Help Guide

PSI Continuing Education Online For Education Providers

June 2009

Table of Contents

Welcome

Welcome to PSI Continuing Education Online, the easy way to track and manage your education courses, schedules and course completions.

About PSI For Education Providers

If you are an educator providing services for the insurance industry, then PSI Continuing Education Online offers you a range of services to add and maintain your course offerings, course completion information, and more. All services can be accessed from the Dashboard. For more information, see page 3. For assistance, please contact PSI at ce@psionline.com or 1-877-526-6833.

For Education Providers

If you are an educator providing services for the insurance industry, then PSI Continuing Education Online offers you a range of services to add and maintain your course offerings, course completion information, and more. All services can be accessed from the Dashboard.

The Dashboard

The Dashboard is the starting point for anywhere you want to go within the system. The Dashboard offers the following services:

Education Services

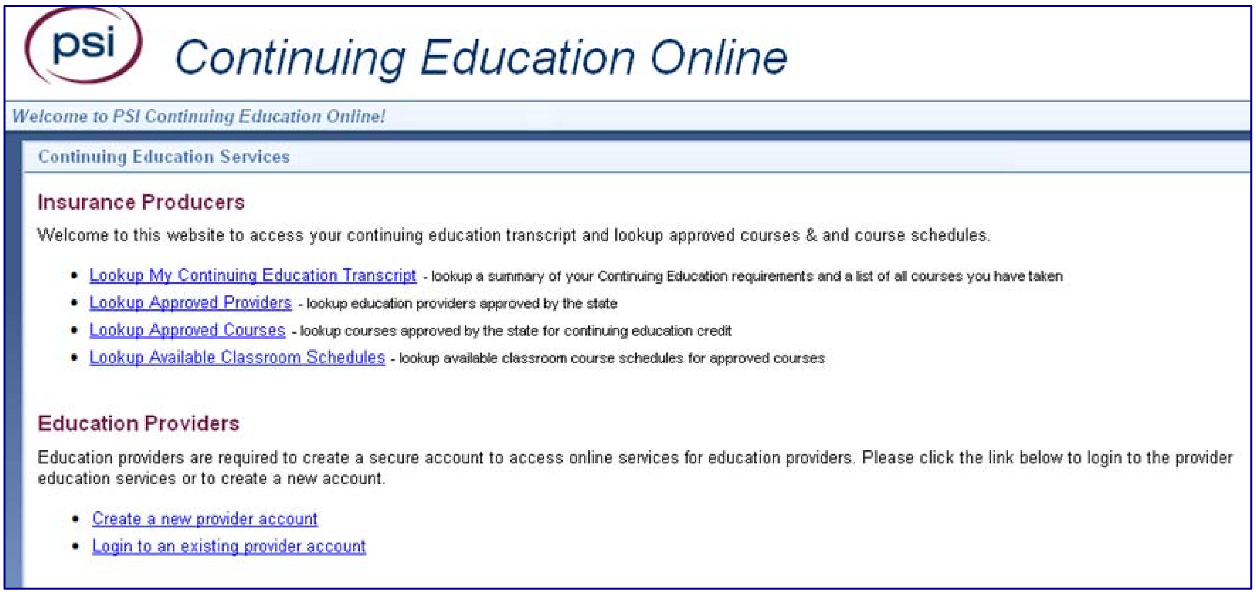
- **Course Offering Maintenance** - Keep course offering schedules, including locations, dates, and times, up to date in the state database. For more information, see page 5.
- **Enter CE Course Completions** - Submit information to a state for individual licensees who have completed a particular provider course to satisfy continuing education or licensure requirements. For more information, see page 9.
- **Upload CE Course Completions** - Select course completions record file and upload it to the state. For more information, see page 14.

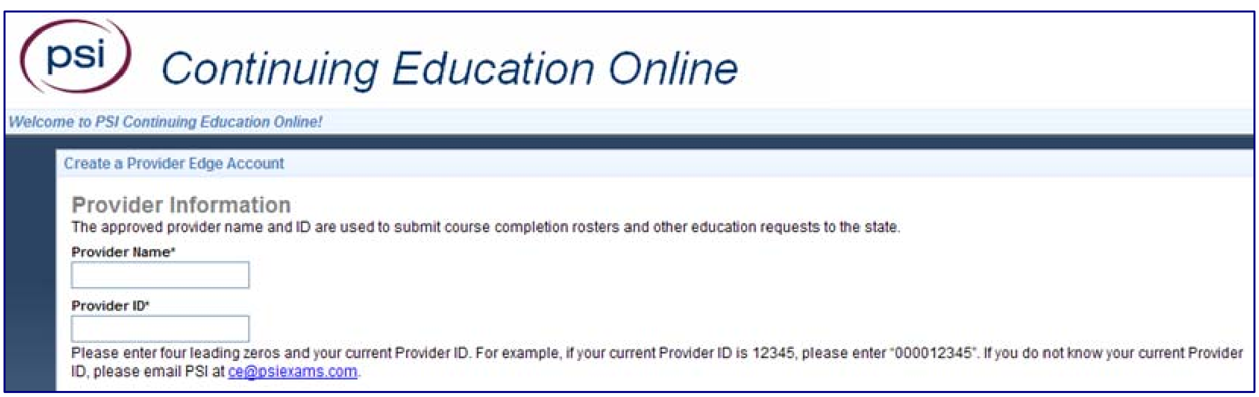
Account Information

- **Updating your Account Information** - Update information about your own account. For more information, see page 25.
- **Maintain Users** (*Administrators only*) - Add, update or delete the account information for one of your staff members. For more information, see page 26.

Logging In

- **Go to www.psiexams.com. Select *New Jersey*, then *Insurance*, and click on *Find Information*. Click on *Continuing Education Services*** under the "Messages" column.





Education Services

Course Offering Maintenance

Use the **Classroom Offering Maintenance** service to keep the schedules of education provider course offerings, including locations, dates, and times, up to date in the state database. This will help ensure that producers will be able to find available class offerings in order to register to attend them.

Note: For step-by-step instructions on using the **Classroom Offering Maintenance** service, please see Updating Class Schedules on page 7.

Fields and controls include the following:

- **Please select a State**: *Required*. From the dropdown menu, select the state in which you want to maintain course offerings.
- **Provider**: *Required*. From the dropdown menu, select the education provider firm or organization whose course offerings you want to maintain.
- **Course ID**: Enter the ID number of the approved course you want to maintain.
- **Submit**: After selecting a state, click to enter provider and/or course information. After entering state and provider or course information, click to view courses that met your selection criteria.
- **Cancel**: Click to leave the page without saving changes.
- **Change State**: Click to select a different state in which to maintain course offerings.
- **Add New Offering**: Click the link to display fields allowing you to maintain class information for the course.
- **Line One Address**: *Required*. Enter the street address of the location where the class will be offered.
- **Line Two Address**: Enter additional address information for the location of the class, such as building name.
- **City**: *Required*. Enter the city in which the class is to be offered.
- **State**: Select from the dropdown menu the state in which the class is to be offered.
- **Province**: If the class is to be held in Canada, select from the dropdown menu the province in which the class is to be offered.
- **Country**: If the class is to be held outside of the United States, select from the dropdown menu the country in which the class is to be offered.
- **Postal Code**: Enter the zip code of the class location.

- **Begin Date**: Enter the date on which the class will begin. Use the mm-dd-yyyy date format
- **End Date**: Enter the date on which the class will conclude. Use the mm-dd-yyyy date format
- **Begin Time**: Enter the time at which the class will begin. Use the hh:mm format. Then, from the dropdown menu, select “AM” (to denote a morning hour) or “PM” (to denote an evening hour).
- **End Time**: Enter the time at which the class will conclude. Use the hh:mm format. Then, from the dropdown menu, select “AM” (to denote a morning hour) or “PM” (to denote an evening hour).

Note: You may enter date and time information for multiple classroom offerings of the same course.

- **Create**: When adding a new offering, click to submit the classroom offering information to the state database and display the **Confirmation** page.
- **Update**: When editing an existing offering, click to submit the classroom offering information to the state database and display the **Confirmation** page.
- **Continue Processing**: On the **Confirmation** page, click to post additional class schedules for other courses.

Note: To print any page, select the Print option from your browser toolbar.

Updating Class Schedules

To use the **Classroom Offering Maintenance** service, follow these step-by-step instructions.

1. From the **Please select a state** dropdown menu, select the state in which you want to update class schedules.
2. Click the **Submit** button.

   The **Classroom Offering Maintenance** page will refresh to show additional options.
3. If you know the exact ID number of the approved course for which you want to post new class schedules, enter it in the **Course ID** field, click the **Submit** button, and then proceed to step 6

   OR

   If you do not know the exact ID number of the approved course for which you want to post new class schedules, select your company or organization name from the **Provider Name** dropdown menu.
4. Click the **Submit** button.

   The **Classroom Offering Maintenance** page will display a list of all of your company's or organization's education courses that have been approved in the selected state.
5. Click the **Add New Offering** link corresponding to the course whose class schedule information you want to update.

   The **Classroom Offering Maintenance** page will display fields for entering updated class schedule information for the selected course.
6. In the **Line One Address** field, enter the street address of the facility at which the class is to be conducted.

   Tip: Use the **Tab** key to navigate from field to field.
7. In the **Line Two Address** field, enter additional street address information (i.e., the name of the building or facility).
8. In the **City** field, enter the city in which the class is to be offered.
9. From the **State** dropdown menu, select the state in which the class is to be held.

   Note: Ignore the Province and Country fields, unless the class is going to be held out of the United States.
10. In the **Postal Code** field, enter the zip code of the class location.
11. In the first **Begin Date** field, enter the month, day, and year the class is to be conducted. (Use the mm-dd-yyyy date format.)

12. In the **Begin Time** field, enter the time at which the class will start. (Use the hh:mm format.

13. From the **Begin Time** dropdown menu, select “AM” (to denote a morning hour) or “PM” (to denote an evening hour).

14. In the **End Date** field, enter the month, day, and year the class is to conclude. (Use the mm-dd-yyyy date format.)

15. In the **End Time** field, enter the time at which the class will conclude. (Use the hh:mm format.)

16. From the **End Time** dropdown menu, select “AM” (to denote a morning hour) or “PM” (to denote an evening hour).

17. Repeat steps 6 through 16 to post additional offerings of the same course.

18. Click the **Create** button. Your posting will be transmitted to the selected state, and the **Confirmation** page will open.

    The **Confirmation** page contains confirmation and reference ID numbers. You may wish to either print the **Confirmation** page or record these numbers, just for future reference.

19. To post additional class schedules for other courses, click the **Continue Processing** button

    Note: To print any page, select the **Print** option from your browser toolbar.

CE Course Completions

Use the **Continuing Education Course Completion** service to submit information to a state for individual licensees who have completed a particular provider course to satisfy continuing education or licensure requirements.

Note: For step-by-step instructions on using the **Continuing Education Course Completions** service, please see Submitting Continuing Education Course Rosters on page 10.

Fields and controls include the following:

- **Please select a State**: *Required*. From the dropdown menu, select the state to which you want to submit continuing course completion information.
- **Provider Name**: *Required*. From the dropdown menu, select the education provider firm or organization of the continuing education course provider.
- **Course ID**: Enter the identification number of the continuing education course.
- **Course Completion Date**: Enter the date on which the continuing education course was completed. (Use the mmddyyyy date format.)
- **Submit**: After selecting a state, click to enter provider and course information.
- **Change State**: Click to select a different state in which to maintain course offerings.
- **Submit Method**: Click a radio button corresponding to the method by which to identify producers who successfully completed the course: **National Producer Number**, or **License Number** (in the selected state).

  Note: Some states use an "identifier" field rather than separating **SSN**, **NPN** and **License Number** into separate fields. Use the **Student Identifier** or **Instructor Identifier** for these states. ANY of the options listed here are acceptable, and therefore you will not be asked to select a Submit Method.
- **National Producer Number**: Enter the National Producer Number (NPN) of students who successfully completed the course or of instructors who led the course.
- **License Number**: Enter the state license number of students who successfully completed the course or of instructors who led the course.
- **Last Name**: Enter the last names of the students who successfully completed the course or of the instructors who led the course.

  Note: The Student Last Name field is required only in certain states; however if you enter a value in the Student Last Name field, then it will be validated against the state database. If your state does not require last name information and you do not enter a value in the Student Last Name field, then only the data that you do enter will be used for validation.
- **Continue Processing**: On the **Confirmation** page, click to post additional class schedules for other courses.

PRINTING A COURSE COMPLETION CERTIFICATE

There are two ways you can you can quickly print state-official certificates of completion for students taking and successfully completing a continuing education course.

1. The primary way is to generate the course completion certificates from the confirmation page immediately after entering or uploading a course roster using the **Enter CE Completions** or **Upload CE Completions** service. After processing the course roster, simply click on the **Generate Course Completion Certificates** link on the Confirmation page. Clicking this link will open all student course completion certificates in a new window.

    - You can print a hard copy of the certificates by clicking the **Print** button in the toolbar. Then, go ahead and add any additional information, sign it, and then mail it off to the producer.

2. The second way is to generate a course completion certificate for a specific producer anytime after the course completion was processed. The process begins by running a system activity report. On the **Education Services Menu** click the **Education Activity Inquiry** link.

    - The **Education Activity Inquiry** page will open.
    - You must enter a date range in which the class or classes were held that the students attended and completed. In the **Date From** field, enter a beginning date for the date range, and in the **To** field, enter the ending date. Remember to use the *mm-dd-yyyy* date format. If the class you are looking for began and ended on the same date, enter the date in both the **Date From** and **To** fields.
    - From the **State** dropdown menu, select the state to which students' course completions were reported.
    - If you know that you want to print pre-licensing course completion certificates, from the **Activity Type** dropdown menu, select Submit CE Course Completions.
    - If desired, make a selection from the **Sort By** menu. The default sort order will group education types, and then list course completions in order by date and then by state. However you can choose to group education types, and then list course completions in order by state and then by date.
    - When you are finished choosing selection criteria, click the **Submit** button. A new page will open showing course completions that met your selection criteria.
    - Note that each line in a group of course completions shows course information, including course name, the date the course completion was submitted to the state, and the status of the submission. Just as importantly, each line also displays student information, including the student's name (at the far right of the table).

- If a course completion line shows a status of "Processed," you can go ahead and print the course completion certificate for the associated student.
- To print a certificate for a student whose name appears in the table, click the **Confirm ID** number appearing in red on the far left of the table (opposite the student name). This is actually a hyperlink that will open the certificate in a separate window.
- You can print a hard copy of the certificate by clicking the **Print** button in the toolbar. Then, go ahead and add any additional information, sign it, and then mail it off to the producer.
- Repeat the preceding steps for each student with a state-processed course completion. When you are finished, close out all certificate windows.

SUBMITTING CONTINUING EDUCATION COURSE ROSTERS

To use the **Continuing Education Course Completion** service, follow these step-by-step instructions.

1. From the **Select a State** dropdown menu, select the state in whose regulatory database you want to record a continuing course completion.

2. Click the **Submit** button.

   The **Course Information** page will open.

3. *Required*. In the **Provider ID** field, select the continuing education course provider from the dropdown menu.

4. In the **Course ID** field, enter the identification number of the continuing education course.

5. In the **Course Completion Date** field, enter the date on which the continuing education course was completed. (Use the mmddyyyy date format.)

6. Click the **Submit** button.

   The **Submit Method** page will open.

   Note: If you do not enter information in the **Course ID** or **Course Completion Date** fields, when you click the **Submit** button the **Continuing Education Course Completions** page will refresh and display a list of all of your company's or organization's CE current courses and course offerings that are approved in the state you selected. Locate the specific class for which you want to enter roster information, and click the corresponding **Course ID** or **Offering ID** link to continue.

7. To identify producers who completed the course by their license numbers in the selected state, click the **License Number** radio button

   OR

   To identify producers who completed the course by their National Producer Numbers (NPN), click the **National Producer Number** radio button

   OR

   T o identify producers who completed the course by their Social Security Numbers, click the **SSN** radio button

   Note: If your state does not permit submission of course completion information based on students' **Social Security Numbers**, the **SSN** option will not appear.

After you make your selection, the **Course Roster** page will open. Header information on this page shows the course provider name and ID, the course name and ID, the course category, the number of credit hours, and the course completion date. The page also contains rows of fields in which you can record identification data of the producers who completed the course.

8. *Required*. If you chose on the **Submit Method** page to identify producers by their Social Security Numbers, in the top and leftmost **SSN** field, enter the Social Security Number of a producer who successfully completed the course.

   OR

   Required. If you chose on the **Submit Method** page to identify producers by their National Producer Numbers (NPN), in the top and leftmost **NPN** field, enter the National Producer Number (NPN) of a producer who successfully completed the course.

   OR

   Required. If you chose on the **Submit Method** page to identify producers by their license numbers in the selected state, in the top and leftmost **License Number** field, enter the license number of a producer who successfully completed the course.

   Tip: Use the **Tab** key to navigate to consecutive fields.

9. In the **Last Name** field, enter the last name of a producer who successfully completed the course.

   Note: The **Last Name** field is required only in certain states; however if you enter a value in the **Last Name** field, then it will be validated against the state database. If your state does not require last name information and you do not enter a value in the **Last Name** field, then only the data that you do enter will be used for validation.

10. Repeat steps 8 and 9 to enter the information in successive fields for other producers who completed the course.

11. To process another continuing education course completion record, click the **Process Another** button. The **Course Information** page will re-open.

    Note: Errors identified on the confirmation page are typically the result of incorrect data entry. If you receive an error, use the error description to pinpoint the error. Resolve the error, and then resubmit the information.

Upload CE Course Completions

Use the **Upload Continuing Education Course Completions** page to select your course completions record file and upload it to the state.

Preparing a Course Completions Record File

Before you can upload a course completions record file, first you must format your data.

The course completions upload function requires a comma-separated format file, or *.csv. To format your course completions record file, you may use a spreadsheet application, such as Microsoft® Excel®, or you may enter the data in a text editor file saved with a .csv extension.

The following sections provide instructions for using either formatting method:

- Using a Spreadsheet Application (see next section)
- Using a Text Editor (see page 16)

Using a Spreadsheet Application

1. Launch a spreadsheet application, such as Microsoft® Excel®.
2. With a new, blank spreadsheet open, using consecutive cells in Row 1, enter the following field names:
    - State
    - Provider Org ID
    - Course ID
    - Course Completion Date
    - Course Begin Date
    - Course Begin Time
    - Course Postal Code
    - Instructor Credit Hours
    - Student SSN
    - Student NPN
    - Student Lic#
    - Student Last Name
    - Instructed Category Code

    The field names you enter in Row 1 constitute the file's header row. The header row will make it easier for you to enter course completion data in the correct fields. However, the course completions upload function will ignore header row data.

Note: The **Student Last Name** field is required only in certain states; however if you enter a value in the **Student Last Name** field, then it will be validated against the state database. If your state does not require last name information and you do not enter a value in the Student Last Name field, then only the data that you do enter will be used for validation.

3. In the appropriate cells in Row 2 of the spreadsheet, enter actual data from the first course completion record. For example, enter the first record's state abbreviation in the **State** field, enter the first record's provider organization ID number in the **Provider Org ID** field, etc.

Important: To help ensure system validation of your data, please refer to Course Completions Record File Requirements on page 20.

Note: Don't worry if a course completion record does not contain data to satisfy all of the fields identified in the header row. You only need to fill out a student's **SSN**, **NPN**, or **Lic#**, not all three. For fields where there is no data to enter, simply leave them blank. Use caution, however, not to enter data in the wrong field.

4. Enter the data from the second course completion record in the appropriate cells in the next row on the spreadsheet.

5. Repeat step 4 until you have entered all of the course completion records on their own separate rows on the spreadsheet.

Note: There is a 200 row limit to .csv rosters.

6. When you are finished, from the **File** menu, select **Save As**. The **Save As** dialog box will open.

7. From the **Save As Type** dropdown menu, select CSV (Comma Delimited) (*.csv).

8. In the **File Name** field, enter a name for the course completions record file.

9. Using the navigation options on the **Save As** dialog box, browse for a location on your system to save the course completions record file.

10. Click the **Save** button. The **Save As** dialog box will close.

Your file is now saved in a comma-separated format and is ready for upload.

Option 1 format showing the Identifier column:

	A	B	C	D	E	F	G	H	I	J	K
1	State	Provider Org ID	Course ID	Completion Date	Begin Date	Begin Time	Postal Code	Instructor Credit Hours	Identifier	Last Name	Instructed Category
2	VA	113820	12	8/18/2007	2/2/2007	9:00	12311		123-45-6789	WALTER	
3	VA	113820	12	8/18/2007	2/2/2007	9:00	12311	3	B3636363	COOPER	GEN

Option 2 format with the SSN, NPN and License Number columns separated:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	State	Provider Org ID	Course ID	Completion Date	Begin Date	Begin Time	Postal Code	Instructor Credit Hours	SSN	NPN	Lic Nbr	Last Name	Instructed Category
2	VA	113820	12	8/18/2007	2/2/2007	9:00	12311		123-45-6789			WALTER	
3	VA	113820	12	8/18/2007	2/2/2007	9:00	12311	3			B3636363	COOPER	GEN

Using a Text Editor

1. Launch a text editor application, such as Notepad® or WordPad®.

2. With a new, blank file open, enter the following field names. Separate each field name with a comma, but do not use a space as a separator. (Refer to the illustration below.)

   State,Provider Org ID,Course ID,Course Completion Date,Course Begin Date,Course Begin Time,Course Postal Code,Instructor Credit Hours,Identifier,Student Last Name,Instructed Category

   Note: As with the .csv format above, you can choose to use the Identifier column to enter **SSN**, **NPN**, **License Number** and **DMV** information for the student, or you may choose to list **SSN**, **NPN** and **License Number** information for the student in their own columns. Both options are shown in the examples below.

   Tip: To save time, you can highlight to select the preceding text block, copy it, and then paste it as a first line in the text editor document.

   The field names you enter constitute the file's header line. The header line may make it easier for you to recognize the course completion data in the file. However, the course completions upload function will ignore header line data.

3. Press the Enter key to move the cursor to the next line.

4. Enter data from the first course completion record. Enter each data value in the order specified in the header line (for example, first enter the **State** value, then enter the **Provider Org ID** value, then the **Course ID** value, etc.) Separate each data value with a comma, but do not use a space as a separator.

5. Press the Enter key to move the cursor to the next line.

6. Enter data from the second course completion record, using the correct order and separating values only with a comma (see step 4).

   Important: To help ensure system validation of your data, please refer to Course Completions Record File Requirements on page 20.

   Note: Don't worry if a course completion record does not contain data to satisfy all of the fields identified in the header line. You only need to fill out a student's **SSN**, **NPN**, or **Lic#**, not all three. For fields where there is no data to enter, simply enter a comma.

7. Repeat steps 5 and 6 until you have entered all of the course completion records, each on its own separate line in the file.

   Note: There is a 200 row limit to .csv rosters.

8. When you are finished, from the **File** menu, select **Save As**. The **Save As** dialog box will open.

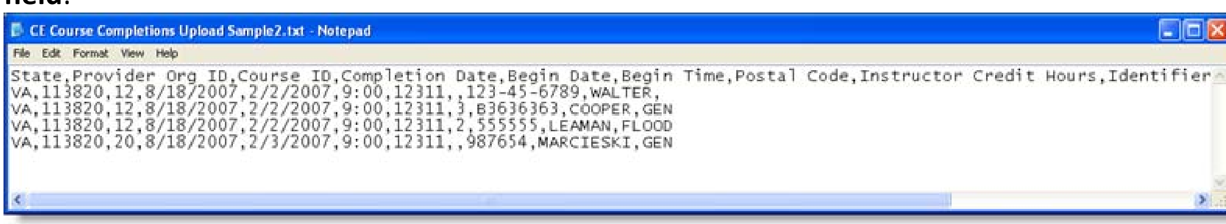
9. In the **File Name** field, enter a name for the course completions record file, then enter a period, and then enter "csv".

10. Using the navigation options on the **Save As** dialog box, browse for a location on your system to save the course completions records file.

11. Click the **Save** button. The **Save As** dialog box will close.

    Your file is now saved in a comma-separated format and is ready for upload.

Option 1 format, with the Identifier field:

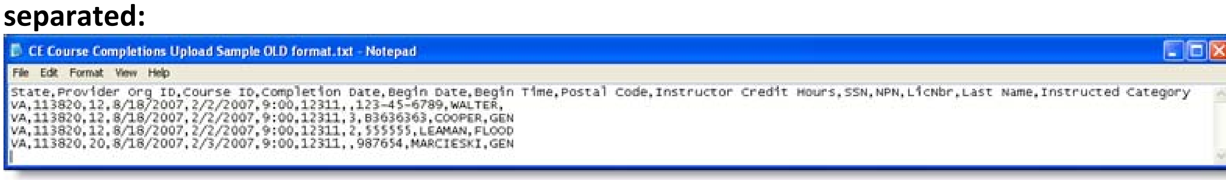


CE Course Completions Upload Sample2.txt - Notepad

File Edit Format View Help

```
State,Provider Org ID,Course ID,Completion Date,Begin Date,Begin Time,Postal Code,Instructor Credit Hours,Identifier
VA,113820,12,8/18/2007,2/2/2007,9:00,12311,,123-45-6789,WALTER,
VA,113820,12,8/18/2007,2/2/2007,9:00,12311,3,B3636363,COOPER,GEN
VA,113820,12,8/18/2007,2/2/2007,9:00,12311,2,555555,LEAMAN,FLOOD
VA,113820,20,8/18/2007,2/3/2007,9:00,12311,,987654,MARCIESKI,GEN
```

Option 2 format with the SSN, NPN and License Number fields separated:



CE Course Completions Upload Sample OLD format.txt - Notepad

File Edit Format View Help

```
State,Provider Org ID,Course ID,Completion Date,Begin Date,Begin Time,Postal Code,Instructor Credit Hours,SSN,NPN,LicNbr,Last Name,Instructed Category
VA,113820,12,8/18/2007,2/2/2007,9:00,12311,,123-45-6789,WALTER,
VA,113820,12,8/18/2007,2/2/2007,9:00,12311,3,B3636363,COOPER,GEN
VA,113820,12,8/18/2007,2/2/2007,9:00,12311,2,555555,LEAMAN,FLOOD
VA,113820,20,8/18/2007,2/3/2007,9:00,12311,,987654,MARCIESKI,GEN
```

UPLOADING A COURSE COMPLETIONS RECORD FILE

1. On the **Upload Continuing Education Course Completions** page, click the **Browse** button. The **Choose File** dialog box will open.

2. Use the navigation options on the **Choose File** dialog box to locate the course completions record file (*.csv) on your system.

3. When the correct file name appears in the **File Name** field, click the **Open** button.

   The **Choose File** dialog box will close, and the system path to the file will appear in the **File to Upload** field.

4. Click the **Submit** button.

The file will be imported. When it is finished, the **File Load Results** page will appear. (For more information, see Upload Course Completions File Load Results in the next section.)

UPLOAD COURSE COMPLETIONS FILE LOAD RESULTS

Use the **File Load Results** page to review and confirm the results of the continuing education course completions record file upload process.

The top part of the page displays summary information about this transaction, including **Provider ID** and **Name**, **Service Type**, **Request Date**, **State**, and **Requestor**. This information is transmitted to the state along with the course completion data.

Below the summary information is a list of all course completion records that have been uploaded in this upload session. The records are sorted in ascending order by row number. The list provides the following visual information about the status of the uploaded records:

- Records displaying black text characters have been successfully validated by and are ready for transmission to the state. (Regular processing fees will be charged for these records regardless of whether they are processed or not processed because of state-validation errors.)
- Records displaying red text characters and error messages have not passed validation and will not be transmitted to the state. Read the contents of the error message and make necessary corrections to the upload file before again attempting upload the file. (Records containing validation errors will not be transmitted and will not incur a processing fee.)

To transmit validated records to the state, click the **Submit** button. When the operation is complete, the **State Submission Results** page will open. (For more information, see Upload Course Completions State Submission Results in the next section).

UPLOAD COURSE COMPLETIONS STATE SUBMISSION RESULTS

Use the **State Submission Results** page to review the continuing education course completion records that have been successfully transmitted to the state in this session.

The top part of the page displays summary information about this transaction, including **Provider ID and Name**, **Service Type**, **Request Date**, **State**, and **Requestor**. This information was transmitted to the state along with the course completion data.

Below the summary information is a list of all course completion records that were transmitted to the state in this upload session. Records are sorted by **Course Name**, **Offering ID**, and row number.

Each record contains a confirmation number (**Conf ID**) to track successful transmission to the state. Only processed records contain a reference number (**Ref ID**). A record not processed because of a state-validation error will display an error message in the **Message** field. Note that all records submitted to the state are charged regular fees, regardless of whether they were processed or not processed because of errors.

You may use the **Print** command in your browser to print the **State Submission Results** page, if desired.

When you are finished, click the **Done** button.

Course Completions Record File Requirements

To help ensure system validation of your data, please refer to the format requirements, below.

Field	Format
State	Two characters, required
Provider Org ID	Numeric, required
Course ID	Numeric, required
Course Completion Date	mm/dd/yyyy. Required.
Course Begin Date	mm/dd/yyyy. Required.
Course Begin Time	Required.
Course Postal Code	5-11 characters; required if Course Begin Date and Course Begin Time are used.
Instructor Credit Hours	Leave Blank.
Student Identifier	1 - 20 characters; required. Use the student license number.
Student Last Name	1-35 characters; required.

Note: At least one of the four student identifiers (SSN, NPN, License Number, DMV Number) must be included. If more than one identifier is included, then they must refer to the same licensee in the state database. If NPN is not yet assigned in the state database, the NPN will be ignored. If NPN does exist but does not match the same individual, a state posting error will result.

Instructed Category Code Field	Format
AH	Accident & Health
AHADJ	Accident & Health Adjuster
AHDIS	Accident & Health Including Disability
ALL	All
CAS	Casualty
ETH	Ethics
FLOOD	Flood
GEN	General
HLTH	Health
HC	Health & Casualty
HP	Health & Property
HPC	Health, Property and Casualty
LAH	Life, Accident & Health
LAHPC	Life, Accident Health P&C
LI	Life
LC	Life & Casualty
LH	Life & Health
LHC	Life & Health, Casualty
LHP	Life, Health & Property
LPC	Life, Property and Casualty

Instructed Category Code Field	Format
LP	Life & Property
NA	Not Applicable
OTHR	Other
PC	Property & Casualty
PCADJ	Property & Casualty Adjuster
PPC	Personal Property & Casualty
PROP	Property
TI	Title
TIETH	Title Ethics
WC	Workers' Compensation
WCADJ	Workers' Compensation Adjuster
PA	Public Adjuster

EDUCATION ACTIVITY INQUIRY

Use the **Education Activity Inquiry** to run a report showing all service request activity for a specified time period. From the inquiry results for continuing education service requests in certain states, you can view and print a state-official certificates of course completion.

The **Education Activity Inquiry** page offers the following fields and controls:

- **Date From**: *Required*. Enter the beginning date of a date range during which you want to report service request activity.
- **To**: *Required*. Enter the ending date of a date range during which you want to report service request activity.
- **State**: If desired, select a state from the dropdown menu to limit the report only to service request activity in the selected state. If no state is selected, the report will contain service request activity in all available states.
- **Activity Type**: If desired, select an activity type from the dropdown menu to limit the report only to a specific service request activity. If no activity type is selected, the report will contain all service request activity.
- **Sort By**: Select from the dropdown a sort order for the report. The default sort order is **Ascending by Activity Type, Date and State**, which groups activity types, and then lists activities in order by date and then by state. Select **Ascending by Activity Type, Date and State** to group activity types, and then list activities in order by state and then by date.
- **Submit**: Click to run the report. The report will open in a separate browser window.
- **Cancel**: Click to exit the page without running the inquiry.

INQUIRY RESULTS

The **Education Activity Inquiry Results** page displays education service request activity that met your selection criteria.

It contains the following controls:

- **Confirm ID**: Continuing Education Course Completion sections only. Click the **ID** link to open a separate window display a course completion certificate for the associated student.

- **Next Page**: If your inquiry result spans more than one page, click to display the succeeding inquiry result page.

- **Prev Page**: If your inquiry result spans more than one page, click to display the preceding inquiry result page.

- **Printable Version**: Click to open a printer-friendly version of the inquiry in a separate window.

- **Revise Inquiry**: Click to choose different selection criteria and resubmit the inquiry.

- **Cancel**: Click to exit the page.

Account Information

Your Account Information

Use the **My Account** page to update your account information at any time. If you are not a system administrator, then you will not see all of the fields listed here.

Fields and controls include the following:

- **Return to Dashboard**: Click to return to your dashboard without saving any changes.
- **Provider Name**: Displays the name of the provider and is not modifiable.
- **Provider EIN**: Displays the Employer Identification Number of the provider and is not modifiable.
- **First Name**: *Required*. Provider representative's first name.
- **Last Name**: *Required*. Provider representative's last name.
- **Position/Title**: Provider representative's position or title with the provider.
- **Address Line 1**: *Required*. The first line of the provider address.
- **Address Line 2**: Second line of provider address (optional).
- **City**: *Required*. Provider address city.
- **State**: *Required*. Providers address state.
- **Zip Code**: *Required*. Provider address zip code.
- **Business Phone**: *Required*. Provider office phone number.
- **Extension**: Provider representative extension, if any.
- **Email address**: *Required*. This field is required in order to receive any notifications. To change your email address, simply type it into the field provided.
- **Confirm email address**: *Required*. When changing an email address, it must be entered twice to verify that it is correct.
- **New password**: To change the account password, enter the new password in the field provided.

  Note: Password must be at least 6 characters long and contain a capital letter and a number.
- **Confirm new password**: In order to confirm the password change it must be entered a second time.
- **Save changes**: Click this button to save any changes to the page.
- **Cancel Changes**: Click this link to discard any changes and return to the dashboard.

Maintain Users

Use the **Maintain Users** page to add, edit and delete user accounts.

Note: Only system administrators will have access to the **Maintain Users** page.

To access the page, click the **Maintain Users** link in the upper right corner of the page.

The **Maintain User Accounts** table displays information for all users currently in the system. You may choose to:

- Add a New User
- Edit an Existing User
- Delete a User

Add a New User

To give a new user access to your account, click the **Add New User** button. The **Maintain User Account** panel will refresh to show fields into which you can enter the new account information. Fields and controls include:

- **First Name**: *Required*. Provider representative's first name.
- **Last Name**: *Required*. Provider representative's last name.
- **Position/Title**: Provider representative's position or title with the provider.
- **Business Phone**: *Required*. Provider office phone number.
- **Extension**: Provider representative extension, if any.
- **Email address**: *Required*. This field is required in order to receive notifications. To change your email address, simply type it into the field provided.
- **Confirm email address**: *Required*. When changing an email address, it must be entered twice to verify that it is correct...
- **New password**: To change the account password, enter the new password in the field provided.

  Note: Password must be at least 6 characters long and contain a capital letter and a number.
- **Confirm new password**: In order to confirm the password change it must be entered a second time.
- **Create User Account**: Click this button to save any changes to the page.
- **Cancel Changes**: Click this link to discard any changes and return to the dashboard.

Edit an Existing User

To edit an existing user's information, click the **Edit** link in the **Action** column of the desired record in the **Maintain User Accounts** table.

Fields and controls are exactly the same as those described in the **Add a New User** section of these instructions. To make a change, simply overwrite any existing information and click the **Save Changes** button.

Delete a User

To delete an existing user's account, click the **Delete** link in the **Action** column of the desired record in the **Maintain User Accounts** table.