

# **SANS Voucher Program:**

Thank you for participating in the SANS Voucher program!

The SANS Voucher program permits your organization to do the following:

- Approve or deny employee training/certification requests
- Monitor employee training progress and exam scores
- Monitor employee training choices, i.e. types of courses, modality, location
- View investment usage and current balance

The information listed below will explain how to utilize the available features associated with a SANS voucher account to allow you, the administrator, to manage the allocation of your organization's training budget to best serve your students.

If you have questions related to your SANS Voucher Account, please email SANS Voucher Support at <a href="Voucher-support@sans.org">Voucher-Support@sans.org</a> or call SANS Customer Service directly at 301-654-SANS (7267).

Thank you again for your participation in the SANS Voucher program. We look forward to creating the best training experience possible for you and your information security team!

Sincerely,

SANS Institute Voucher Team

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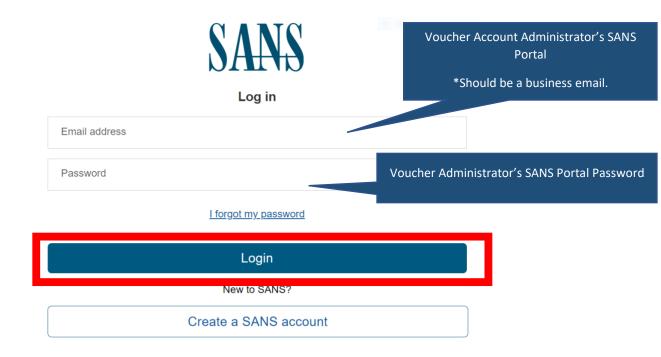
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### 1. Logging into your SANS Portal Account

Go to <a href="www.sans.org">www.sans.org</a> and select "Log in" at the top right corner and input your portal account login credentials. Please use the "I forgot my password" feature if you need to reset your password.

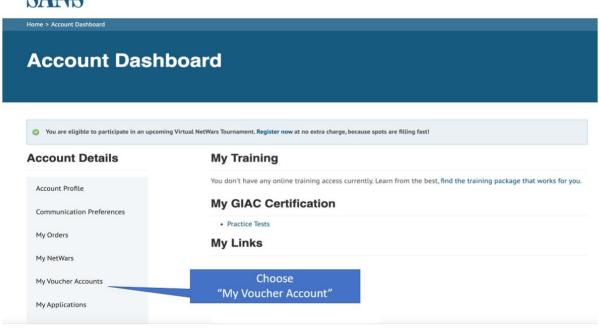


## 2. Accessing your Voucher Account(s)

Upon logging in to your SANS portal account, choose the "My Voucher Accounts" link under Account Details, to access your SANS Voucher Account.

<u>Note:</u> If you do not see "My Voucher Accounts" in your Account Dashboard, please check your email address, sign out, then sign back into your SANS portal account. If problems persist, please email <u>voucher-support@sans.org</u> with your Voucher account number.





## VII. Understanding the Voucher System

### 1. My Voucher Accounts

The "My Voucher Accounts" link provides the Voucher Account Administrator with a list of all accounts associated with the SANS Portal Account utilized during the login process. The following information is provided in the list:

- Voucher Account Name and Number
- Type of Account
  - o Percentage
    - Reflect dollar amounts invested and consumed
- Status of Account
  - o Active
  - Expired
- Expiration Date
- Balance
  - o Please note, current balance does not include registrations that are pending



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Train and Certify	Manage Your Team	Resources	Focus Areas	Get Involved	About

My Voucher Accounts			erlink for t ccount	the <b>Control</b>
Account Company A-Cyber (123456)	lype Percentage	Status Active	Dec 16, 2021	\$53,750.00
Company A-Cyber B (123457)	Percentage	Active	Jan 1, 2022	\$45,000

<sup>\*</sup>Choosing the hyperlink associated with a Voucher account will show the Voucher Account Details for that account only\*

### 2. Overview Page

The Voucher Overview page provides detailed information on the status of the Voucher account, and includes information on:

- 1 Voucher Account Summary/Details
- 2 Investment History
- 3 Pending Payments
- 4 Debit History

#### A. Voucher Account Summary/Details

The Voucher Account Summary/Details section of the Overview page includes the following information:

- Total Investments The total amount of money an organization has invested in Voucher.
- **Total Matched** If SANS also contributed money to a Voucher account in the form of a match or bonus, the total amount of that match or bonus would be reflected here.
- Total Deposits The total amount of money an organization has invested, plus any SANS match or bonus.
- Total Spent The total amount of expenditures charged to your Voucher account.
- Current Balance The total amount of available funds remaining on your Voucher account.
- Account Expiration or Expiration Date Date the Voucher account expires, and the balance becomes unusable.

<sup>\*</sup>Please note, Voucher accounts utilizing a Discount Voucher Model will not show the discount percentage associated with the account in the Voucher Account Details Section of your Voucher Administrator Overview page. Discounts will be reflected on individual student registrations. \*

#### Percentage Voucher Account Summary Sample



		welcome V	oucher Admin		+Q
Train and Certify	Manage Your Team	Resources	Focus Areas	Get Involved	About

# Overview For Voucher Account # 123456

### Voucher Account Summary

Total Investments	Total Matched	Total Deposits	Total Spent	Current Balance	Account Expiration
\$50,500.00	\$3,250.00	\$53,750.00	\$0.00	\$53,750.00	Dec 16, 2021

My Accounts

### B. Investment History

The Investment History section of the Overview page details all investments an organization has made, and includes the following information:

- Amount Invested Each line item represents a separate payment and the amount of that investment.
- **Amount Increased By** If SANS also contributed money to a Voucher account in the form of a match or bonus, the total of that match or bonus would be reflected here.
- **Percentage Increase** Indicates the percent match of additional funds associated with an investment deposited into the Voucher account.
- Total Deposit Amount The total amount of money an organization invested, plus any SANS match or bonus.
- Date of Investment The date your investment was deposited into the Voucher account.
- Payment Method Notates the payment method used for each Voucher investment.
  - Check, Purchase Order, Visa, AMEX, Master Card, or Wire Transfer will appear, based on how funds were received
  - o "Other" will be listed if funds are received based on a payment method other than what is listed above
- Investment Type Will simply indicate "Investment" for all deposits made.

### Percentage Account Investment History Sample

#### Investment History

Amount Invested	Amount Increased By	Percentage Increase	Total Deposit Amount	Date of Investment	Payment Method	Investment Type
\$50,000.00	\$3,200.00	6.4%	\$53,200.00	Dec 16, 2020	Other	Investment
\$500.00	\$50.00	10.0%	\$550.00	Dec 17, 2020	Other	Investment

Manage Account
Subadministrators

Account
Details/Preapproval Code

Account Restrictions

### C. Debit History

Purchases (debits) made using the Voucher Account will be listed here, along with the details associated with each order. This can also be downloaded under the "Downloads" links.

## Debit History

Date	Amount	Order Information
Apr 20, 2022	\$7,640.00	Order / Invoice: 1234567 (PAID) Order Date: Jan 27, 2022 Line Item: Course SEC503: Intrusion Detection In-Depth Event: SANS Dallas 2022 - Live Online (Jun 06, 2022) Dallas, TX Attendee: Jane Doe

### 3. Manage Account Sub-Administrators

All Administrators have the same privileges to pull reports, view balances, and approve/deny registrations. However, only the Primary administrator, or Primary Account Holder, can authorize preapproval codes, as well as add or delete other Sub-administrators (Secondary Account Holders).

\*An individual must have a SANS Portal account to be added as an administrator. We highly recommend that only organizational emails are utilized (not personal) and that all Voucher accounts have more than one administrator. \*

## Voucher Account Administrators

#### Add Subadministrator

Subadministrators are allowed to view account balance and details, as well as approve pending payments.

To add a Subadministrator, please enter the user's SANS Account email address. The user must have already created an account. If they need to create an account, please have them visit https://www.sans.org/account/login

Email Address Add Subadministrator

#### Current Subadministrators

Name	Email Address	Owner Type	Action
Jane Smith	jsmith@example.com	Primary Account Holder	
John Jefferies	jjefferies@example.com	Secondary Account Holder	Delete

## 4. Account Details/Preapproval Code

This page allows you to manage your Email preferences, Low Balance notifications, and Preapproval Code.

#### A. Email Preferences

Turn on/off the ability to receive pending payment and low balance notifications by clicking on the appropriate boxes and click "Save Email Preferences", to ensure the change is made. It is recommended to leave both boxes checked unless you are logging into your SANS Portal account to check for pending payments on a regular basis.

Email Preferences	
<b>Pending Payment Notifications</b>	
☑Receive notifications regarding ar	ny debit entered by a user that requires authorization.
☑Receive notifications when account	nt balance is low.
Save Email Preferences	

#### B. Low Balance Warnings

If the specific box is checked in the email preferences (see above), you can designate the low balance percentage in which you would like to be notified. Be sure to click "Save Details" if any changes are made. \*In this example, an email notification will be sent once funds drop below 10% of the total, which in this instance is \$92,515.60. \*

Low Balance Level	
Set the level that your low balance notificat	ion will trigger and send you an email.
Low Balance Percentage (percent of total):	10
Low Balance Level (The balance at which	notifications will be sent): \$92,515.60
Save Details	

#### C. Preapproval Code

Establishing a Preapproval Code is a way to allow employees to register for courses WITHOUT having an administrator approve the orders. In other words, all registrations utilizing your Preapproval Code will automatically be deducted from your account, with no other authorization required. To create a Preapproval Code, simply enter it twice on this screen and hit "Submit". You may change it again at any point by following the same process, which will also render the prior code unusable.

CAUTION: Careful consideration should be given prior to utilizing a Preapproval Code. Codes must be protected so that unauthorized individuals do not obtain access to your account funds.

#### Change Preapproval Code

Note: The Preapproval Code allows a user to pay for an order in the SANS/GIAC Registration system using the voucher system to automatically apply the payment.

If you do not enter a Preapproval Code, an Administrator will need to approve the registration in the View Pending Payments section of the Voucher System.

	Preapproval Code	
Confirm	Preapproval Code	
	101	Submit

#### 5. Account Restrictions

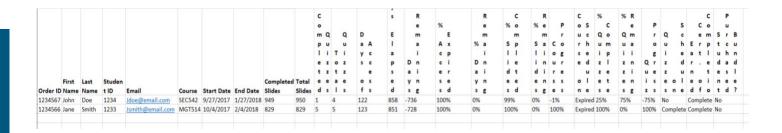
If your Voucher account has any restrictions, it will be displayed here on what can be purchased through the Voucher account.

#### 6. Downloads

There are four reports available for download and are accessible from any page within your Voucher account:

#### A. OnDemand Report

This report allows you to view employee progress for all OnDemand courses purchased through the Voucher account. Below is sample data and a description for all columns provided within the .CSV file.



#### B. Exam Progress Report

This report allows you to view employee progress for all GIAC certification exam attempts purchased through the SANS Voucher account. Given the sensitive nature of this information, you are required to input your full name, password, and the word "ACCEPT" to proceed (not case sensitive). Below is an example of the report with sample data.

# Exam Progress Report

## Exam Progress Report Download

I acknowledge that I am being given access to confidential data about GIAC candidates. I understand that I may not release this information to any other party without the expressed written consent of the candidate. By accessing this data, I agree to indemnify and hold GIAC harmless against any claims of damages related to this data or damages related to our organizations employees and / or GIAC candidates that the data pertains to.

Please supply your full name and then enter your password and type the word "ACCEPT" to digitally sign this page and proceed with the download.

Type the word "ACCEPT":	
Full Name:*	
Password:*	

Submit

Name	Certification	Exam Deadline	Scheduled*	Status
Student_Name	GSEC	12/15/15	12/1/15	Scheduled
Student_Name	GSEC	11/1/15	10/20/15	Passed
Student_Name	GSEC	11/1/15		Expired
Student_Name	GSEC	12/15/15		Authed
Student_Name	GCED	11/1/15		Expired
Student_Name	GCED	1/20/15		Passed
Student_Name	GCED	2/28/15		Authed
* If at a Pearson VUE	testing center			AMPLE

#### C. Debit History Report

This report shows complete data for each order payment debited from the SANS Voucher Account. Below is an example of the report.

Report Date	1-Nov-15								SAMPLE
									5
Amount	Order Number	Order Date	Debit Date	Event	Event Start	Name	Email	Order Type	Comment
2150	1234567	2015-11-04	2015-11-05	SANS OnDemand	2016-02-05	Student_Name	Student@abcco.com	Course: Security 401	Approved by Voucher Administrator <1111111>
599	1234567	2015-11-04	2015-11-05	SANS OnDemand	2016-02-05	Student_Name	Student@abcco.com	Certification - Proctored: GSEC	Approved by Voucher Administrator <1111111>
2150	1234567	2015-11-03	2015-11-04	SANS OnDemand	2016-02-05	Student_Name	Student@abcco.com	Course: Security 579	Approved by Voucher Administrator <1111111>
599	1234567	2015-10-29	2015-11-04	SANS OnDemand	2016-02-05	Student_Name	Student@abcco.com	Certification - Proctored: GCFA	Approved by Voucher Administrator <1111111>
2150	1234567	2015-10-29	2015-11-04	SANS OnDemand	2016-02-05	Student_Name	Student@abcco.com	Course: Forensics 508	Approved by Voucher Administrator <1111111>

#### D. GIAC Renewal Report

This report allows you to review the renewal status of your personnel's certifications. This will also list all the certifications held by Voucher students, when the certifications expire, and provides CPE standings as applicable to each individual certification. Just like the Exam Progress Report, you are required to input your full name, password, and the word "ACCEPT" to proceed (not case sensitive).

## GIAC Renewal Report

## GIAC Renewal Report Download

I acknowledge that I am being given access to confidential data about GIAC candidates. I understand that I may not release this information to any other party without the expressed written consent of the candidate. By accessing this data, I agree to indemnify and hold GIAC harmless against any claims of damages related to this data or damages related to our organizations employees and / or GIAC candidates that the data pertains to.

Please supply your full name and then enter your password and type the word "ACCEPT" to digitally sign this page and proceed with the download.

Type the word "ACCEPT	**
Full Name:* Password:*	
Submit	

4	Α	В	С	D	E	F	G	Н	1	J	К	L	M	N	_
1	Report Date	April 6, 2021													
2					- "										
3	Voucher Account	First Name	Last Name	Account ID	Email	GIAC Cert	Original Cert Date	Last Renewed Date	Expiration Date	CPEs Submitted	CPEs Available				
5															
6															
7															
8															
9															

## VIII. Approving and Denying Registrations

When the proper registration process using the Voucher Account is followed, the registration will appear under the "Pending Payments" section on the Overview page. In addition, if your email settings allow, you will receive an email notifying of a pending payment request. Click "View Details/Approve Funds" to view and approve/deny the use of the Voucher funds.

## Pending Payments

Order ID	User	Event	Amount	Action
1234567	Jane Doe (jdoe@example.com)	SANS Dallas 2022 - Live Online Dallas, TX	\$7,640.00	View Details/Approve Funds

The Order Details page allows you to manage your pending payments. For each line item within an order, you have the option to:

- **Ignore** Selecting this will keep the registration in an Unpaid status and will remain in your pending payments until it is either approved or denied.
- Approve Selecting this will deduct the approved funds from the Voucher Account.

- **Deny** Selecting this will deny funds from being deducted from the Voucher Account for this specific line item. However, the line item will remain on the order so that the employee can pay for the item using a different method.
- **Deny & Delete** Selecting this will not only deny funds from being deducted from the Voucher Account for this specific line item, but it will also remove the line item from the employee's invoice altogether. Please note, this option is only available for add-on products.
  - o Both "Deny" and "Deny & Delete" requires you to input a comment for the employee to see.

Once you select "submit", the employee will receive an email notification of the outcome.

<u>Note</u>: If all line items on an order have been approved, the employee's registration will move to Paid status. If only some line items are approved and others denied, the registration will remain in Partial Paid status, until payment on the balance is arranged. If all line items have been denied or have not yet been approved, the registration will remain in Unpaid status.

\*Invoices must be in Paid status prior to the start of an event in order to attend the course\*

# Order Details For Order # 1234567

### Voucher Account (#012345) Balance: \$53,750.00

Item Type	Amount	Comment**	Action
Long Course SANS Dallas 2022 - Live Online SEC503: Intrusion Detection In-Depth	\$7,640.00		<ul><li>Ignore</li><li>Approve</li><li>Deny</li></ul>
			Submit

## IX. Next Steps

#### 1. Communication with Employees

Once the Voucher Account has been established and all administrators understand the system and their role, it is time to communicate with your designated employees about their ability for utilization of the Voucher. There are a few resources available to assist you with this:

- 1 SANS Course List and Training Roadmap
- 2 SANS Training Schedule
- 3 Registration Instructions for Employees

When providing the Registration Instructions to Employees, please make sure to provide them with the Voucher Account number and appropriate billing information.

#### A. SANS Course List and Training Roadmap

To search for available courses, employees may use the Course List search tool located here: <a href="https://www.sans.org/courses">https://www.sans.org/courses</a>. If employees are unsure of which course to take next, the SANS Training Roadmap offers guidance in course selection and is located here: **Error! Hyperlink reference not valid.** 

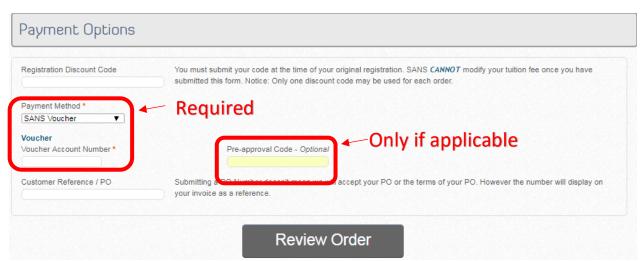
#### B. SANS Training Schedule

As an Administrator, you will receive our SANS Training Schedule monthly, which you may forward to your employees. This document contains all our upcoming courses across all available training formats. To request a copy of this document, you may also email your SANS Account Manager or SANS Voucher Support (Voucher-Support@sans.org).

#### C. Registration Instructions for Employees

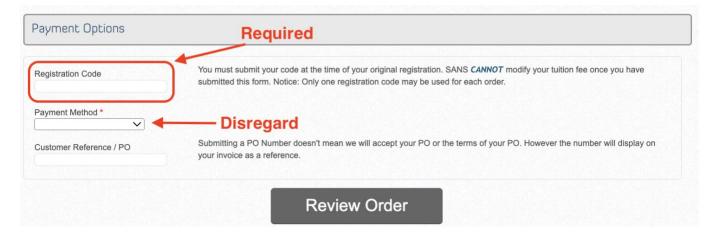
It is important that employees follow the proper steps when registering for any SANS course. This will ensure that the Voucher Administrator is notified of a pending payment, which can then be approved/denied. You will need the organization's SANS Voucher Account number before you begin the registration process.

- 1. Register for any SANS course at <a href="http://www.sans.org">http://www.sans.org</a>. Go to "Train and Certify" and select "Courses". Once you find your course, choose the training format and/or Event that you want to take, and then click on the "Register Now" button.
- 2. If you already have a SANS Account, click "Account Login" and enter the email and password, which will auto-populate your address and personal information. If not, an account will be created for you using the information you input on this page.
- 3. Make sure all required information (marked by an asterisk) is completed.
- 4. If the Billing address is different from your address, please fill in the appropriate information. Otherwise, select "Same as Attendee".
- 5. Select the course and any Add-Ons you will be purchasing.
- 6. Please make sure to check the box indicating that you have "read and agree to the policies below".
- 7. If you have selected a GIAC exam, fill out the GIAC Certification Application.
- 8. Under Payment Options:
  - a. Select the Payment Method of "SANS Voucher".
  - b. Fill in the Voucher Account Number provided to you by your organization.
  - c. Only input a Preapproval Code if directed by your organization.
  - d. Click Review Order.



- 9. Correct any errors found. If no errors are found, please review your order, and then click "Place Order". An email will be sent to the Voucher Account Administrator to approve this payment.
- 10. You should get the message, "Your order is complete."
- 11. Please print a copy of your invoice for your records and look for a confirmation e-mail.
- 12. The employee will receive an email when the Voucher Administrator has approved or denied the order. If you do not receive this email as expected, please contact the Voucher Administrator.

\*If this is a Discount Voucher with an associated Registration Code, input code in the "Registration Code" field. Once inputted, disregard the "Payment Method" \*



### X. FAQs

1. What support exists for Administrators?

Employees with an issue regarding a Voucher paid registration, or any Voucher Account issues can email <u>voucher</u><u>support@sans.org</u>.

- 2. What if an employee registers and forgets to input the Voucher Account Number? Please email <a href="Voucher-Support@sans.org">Voucher-Support@sans.org</a> for assistance including the invoice number and Voucher Account number for payment. Voucher Support will modify the registration and send a pending payment notification for approval.
- 3. What if an employee forgot to include a certification exam when registering for a course? Please email <a href="Voucher-Support@sans.org">Voucher-Support@sans.org</a> for assistance including the invoice number and Voucher Account number for payment. Voucher Support will modify the registration and send you a pending payment notification for approval.
  - 4. What if insufficient funds are available?

Please contact your SANS Account Manager to discuss adding funds to your account. If you are unsure who that is, please email <a href="mailto:Voucher-Support@sans.org">Voucher-Support@sans.org</a>.

5. Which SANS products and services can be paid for with Voucher funds?

Unless there are restrictions on the Account, which would have been negotiated during the sales process and established during the account creation, Voucher funds may be used as described below.

### Voucher funds may be used for:

- SANS live and online courses, summits, GIAC certifications and renewals, and Netwars.
- Graduate course tuition in the SANS Technology Institute's master's degree and graduate certificate programs. Graduate students seeking to use voucher funding can confirm eligibility by contacting <a href="mailto:info@sans.edu">info@sans.edu</a>.

#### Voucher funds may NOT be used for:

- SANS Security Awareness
- WorkStudy
- SANS Workshops at SANS Events
- Partnership Programs
- Conferences Hosted by Other Organizations
- Single graduate courses as a non-degree seeking student at the SANS Technology Institute

### 6. What happens to the Voucher funds when a Voucher paid registration is cancelled?

When a registration is cancelled that was charged to a Voucher Account, the original invoice is removed from the Voucher Account, effectively putting the funds back in the Account. The Voucher System does not work like a credit card, where you will see a debit and then see a credit. The registration will no longer show up on the Debit History, which is how you will know the funds have been put back in the Account.