

Set-up Instructions for Purchasing Multiple Products from the AHA Professional Education Hub

Step 1: License Management Set-up

Purchasing a quantity of 2 or more Subscription or Premium Courses on the [Professional Education Hub](#) requires the use of a **Purchase Code**, which is a unique code that can be used during the [Professional Education Hub Store](#) checkout. This allows the delivery of digital content directly into **License Management**. License Management is the Professional Education Hub's digital inventory management system.

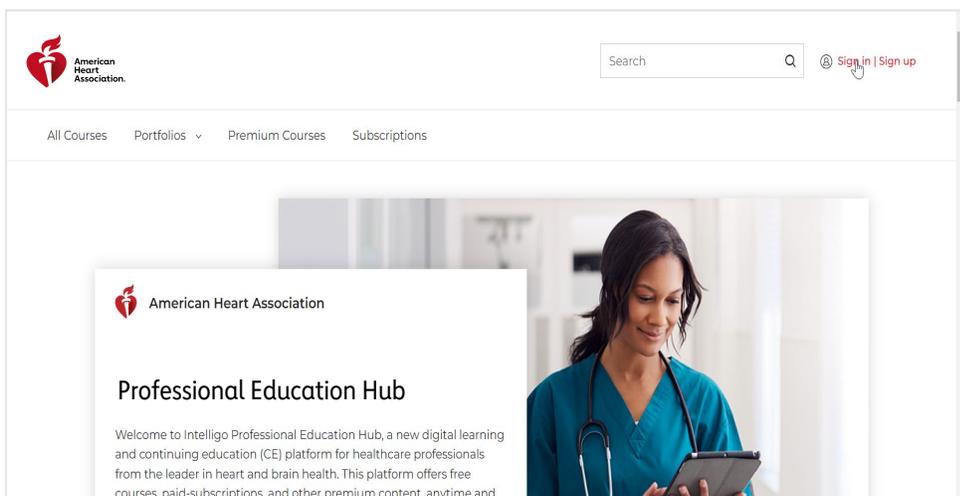
To acquire a Purchase Code to place an order for more than one course, please complete the steps below.

Please note, setting up License Management is a one-time only process. License Management setup may take up to 3-5 business days.

Create a User Profile on the Professional Education Hub

- Visit the Professional Education Hub and select Sign in | Sign Up. (See Screenshot 1A)
 - o If you already have an AHA profile, you may use your existing credentials (username and password) to sign in. (See Screenshot 1B)
 - o If you do not have an existing account, select "Create an Account," and complete the required information. (See Screenshot 1C)

Screenshot 1A



Screenshot 1B

 American Heart Association.

Sign In or Create an Account

* indicates a required field

Sign In

Username / Email:*

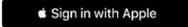
Password:*
[Forgot Password ?](#)

Remember me

Sign In

New User ?
Create an account

Or sign in with your social accounts:

Screenshot 1C

 American Heart Association.

Get Involved  

Let's get started

Create an account to access great heart and brain health content with one username and password.

NOTE: If you already have an account with us, please call 1-800-242-8721 to access your info. [Learn More](#)

* indicates a required field

Tell us about yourself

Country of Lawful Residence (Where you currently live):*

First Name:*
Last Name:*
Email:*
Confirm Email:*
Upload Profile Image:



Mobile Number:

By entering your mobile number, you agree to receive a text message from the American Heart Association to reset your AHA password. Standard call, messaging or data rates may apply.

Password:*

Make it at least seven characters with the following: An uppercase letter, a lowercase letter and a number.

Re-enter Password:*
 I have read and understood the [Terms of Use](#) and [Privacy Policy](#) *

Continue

Already have an account?
Sign In

Once User Profile is created, Customers must contact Customer Support to set up a Professional Education Hub License Management by calling 877-340-9899 or emailing aha.support@heart.org . **NOTE: Hours of operation are Monday – Friday, 8AM to 6PM, Central Time.**

- Information the Customer will need to provide to Customer Support includes the following:
 - Company Name
 - Company Address (including City, State, and ZIP Code)
 - Company Phone Number
 - Primary Company Contact (First Name, Last Name and Email Address)
 - Professional Education Hub License Management Admin (First Name, Last Name, and Email Address)
 - Please note: The Primary Company Contact is the main point of contact for the Company. The Professional Education Hub License Management Admin is the individual who will be managing digital inventory in the Professional Education Hub. This may be the same individual.
- The Customer Support Team will create the License Management account and provide the customer with their unique Purchase Code.

Step 2: Creating an Organization on the Professional Education Hub

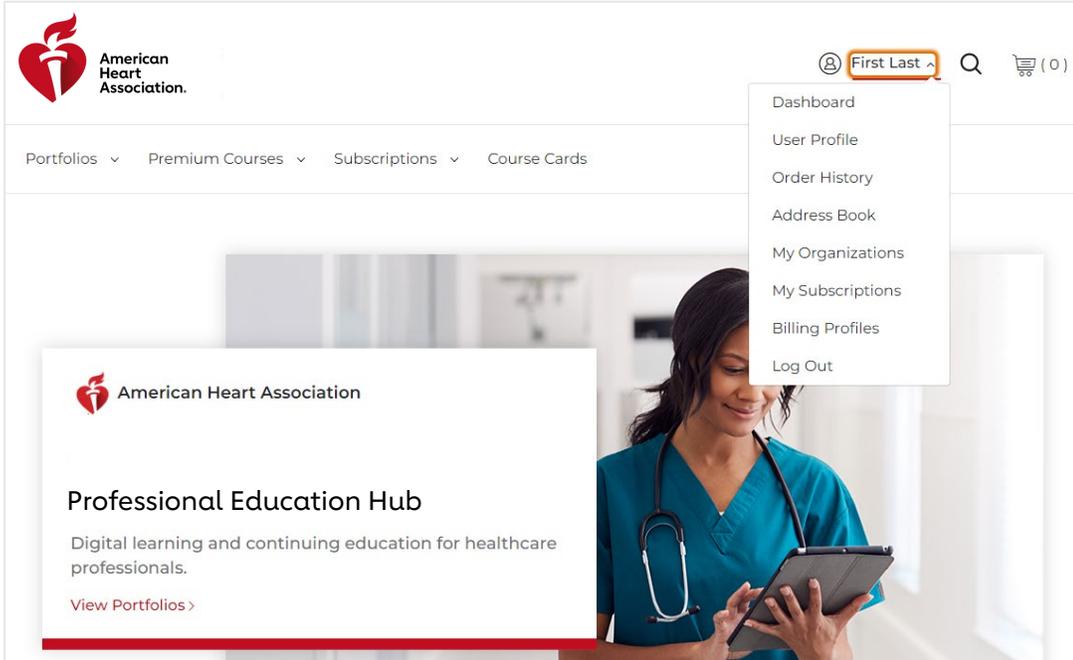
After obtaining a Purchase Code by setting up a License Management account, customers purchasing more than one Premium or Subscription Course will then need to set up an Organization on the [Professional Education Hub](#) **IF they do not already have an Organization setup on ShopCPR.Heart.org.**

Customers who have an Organization on ShopCPR.Heart.org will be able to shop on behalf of their Organization from the [Professional Education Hub Store](#). (See Step 3 below for additional information on Organizations sharing Invoicing across ShopCPR and the Professional Education Hub.)

Customers who do NOT have an Organization on ShopCPR.Heart.org should follow the steps below to set up their Organization. **Please note, setting up your Organization is a one-time only process.**

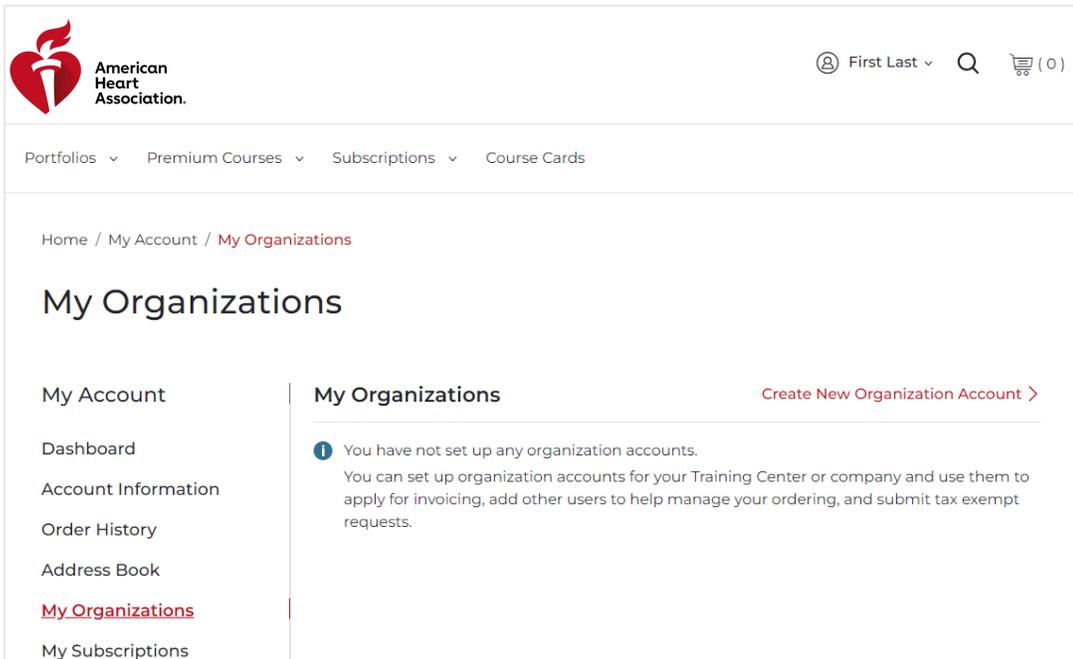
- Sign In using the user account you created on the Professional Education Hub and select My Organizations from your profile (See Screenshot 2A)

Screenshot 2A



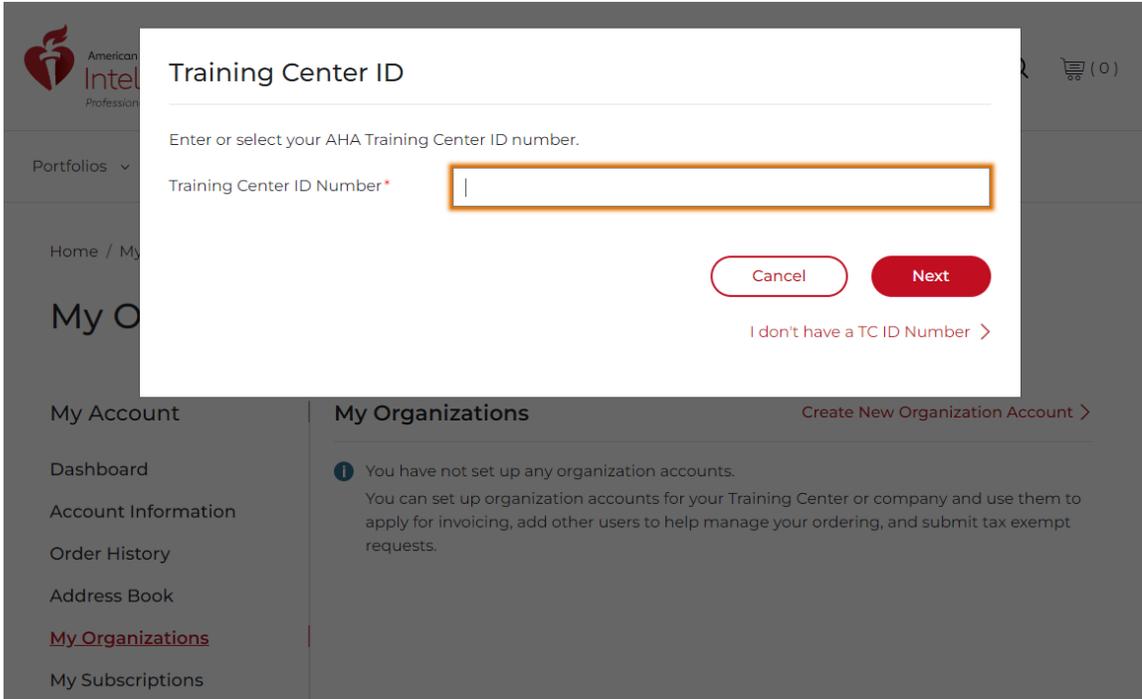
- Select "Create New Organization Account." (See Screenshot 2B)

Screenshot 2B



- Next, you will be able to enter your Training Center ID #. (See Screenshot 2C) If you do not have an TCID #, you can bypass this screen by clicking "I do not have a TC ID Number."

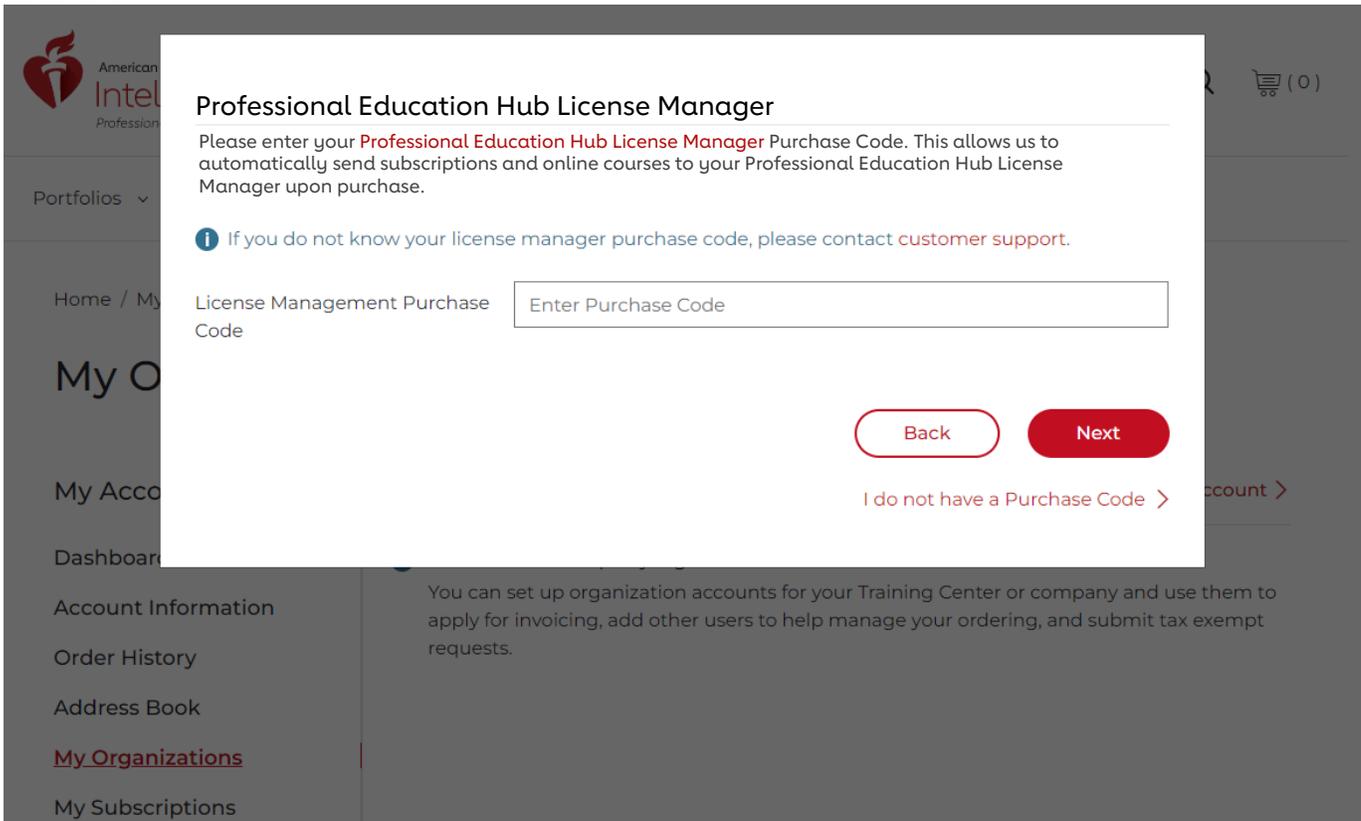
Screenshot 2C



A screenshot of a web application interface. At the top left is the American Intel Professional logo. A modal window titled "Training Center ID" is centered on the screen. Inside the modal, there is a text input field labeled "Training Center ID Number *" which is currently empty. Below the input field are two buttons: "Cancel" (white with a red border) and "Next" (solid red). Below the buttons is a link that says "I don't have a TC ID Number >". The background of the page is dimmed, showing a sidebar with navigation options like "Portfolios", "Home / My", "My Organizations", "My Account", "Dashboard", "Account Information", "Order History", "Address Book", "My Organizations", and "My Subscriptions".

- Enter your Purchase Code when prompted. (See Screenshot 2D)
 - o NOTE: If your Organization is tax exempt, then you must follow the instructions to submit your tax exemption documentation.

Screenshot 2D



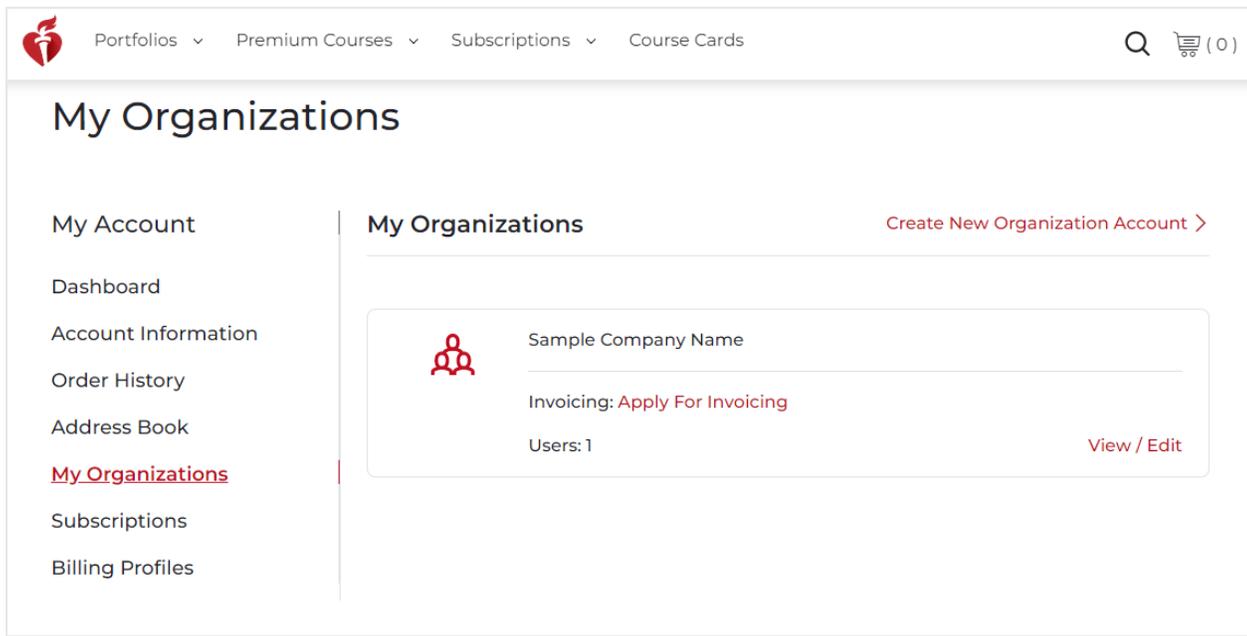
A screenshot of a web application interface. A modal window titled "Professional Education Hub License Manager" is centered on the screen. The modal contains the following text: "Please enter your Professional Education Hub License Manager Purchase Code. This allows us to automatically send subscriptions and online courses to your Professional Education Hub License Manager upon purchase." Below this is an information icon (i) followed by the text: "If you do not know your license manager purchase code, please contact customer support." There is a text input field labeled "License Management Purchase Code" with the placeholder text "Enter Purchase Code". At the bottom of the modal are two buttons: "Back" (white with a red border) and "Next" (solid red). Below the buttons is a link that says "I do not have a Purchase Code >". The background of the page is dimmed, showing the same sidebar as in Screenshot 2C.

Step 3: Applying for Invoicing (optional)

Customers may use a credit card for orders totaling \$10,000 or less. If the order will exceed \$10,000, then the customer will need to apply for invoicing. Please note, if you are shopping on behalf of your Organization and your Organization has Invoicing set up through ShopCPR.Heart.org, your purchases will be deducted from the same credit line/limit.

- From your account profile menu on the [Professional Education Hub Store](#) and select My Organizations.
- Select Apply for Invoicing and complete the online credit application form. (See Screenshot 3A)
- You will be notified of your approval status by email.
- Upon approval, you will have the option to select Invoice as your payment method during checkout.

Screenshot 3A

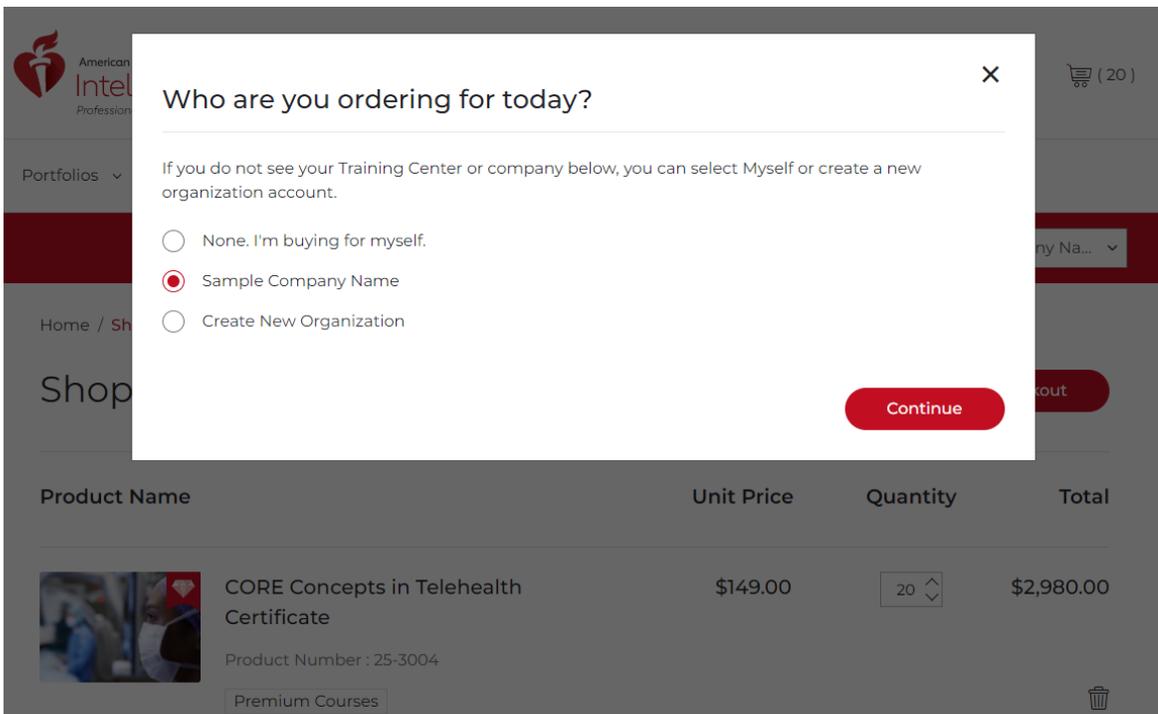


Step 4: Complete Your Order

You are now ready to purchase from the Professional Education Hub Store!

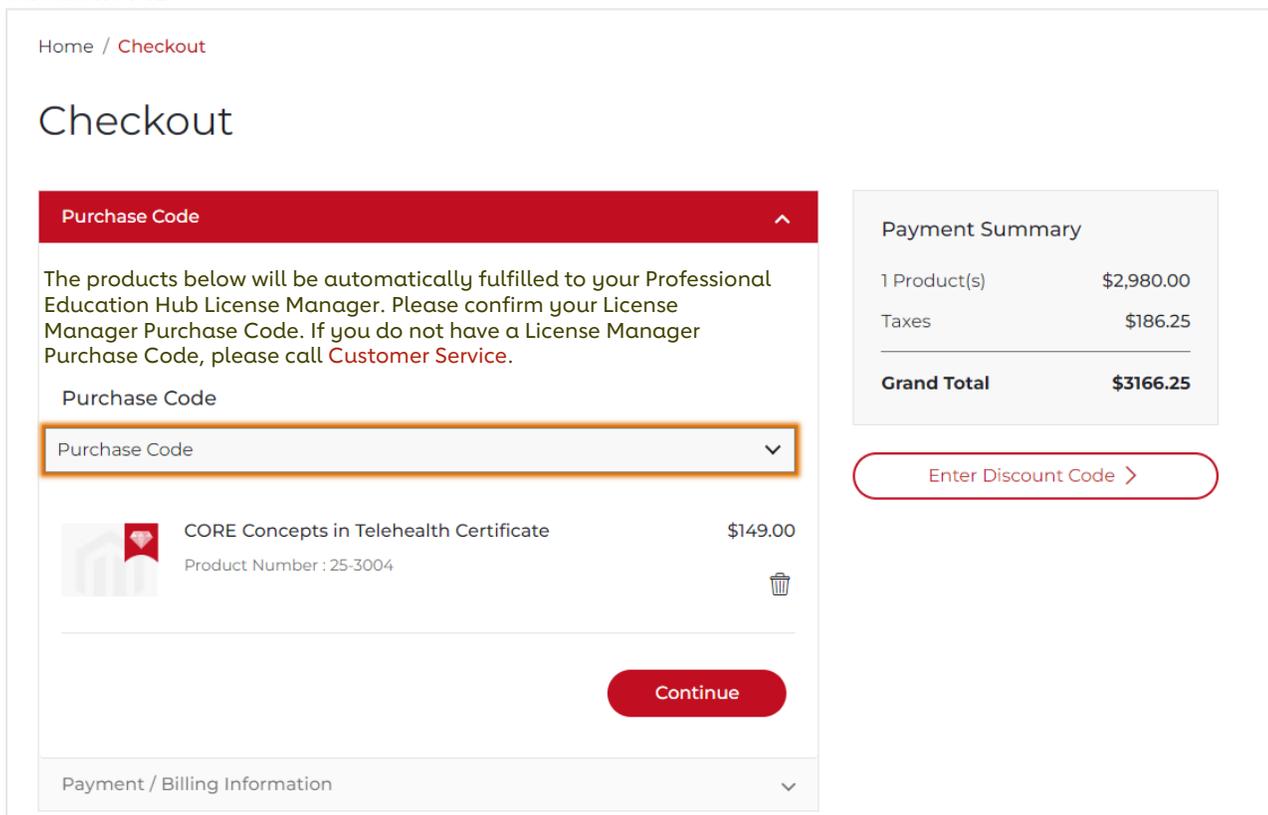
- Select the Subscription and/or Premium Courses you would like to purchase.
- Add the desired quantity to your cart.
- During checkout, indicate that you are purchasing on behalf of your Organization. (See Screenshot 4A)

Screenshot 4A



- Enter or select your License Manager Purchase Code when prompted. (See Screenshot 4B)

Screenshot 4B



- Select your payment method and complete your order. (See Screenshot 4C)

Screenshot 4C

Purchase Code ▼

Payment / Billing Information ▲

Payment

Mode of Payment Credit Card

PO#/Required AP Info
Note: Max 44 characters are allowed

Billing Information Add New Address >

Default Billing Address

Sample Company Name Sample
Company Name
1234 Sample Address,
Dallas, Texas 75213
United States

Select

Proceed to Payment

Payment Summary

1 Product(s)	\$2980.00
Taxes	\$186.25
Grand Total	\$3166.25

Enter Discount Code >

- On your order confirmation page, you will be directed to the Professional Education Hub License Management, where you can assign courses and content to users.

Step 5: Assigning Courses to Users through License Management

- To access the Professional Education Hub License Management, sign in to the [Professional Education Hub](#) using the User Profile you created on the hub.
- If you aren't taken to the License Management page, click on your name at the top right, and select License Management. (See Screenshot 5A)

See Screenshot 5A

The screenshot displays the American Heart Association's Portfolio License Management interface. At the top left is the American Heart Association logo. A search bar is located at the top right, with a user profile dropdown menu for 'Daniel' open, showing options like 'My Intelligo', 'My Library', 'My Account', 'My Certificates & eCards', 'License Management', and 'Logout'. Below the search bar are navigation links for 'All Products', 'Portfolios', 'Premium Courses', and 'Subscriptions'. The main heading is 'Portfolio License Management', with a 'Select License Type' dropdown set to 'Portfolio'. A search field for 'Portfolio Name' and a 'Sort By: Alphabetical' dropdown are also present. Two subscription items are listed:

Subscription Name	Yearly Usage	Duration	Next Charge	Actions
Stroke Subscription Content	Yearly: 1 of 6 in use	Duration: May 2, 2022 to May 2, 2023	Next Charge: May 2nd	...
Telehealth - Subscriptions	Yearly: 4 of 30 in use	Duration: May 3, 2022 to May 3, 2023	Next Charge: May 3rd	...

At the bottom right, a pagination bar shows '1'.

- Click on the Select License Type drop down and select either Portfolio or Premium Course. (See Screenshot 5B)
- Click on the ellipsis for the course you want to assign and select View / Assign License. (See Screenshot 5B)

Screenshot 5B

The screenshot shows the 'Premium Course License Management' page. At the top, there are navigation links: 'All Courses', 'Portfolios', 'Premium Courses', and 'Subscriptions'. Below this is a breadcrumb trail: 'Home / Premium Course License Management'. The main heading is 'Premium Course License Management'. To the right, there is a 'Select License Type' dropdown menu with options 'Premium Course', 'Portfolio', and 'Premium Course'. Below this is a search box for 'Product Name / Product Number' and a 'Filter By' dropdown set to 'Available License'. The page indicates 'Showing 4 of 4 Courses' and 'Sort By: Alphabetical'. Three course cards are visible: 'ASLS Online: Prehospital & In-Hospital Provider' (Product No: 28-1033), 'NIH Stroke Scale – Test Group A' (Product No: 28-1021), and 'NIH Stroke Scale – Test Group C'. Each card shows license usage (e.g., 'License: 2 of 5 in use') and duration ('Jun 24, 2022 to Jun 23, 2024'). A red 'Buy License' button is present on each card. A green arrow points to the 'Buy License' button on the first course card.

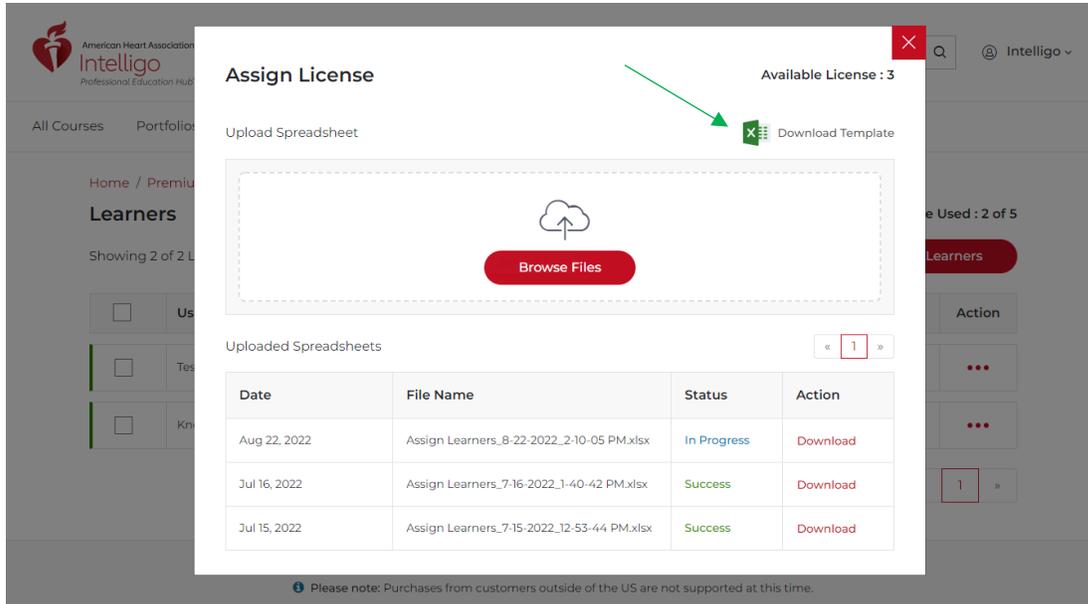
- Click on the red Assign Learners button. (See Screenshot 5C)

Screenshot 5C

The screenshot shows the 'Learners' page for the course 'ASLS Online: Prehospital & In-Hospital Provider'. The American Heart Association logo is in the top left. A search bar and 'Intelligo' logo are in the top right. Navigation links 'All Courses', 'Portfolios', 'Premium Courses', and 'Subscriptions' are below. The breadcrumb trail is 'Home / Premium Course License Management - ASLS Online: Prehospital & In-Hospital Provider / Learners'. The heading is 'Learners'. Below it, it says 'Showing 2 of 2 Learners' and 'License Used : 2 of 5'. There is a search box for 'Search Learners' and a red 'Assign Learners' button. A green arrow points to the 'Assign Learners' button. Below is a table with columns: 'User Details', 'Email Address', 'Assigned On', 'Status', and 'Action'. Two learners are listed: 'TestA TestB' (assigned Jul 15, 2022, Active) and 'Knew Krs' (assigned Jul 16, 2022, Active). A red box highlights the 'Assign Learners' button. At the bottom right, there is a pagination control showing '1'.

- Click on the Download Template button. (See Screenshot 5D)

Screenshot 5D



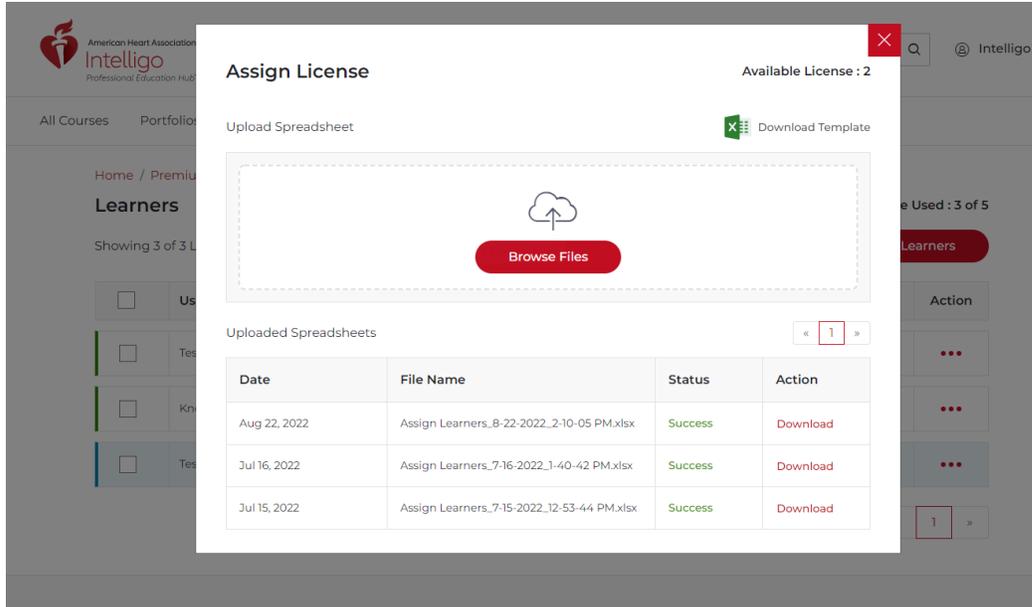
- Open the spreadsheet and fill out the first name, last name, and email ID fields under the Upload worksheet. (See Screenshot 5E)

Screenshot 5E

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	First Name	Last Name	Email ID																		
2	Test	Learner	testlearner@gmail.com																		
3																					
4																					
5																					
6																					
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- Save the spreadsheet, click on the Browse Files button, and select the saved spreadsheet.
- Once the Status under Uploaded Spreadsheets changes to Success, the licenses have been successfully assigned. (See Screenshot 5F)

Screenshot 5F



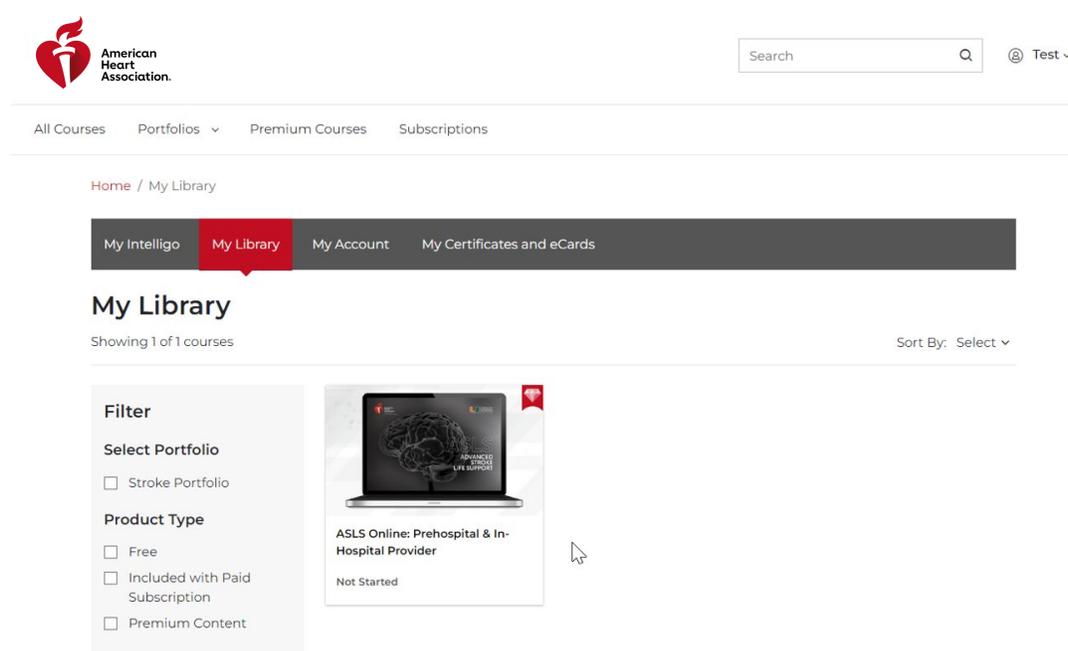
The screenshot shows the 'Assign License' modal window. At the top, it indicates 'Available License : 2'. Below this, there is an 'Upload Spreadsheet' section with a 'Download Template' button. A large dashed box contains a cloud icon and a red 'Browse Files' button. Below the upload section is a table titled 'Uploaded Spreadsheets' with a pagination control showing '1'.

Date	File Name	Status	Action
Aug 22, 2022	Assign Learners_8-22-2022_2-10-05 PM.xlsx	Success	Download
Jul 16, 2022	Assign Learners_7-16-2022_1-40-42 PM.xlsx	Success	Download
Jul 15, 2022	Assign Learners_7-15-2022_12-53-44 PM.xlsx	Success	Download

- Once the assignment has been completed, the Professional Education Hub Admin must inform the learner/student to create a User Profile on Professional Education Hub if they do not already have an existing account (same process as Step 1 on page 1 of this document).
 - o *NOTE: An email will NOT be automatically sent to the learner/student notifying them that a course has been assigned to them on the Professional Education Hub*
 - o *NOTE: The email address used by the learner/student to log into the Professional Education Hub must be the same email address used by the Professional Education Hub Admin to assign the licenses to the student.*

- When the student logs into their account on the Professional Education Hub, they will be taken to their My Library page where the course assigned will be shown. (See Screenshot 5G)

Screenshot 5G



The screenshot shows the 'My Library' page. At the top, there is a search bar and a user profile icon labeled '@ Test'. Below the search bar are navigation tabs: 'All Courses', 'Portfolios', 'Premium Courses', and 'Subscriptions'. The main content area is titled 'My Library' and shows 'Showing 1 of 1 courses'. A 'Filter' sidebar is visible on the left with options for 'Select Portfolio' (Stroke Portfolio) and 'Product Type' (Free, Included with Paid Subscription, Premium Content). The main course card is for 'ASLS Online: Prehospital & In-Hospital Provider', which is 'Not Started'.