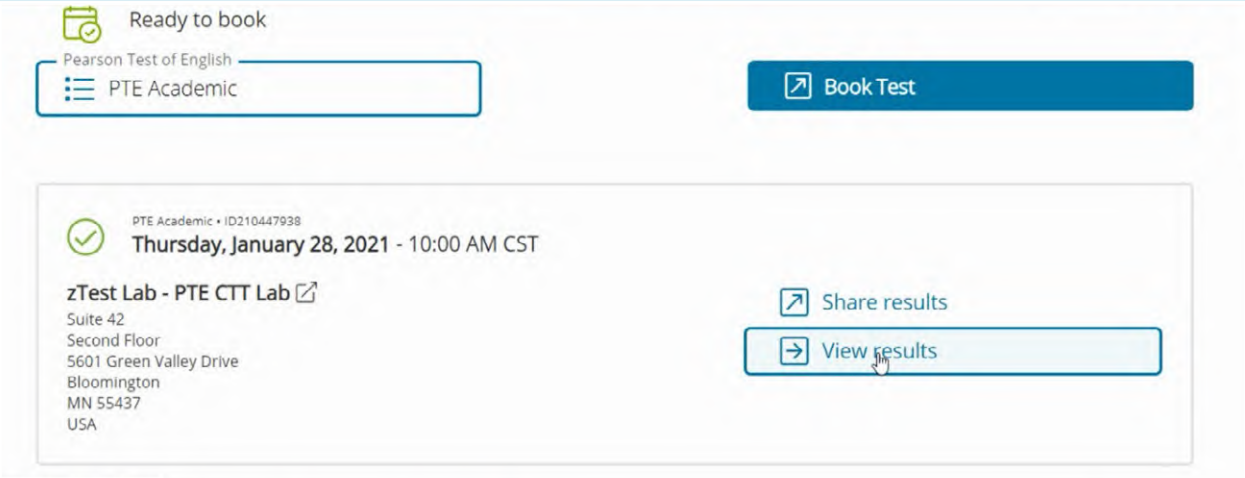


Search by name or PTE ID Location Status CLEAR ALL ✕

+ Add Test Taker

NAME	TEST DATE	LOCATION	STATUS
<span>↓</span> Janice Backer	Jan 28, 2021	Dreams Head office	<span>✓</span> Result available
<span>→</span> Jason Beam		Dreams Head office	<span>📅</span>
<span>→</span> Sally Drudge		Dreams Head office	<span>👤</span>

- Scrolling down, you have the option of viewing and sharing results.



📅 Ready to book

Pearson Test of English →

☰ PTE Academic 📄 Book Test

✓ PTE Academic • ID210447938

**Thursday, January 28, 2021 - 10:00 AM CST**

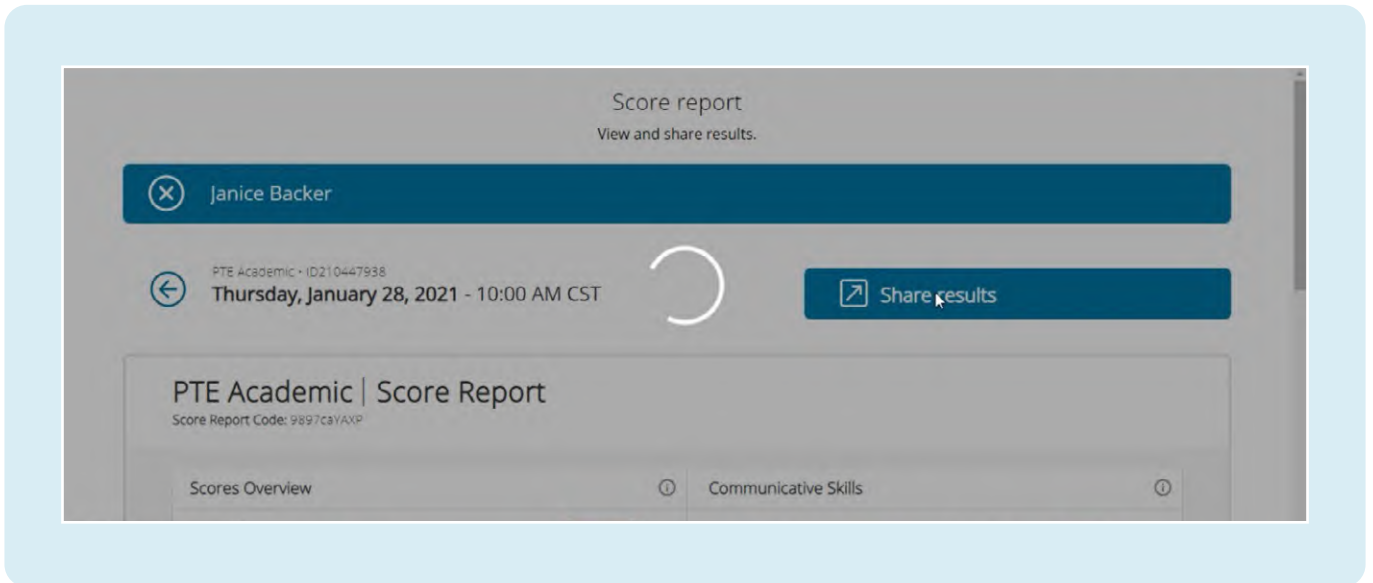
**zTest Lab - PTE CTT Lab** 📍

Suite 42  
Second Floor  
5601 Green Valley Drive  
Bloomington  
MN 55437  
USA

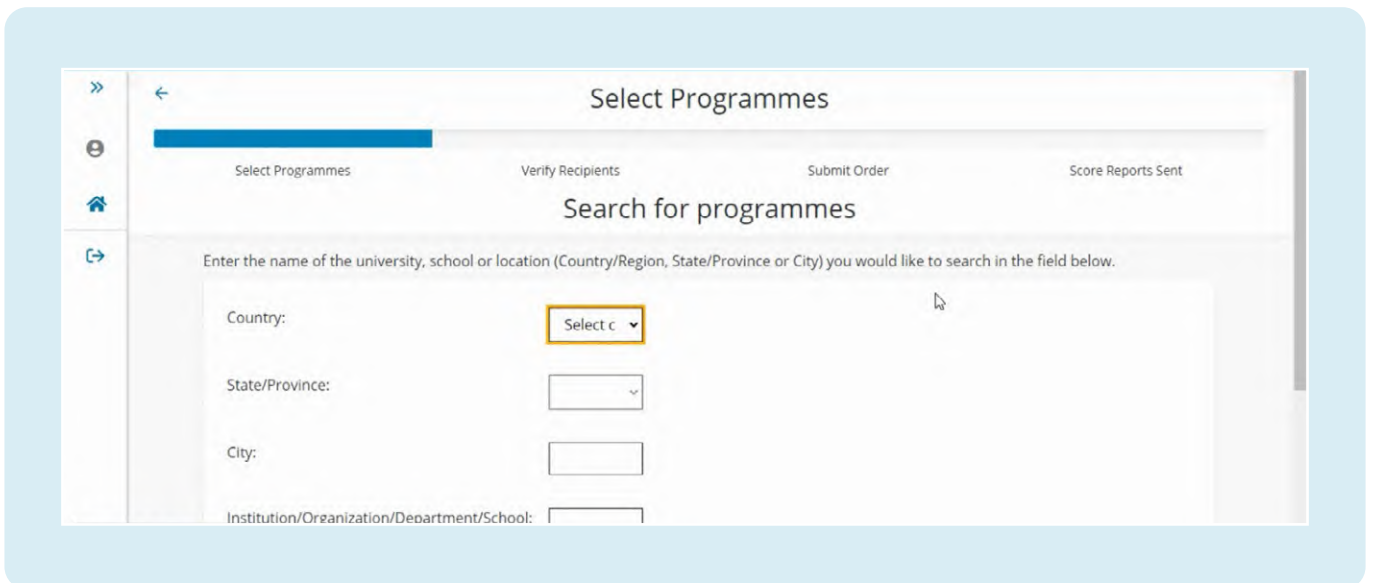
📄 Share results

→ View results

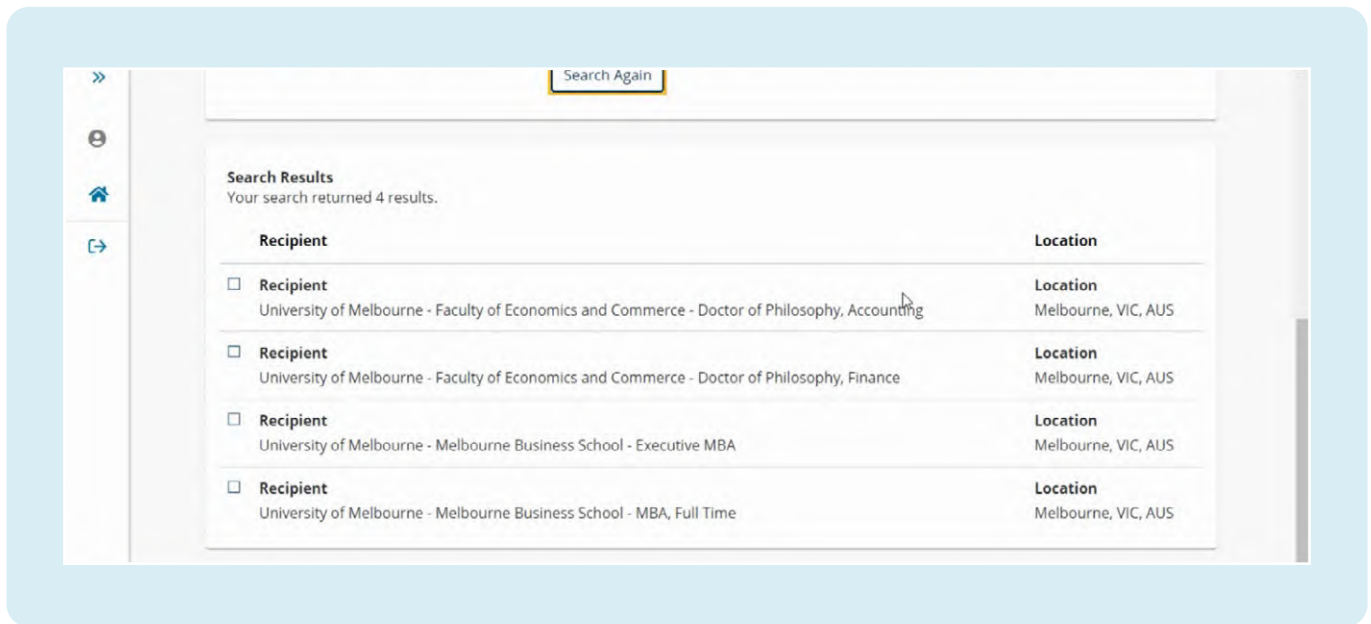
- By clicking '**View results**', the Score Report will load.



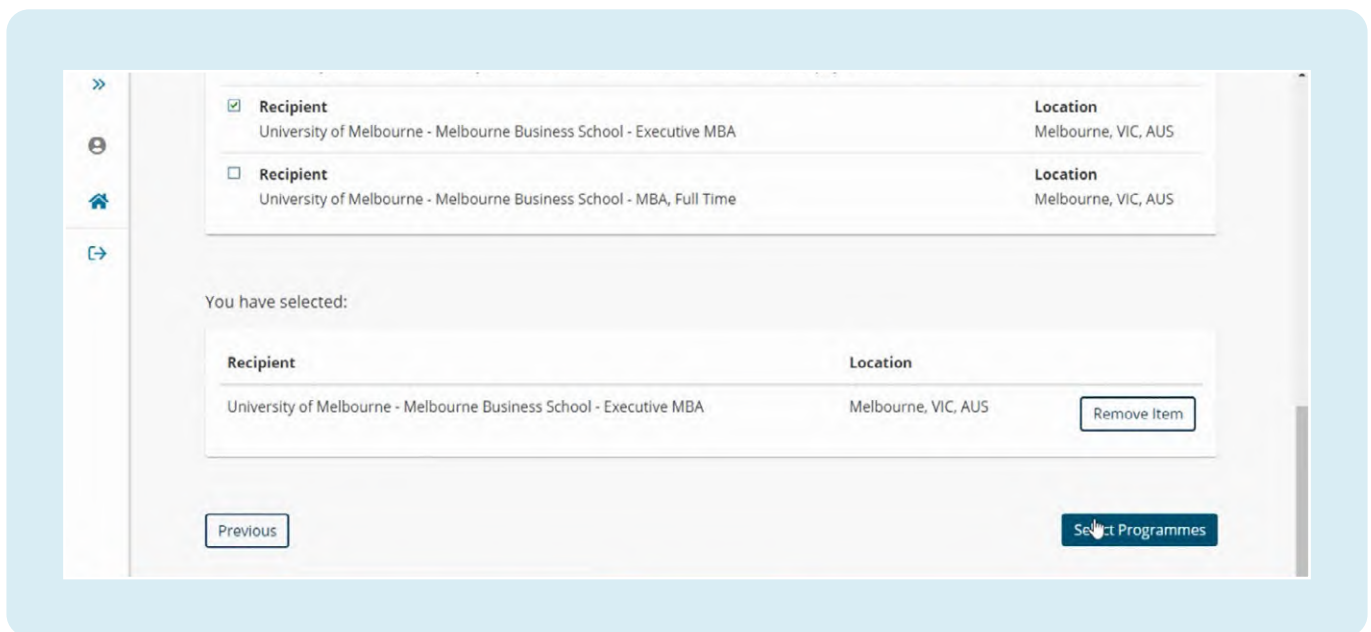
- You can also view the Score Report as a PDF.
- If you wish to share the Score Report with an organization, click '**Share results**'.
- Then search for an organization, department, or program.



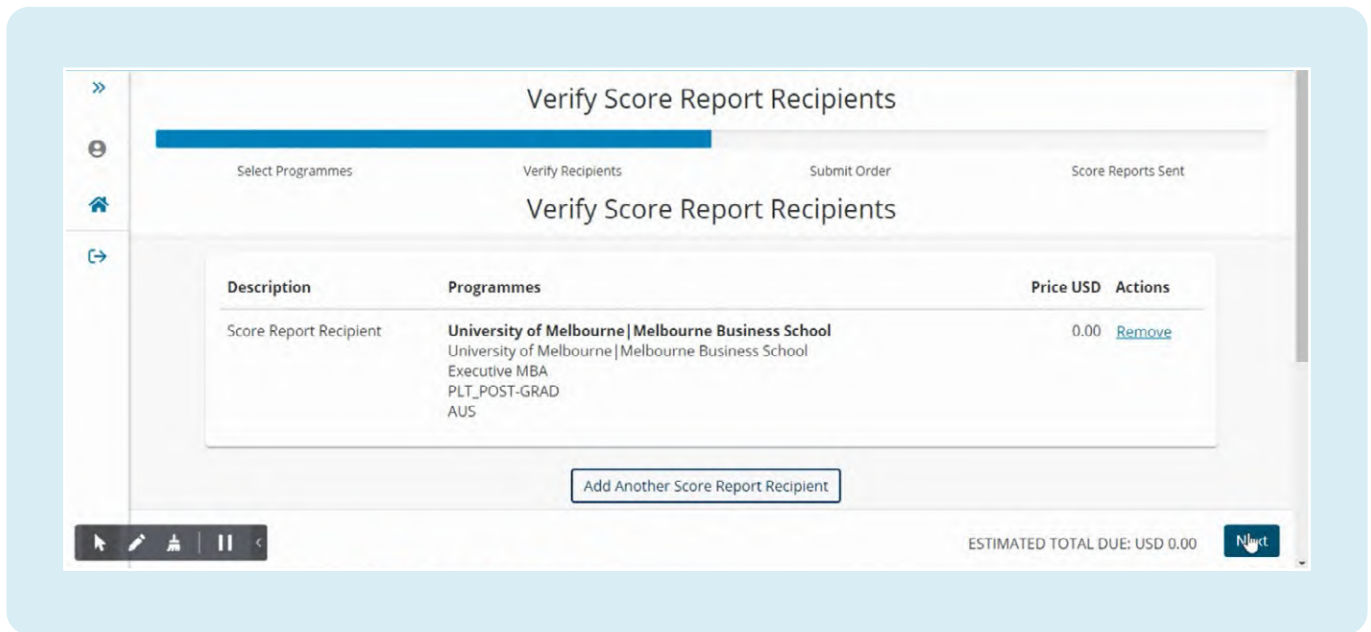
- View search results.



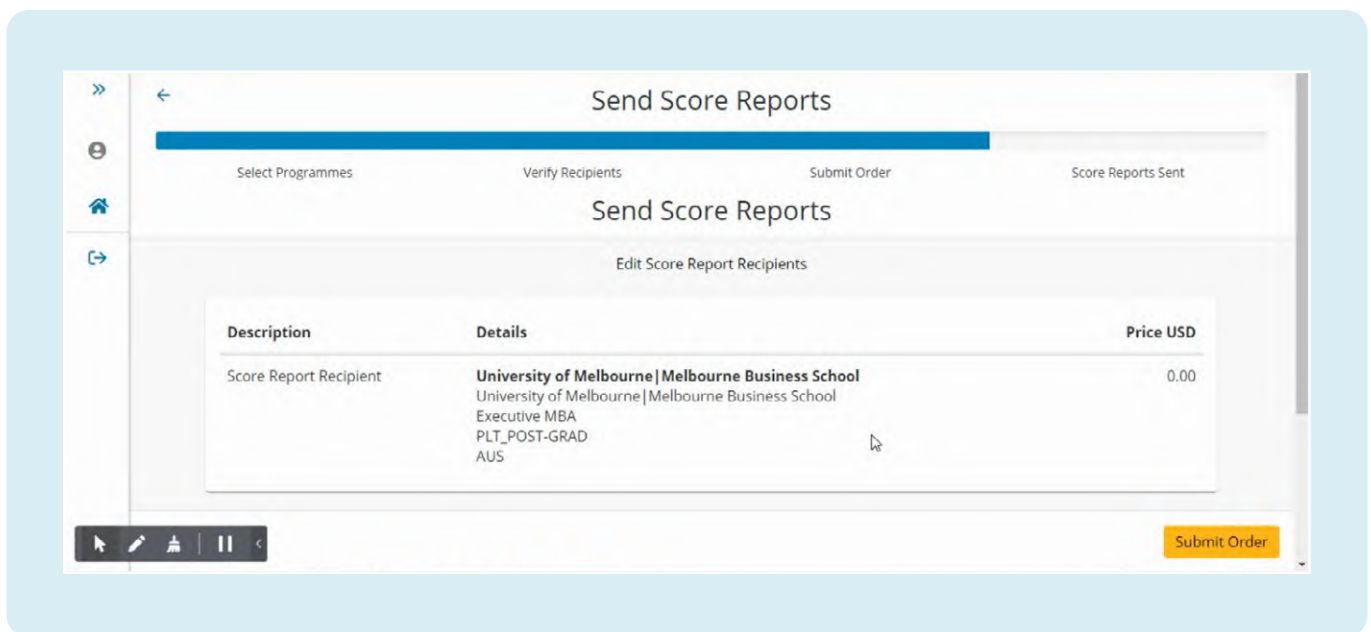
- Select a program.



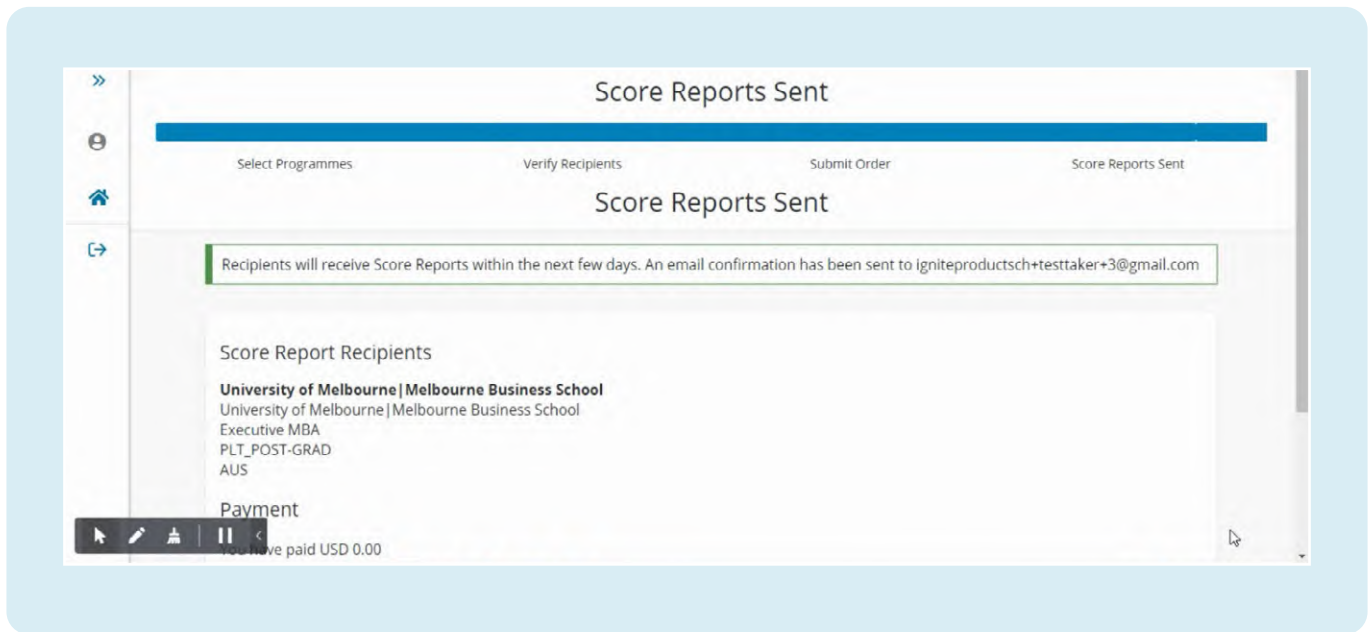
- Either add another Score Report recipient or click **'Next'**.



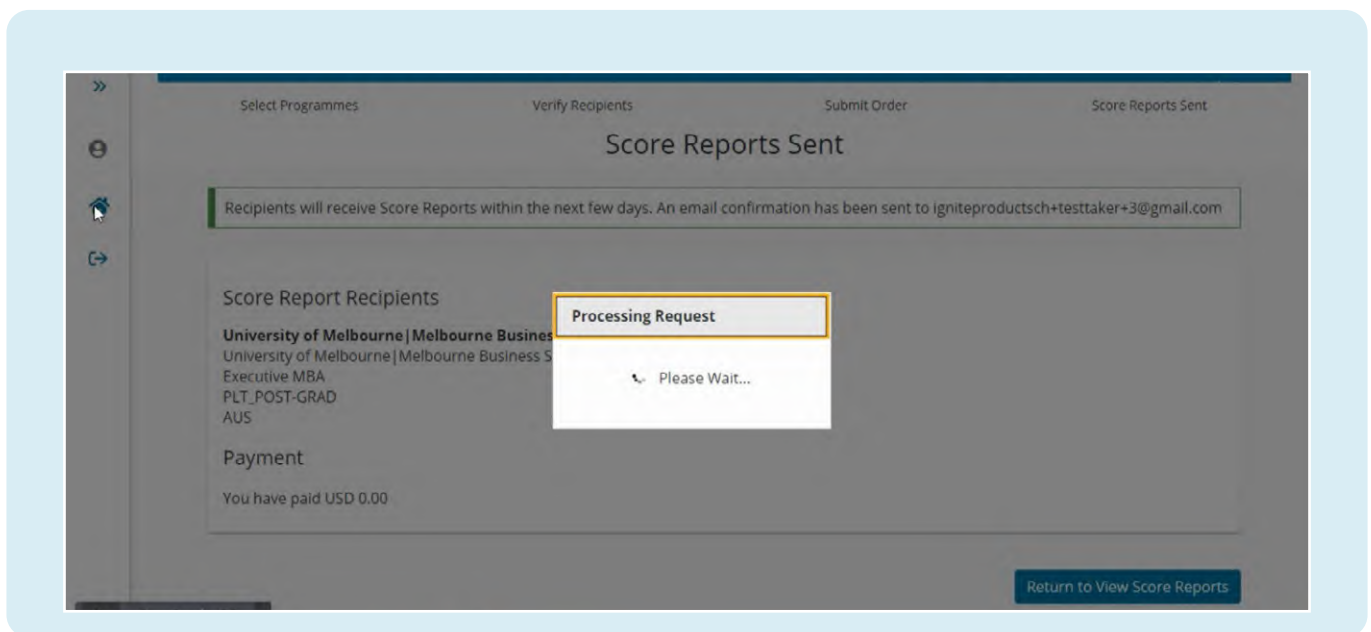
- Submit order.



- Receive confirmation that the Score Report has been sent.



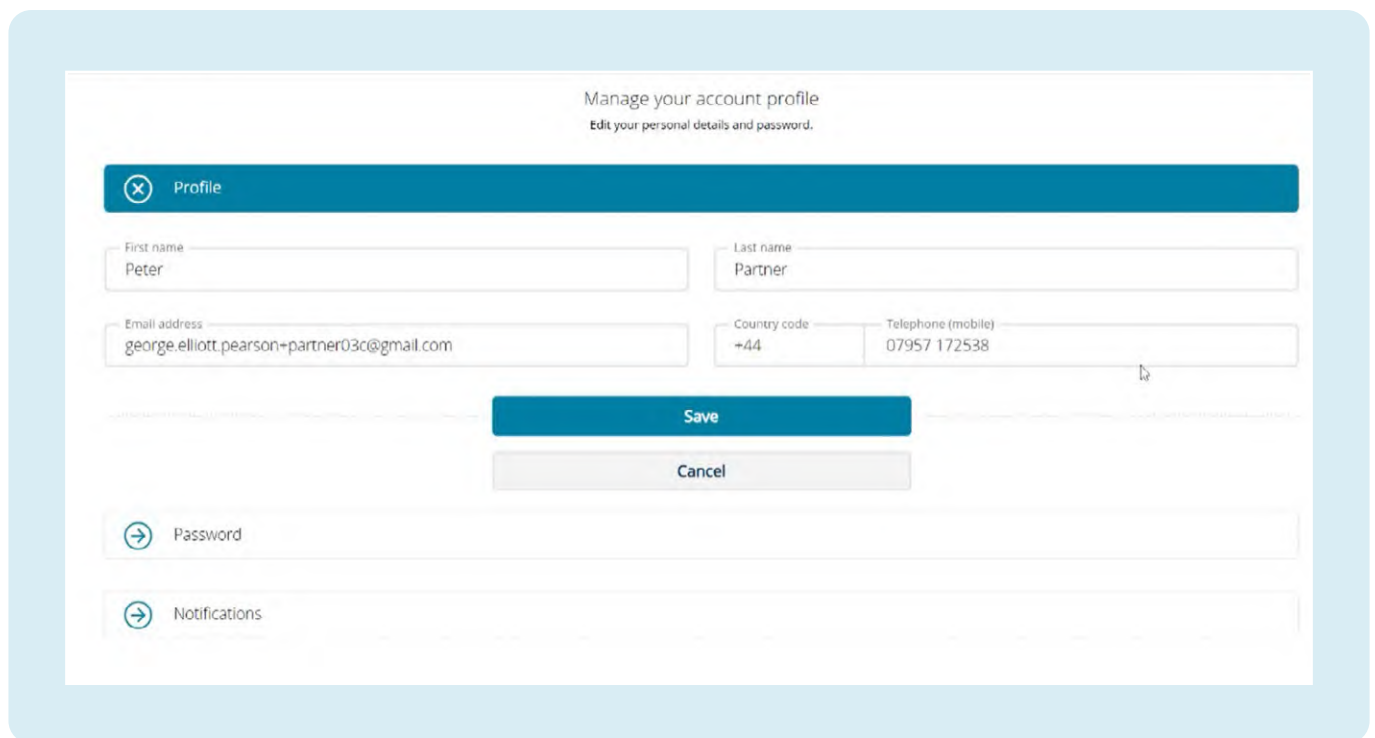
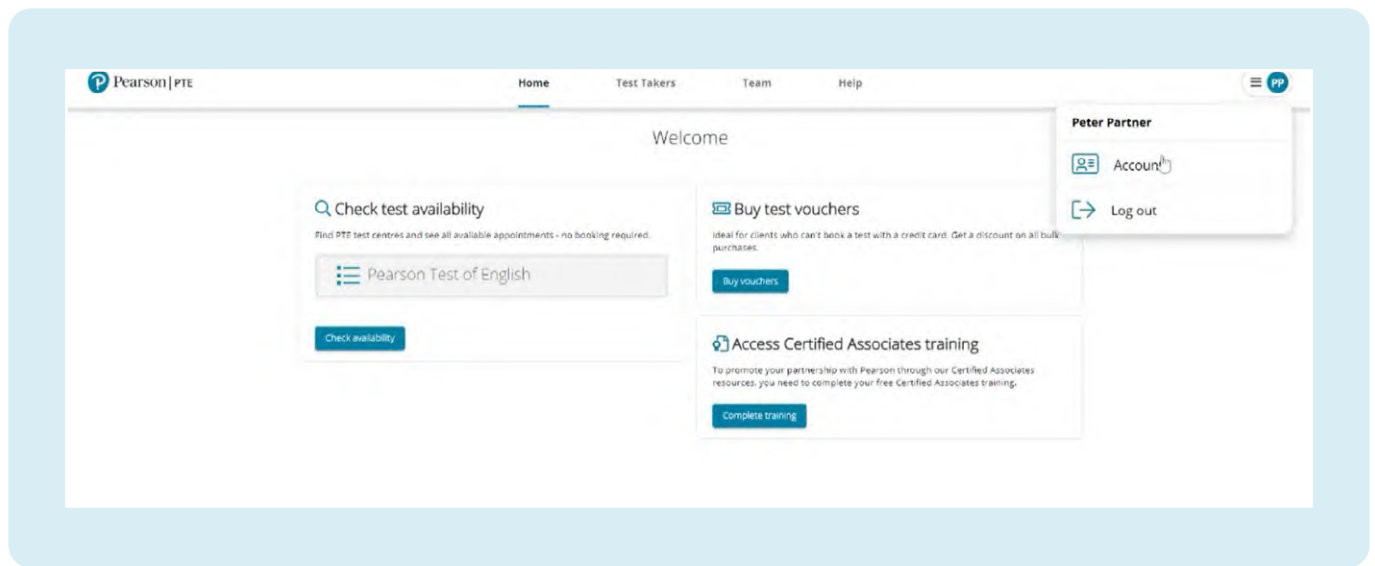
- Return to View Score Report.



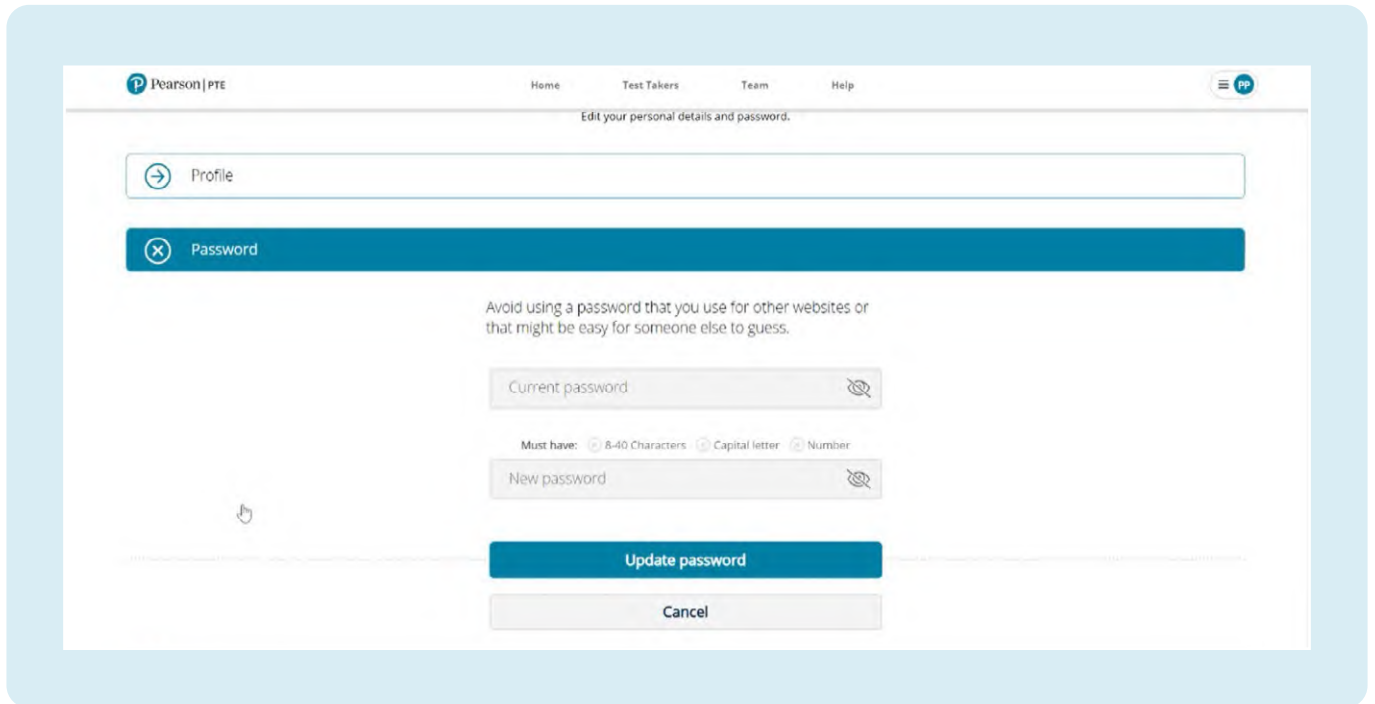
- Land again on Score Report.

## 10. Manage your account profile

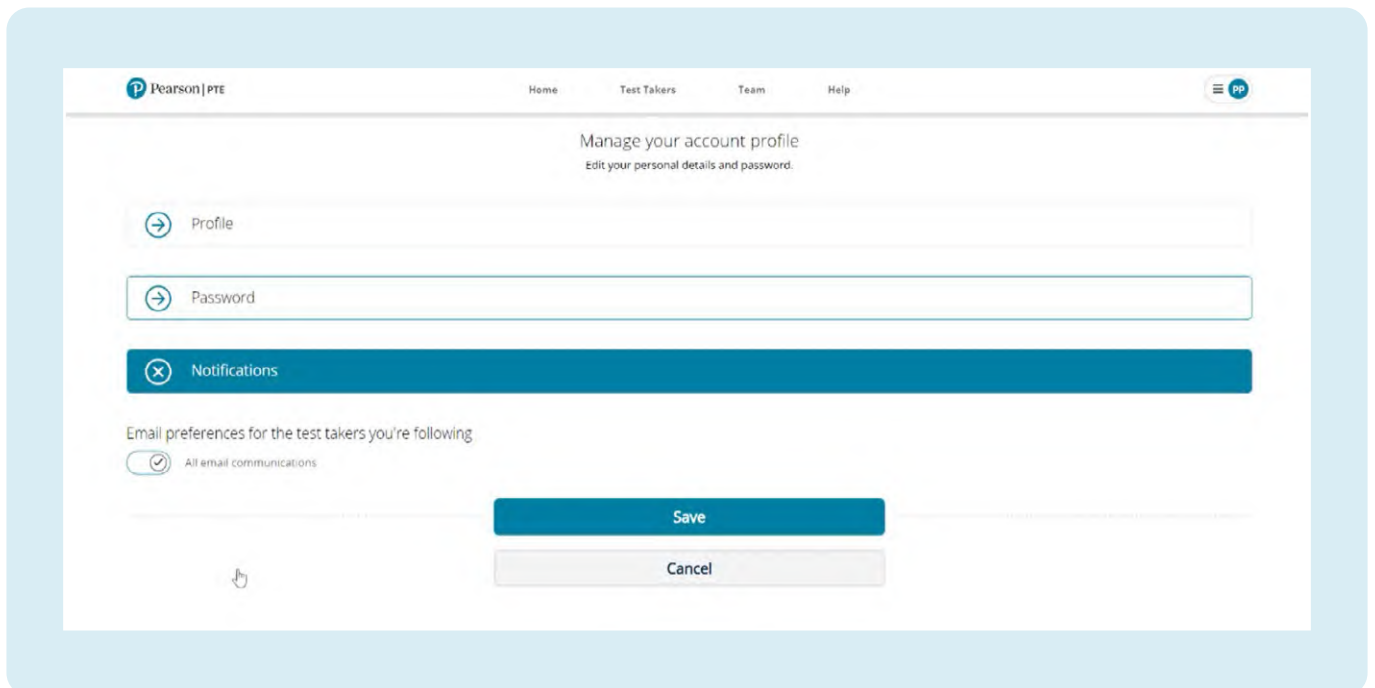
You can change the profile information for your account by clicking your name in the top right corner of the homepage.



You can also change your account password



And opt in / out of email communications

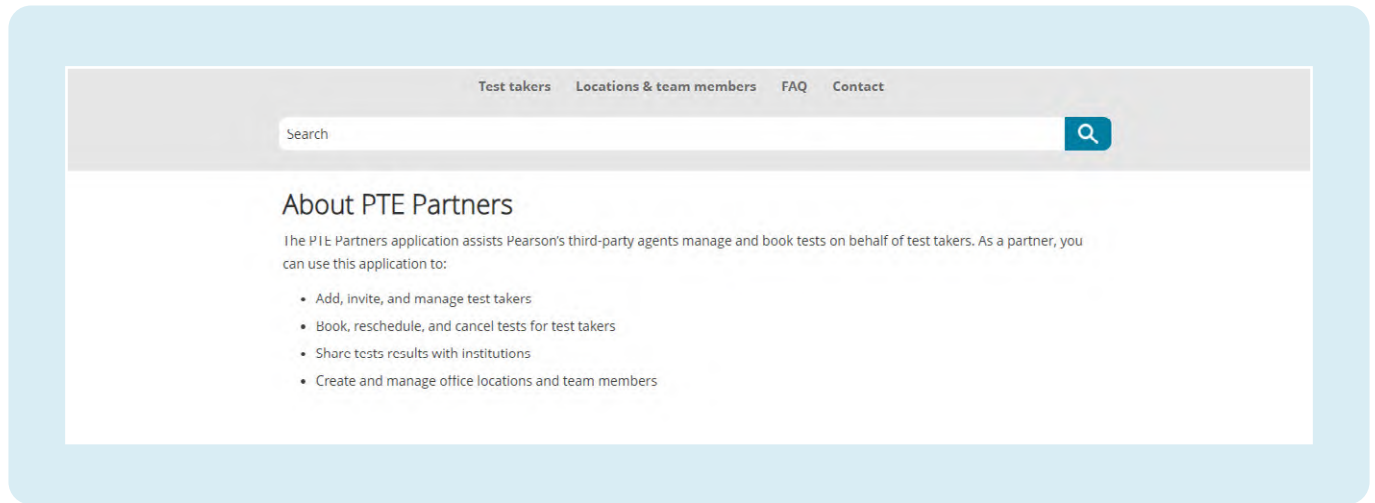




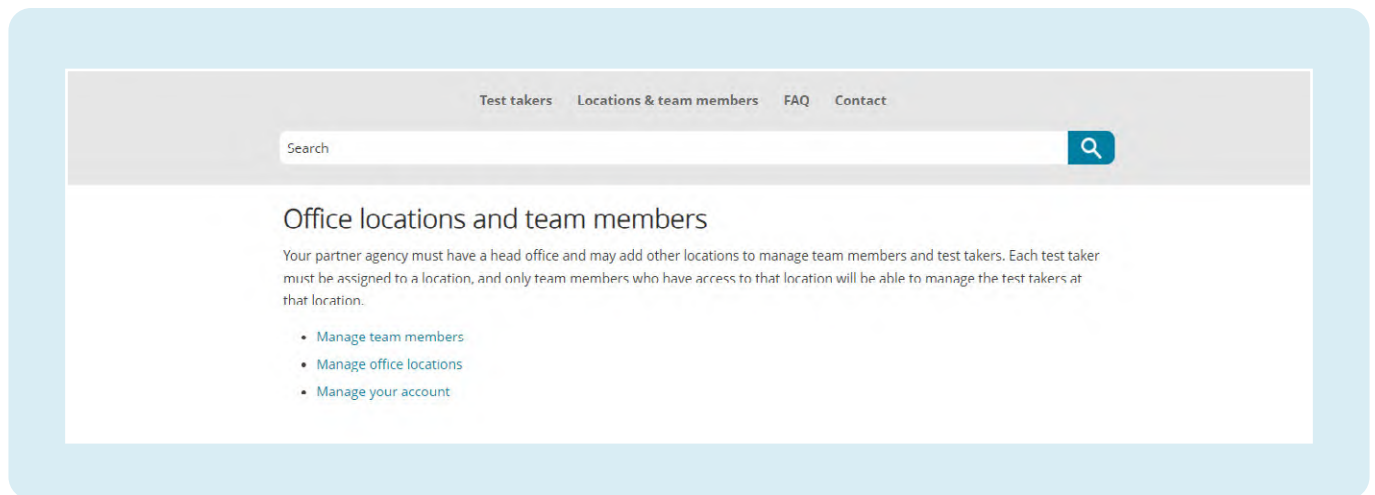
# 11. Help

By clicking the **'Help'** tab, you can find out key information about PTE Partners.

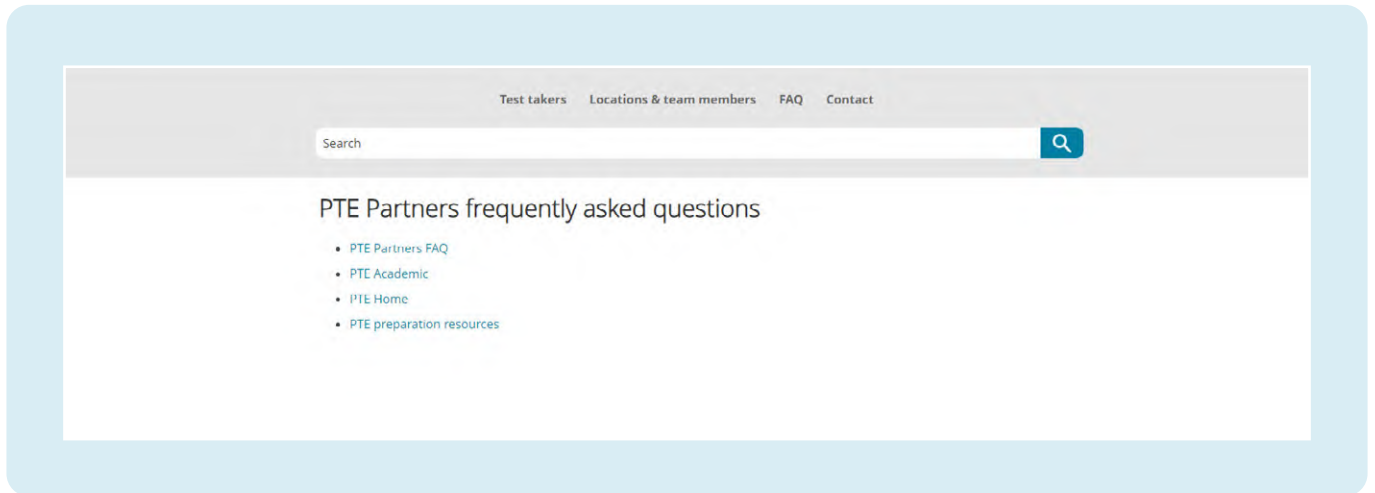
- About PTE Partners / Test Takers tab.



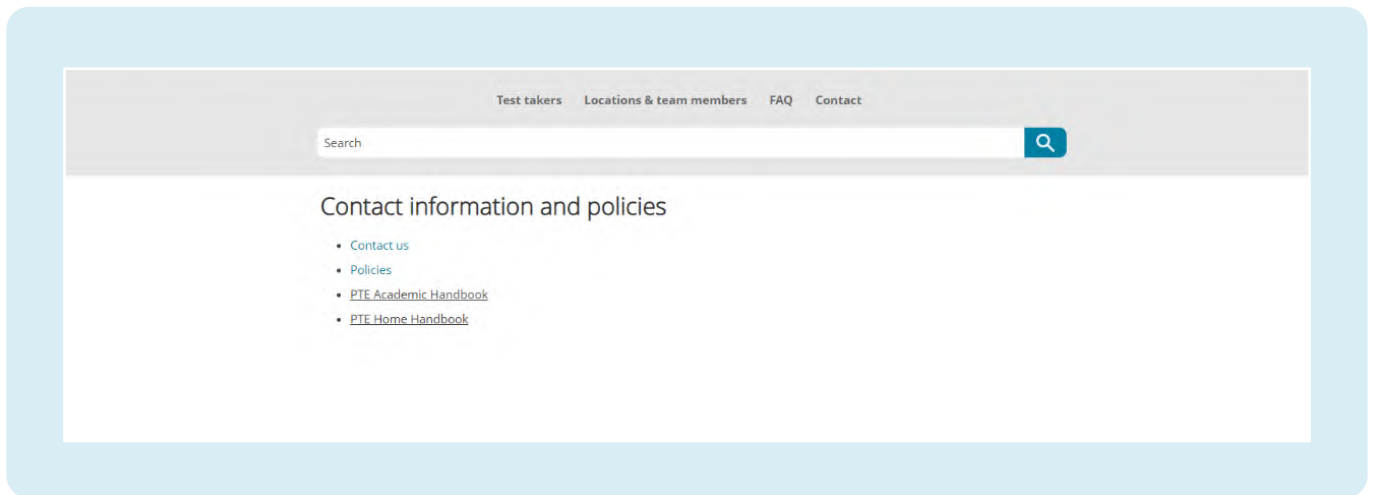
- Locations and Team Members.



- FAQ section.



- Contact information and policies.





Partnering with PTE  
has never been easier.

**Join Now**

[pearsonpte.com](https://pearsonpte.com)

