

2021

# Continuing Education Module

Industry Access Portal - User Manual

LOUISIANA DEPARTMENT OF INSURANCE

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## New Courses

The New Courses grid displays all courses that are currently in draft mode or pending, as well as courses that have been declined as incomplete or denied.

You can sort the courses displayed in the grid in by ascending or descending order by clicking on any of the grid headers. You can also filter the courses displayed in the grid by clicking the filter icon on any of the grid headers and entering the desired criteria.

Continuing Education Module
jvernon@ldi.state.la.us  
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### New Courses

	Form Type	Course Title	Instruction Method	Date Started	Date Submitted	Status	Action(s)
<a href="#">Continue</a>	NAIC	new title	Classroom/Lecture	10/28/2021		Draft	
<a href="#">Continue</a>		license types		11/03/2021		Draft	
<a href="#">Continue</a>				11/03/2021		Draft	
<a href="#">Continue</a>				11/03/2021		Draft	
<a href="#">Continue</a>				11/04/2021		Draft	
<a href="#">Continue</a>	NAIC	New Title	Web-based Seminar (Webinar)	11/05/2021		Draft	
<a href="#">Continue</a>	NAIC	Test for Brian	Classroom/Lecture	11/09/2021		Draft	
<a href="#">View</a>	NAIC	qwerty1	Classroom/Lecture	11/09/2021		Declined/Incomplete	
<a href="#">View</a>	NAIC	qqqq	Web-based Seminar (Webinar)	11/09/2021		Pending Payment	
<a href="#">View</a>				11/09/2021		Denied	

1 2 3 10 Items per page
1 - 10 of 21 items

## Export to Excel

To export the data in the New Courses grid to Excel, click the “Export to Excel” button. An Excel spreadsheet containing the data will open.

### New Courses

[Add New](#)
[Export to Excel](#)

	Form	Co	Date	Date		
--	------	----	------	------	--	--

### Continue Draft

To resume working on a course that is in draft mode, click the “Continue” link. The New Course Submission screen will open. All fields will be editable until you submit the course to the LDI for review.

New Courses							
<a href="#">Add New</a>	<input checked="" type="checkbox"/> Export to Excel						
	Form Type	Course Title	Instruction Method	Date Started	Date Submitted ↓	Status	Action(s)
<a href="#">Continue</a>	NAIC	new title	Classroom/Lecture	10/28/2021		Draft	
<a href="#">Continue</a>		license types		11/03/2021		Draft	

### View Course

To view a course that is pending, incomplete, or denied, click the “View” button. The New Course Submission screen will open. Please note that the course will be in view-only mode and that you cannot edit any fields.

<a href="#">View</a>	NAIC	qwerty1	Classroom/Lecture	11/09/2021		Declined/Incomplete	
<a href="#">View</a>	NAIC	qqqq	Web-based Seminar (Webinar)	11/09/2021		Pending Payment	
<a href="#">View</a>				11/09/2021		Denied	

items per page 1 - 10 of 21 items

### Delete Course

To delete a course that is in draft mode, click the trashcan icon. Please note that you cannot delete a new course once it has been submitted to the LDI for review.

New Courses							
<a href="#">Add New</a>	<input checked="" type="checkbox"/> Export to Excel						
	Form Type	Course Title	Instruction Method	Date Started	Date Submitted ↓	Status	Action(s)
<a href="#">Continue</a>	NAIC	new title	Classroom/Lecture	10/28/2021		Draft	
<a href="#">Continue</a>		license types		11/03/2021		Draft	

### Add New Course

To add a new course, click the “Add New” button.

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### New Courses

[Add New](#) [Export to Excel](#)

Type	Course Title	Instruction Method	Date Started	Date Submitted	Status	Action(s)
NAIC	new title	Classroom/Lecture	10/28/2021		Draft	

[Continue](#)

The Add New Course Submission screen will open.

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### New Course Submission

Form Type ? Course Title ?

Select Form Type ▼

Instruction Method ? Completion Method ?

Select Instruction Method ▼ Select Completion Method ▼

Course Description ?

#### License Type

**Choose the license/line type that corresponds with the subject matter of the course you are filing** (ex. If the subject matter of your course is Bail, please select Bail. DO NOT select all license types if your course does not contain subject matter from that category).

Producer - Life

Producer - Accident and Health or Sickness

Producer - Property

Producer - Bail

Adjuster

Producer - Casualty

Producer - Title

Producer - Personal Lines

Please note: if you would like more information about a field, you can click the blue question icon.

### New Course Submission

Form Type ? Course Title ?

Select Form Type ▼

On the New Course Submission screen, enter the details of the new course. All fields are required.

1. Select a form type from the Form Type dropdown. The options are:
  - NAIC
  - LDOI
  
2. Enter the complete, unabbreviated course title in the Course Title field.
  
3. Select an instruction method from the Instruction Method dropdown. The options are:
  - Classroom/Lecture
  - Self-Study - Correspondence
  - Self-Study - Web-based
  - Professional Association
  - Seminar
  - Web-based Seminar (Webinar)
  
4. Select a completion method from the Completion Method dropdown. The options are:
  - Attendance
  - Final Exam – Supervised
  - Final Exam – Unsupervised
  - Other
  
5. Enter a detailed description of the course objective and the subject matter that will be covered during this course in the Course Description field.

The screenshot shows a web browser window with a dark header. On the left, it says "Continuing Education Module" with a question mark icon. On the right, it shows the email "jvernon@ldi.state.la.us" and the text "This is a Test Company", along with a red "Close This Tab" button. The main content area is titled "New Course Submission". It contains four rows of input fields: "Form Type" (a dropdown menu with "Select Form Type" and a blue arrow pointing to it), "Course Title" (a text input field), "Instruction Method" (a dropdown menu with "Select Instruction Method"), and "Completion Method" (a dropdown menu with "Select Completion Method"). Below these is a "Course Description" text area.

## CONTINUING EDUCATION MODULE

6. In the License Type section, select the license/line type(s) that corresponds with the subject matter of the course you are filing.

### License Type

Choose the license/line type that corresponds with the subject matter of the course you are filing (ex. If the subject matter of your course is Bail, please select Bail. DO NOT select all license types if your course does not contain subject matter from that category).

- |   |  |
|---|--|
| <input type="checkbox"/> Producer - Life                            | <input type="checkbox"/> Adjuster                  |
| <input type="checkbox"/> Producer - Accident and Health or Sickness | <input type="checkbox"/> Producer - Casualty       |
| <input type="checkbox"/> Producer - Property                        | <input type="checkbox"/> Producer - Title          |
| <input type="checkbox"/> Producer - Bail                            | <input type="checkbox"/> Producer - Personal Lines |

7. In the Subject Type section, enter the number of hours that you are requesting for this course for each subject type.

### Subject Type

Credit hours are awarded in hour increments only. List the number of hours that you are requesting for this course.

Subject Type	Subject Hours
General Insurance Principles	<input type="text" value="0"/>
Ethics	<input type="text" value="0"/>
Long-Term Care Insurance	<input type="text" value="0"/>
Annuities	<input type="text" value="0"/>
Total Subject Hours: 0	

In the Offering Type/Participation section, enter the details of how the course will be offered.

8. Select if the presentation will be open to the public. The options are:

- Yes
- No

9. Select the offering type. The options are:

- One-Time Offering
- Continuous Offering

10. Enter the cost of the course offering for participants in the Cost to Participant field.

### Offering Type/Participation

Is this presentation open to the public?

Yes

No


Offering Type

One-Time Offering

Continuous Offering

Cost to Participant

\$





11. In the File Upload section, attach all required documentation. The documents you are required to attach is dependent on the type of form and the instructional method of the course.

- If you selected LDOI for the form type, you are required to attach:
  - Timed Course Outline
  - Course Content Material
- If you selected NAIC for the form type, you are required to attach:
  - Timed Course Outline
  - Home State Approval
- If you selected Classroom/Lecture as the instructional method, you are required to attach:
  - Timed Course Outline
  - Schedule Course Offering
- If you selected Self-Study (Correspondence or Web-based) as the instructional method, you are required to attach:
  - Timed Course Outline
  - Student Participation Statistics
  - Student Identity Verification
  - Log In Credentials
  - Student Technical Support
  - Exam Access Restriction
- If you selected Professional Association as the instructional method, you are required to attach:
  - Timed Course Outline
- If you selected Seminar or Webinar as the instructional method, you are required to attach:
  - Timed Course Outline
  - Schedule Course Offering


### File Upload

? All course submissions must include a detailed timed outline. For NAIC Reciprocity filings, a copy of home state course approval must also be included. For all other filings, please refer to the application checklist for guidance on what items are required for your submission.

Please click here for a list of [required](#) attachments.

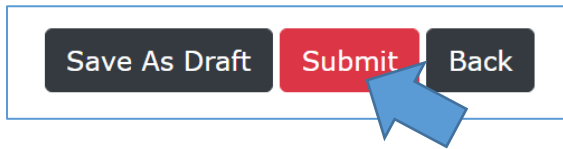
All requested information must be submitted through the Industry Access Portal. Please do not email any application materials directly to this office.

Please Select a Document Type Before Uploading ▼

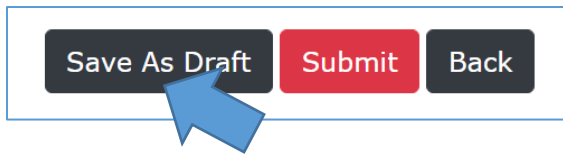


Drop files here to upload

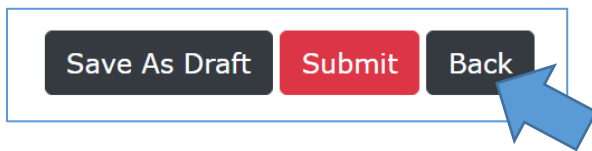
Once you have entered all required information into the fields on the New Course Submission screen and are ready to submit the new course for approval, click the “Submit” button. The new course will be submitted to the LDI for review.



If you have begun entering information for your course submission but are not yet ready to submit it for approval, you can click the “Save As Draft” button to save a draft that you can return to later.



If you would like to return to the previous screen without saving any information, click the “Back” button.



## Existing Courses

The Existing Courses grid displays all courses that are currently active or recently expired.

You can sort the courses displayed in the grid in by ascending or descending order by clicking on any of the grid headers. You can also filter the courses displayed in the grid by clicking the filter icon on any of the grid headers and entering the desired criteria.

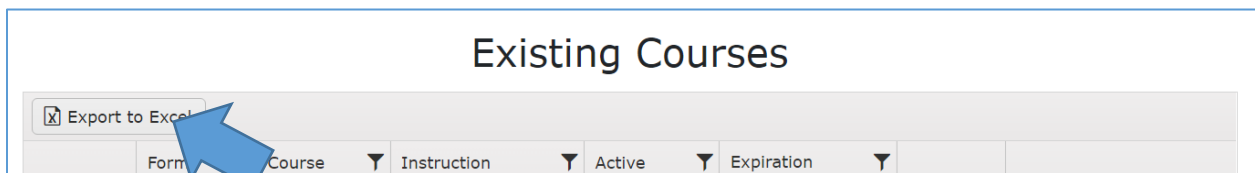
**Existing Courses**

<input type="checkbox"/> Export to Excel							
	Form Type	Course Title	Instruction Method	Active Date	Expiration Date	Status	Action(s)
<a href="#">View</a>	LDOI	qwertyuiop	Self-Study - Correspondence		11/09/2024	Active	
<a href="#">View</a>	NAIC	TEST TITLE	Professional Association		11/09/2024	Active	
<a href="#">View</a>	LDOI	33242343423	College	10/06/2021	10/06/2024	Denied	
<a href="#">View</a>	LDOI	test test test t	Classroom/Lecture	10/05/2021	10/05/2024	Active	<a href="#">Schedule New Offering</a>
<a href="#">View</a>		Du Hoang	Classroom/Lecture	10/01/2021	10/01/2024	Active	<a href="#">Schedule New Offering</a>
<a href="#">View</a>	LDOI	waht a test	Classroom/Lecture	07/07/2021	07/07/2024		<a href="#">Schedule New Offering</a>
<a href="#">View</a>	LDOI	tetttt	Classroom/Lecture	07/05/2021	07/05/2024	Active	<a href="#">Schedule New Offering</a>
<a href="#">View</a>	LDOI	testttttt	Classroom/Lecture	07/05/2021	07/05/2024	Active	<a href="#">Schedule New Offering</a>
<a href="#">View</a>	LDOI	This is not a Bail Course yes it is	Self-Study - Web-Based	07/15/2020	07/15/2023	Active	
<a href="#">View</a>	LDOI	Bonding Your Bail Test	Classroom/Lecture	07/07/2020	07/07/2023	Active	<a href="#">Schedule New Offering</a>

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## Export to Excel

To export the data in the Existing Courses grid to Excel, click the “Export to Excel” button. An Excel spreadsheet containing the data will open.



### View Course

To view a course that is currently active or recently expired, click the “View” button. The Course screen will open. Please note that the course will be in view-only mode and that you cannot edit any fields.

Existing Courses								
<input type="checkbox"/> Export to Excel								
	Form Type	Course Title	Instruction Method	Active Date	Expiration Date ↓	Status	Action(s)	
<a href="#">View</a>	LDOI	Bail ONLY	Classroom/Lecture	07/07/2020	07/07/2023	Active	<a href="#">Schedule New Offering</a>	

### Renew Course

To renew a course that will expire soon, click the “Renew” button. The Course screen will open. Please note that the course will be in view-only mode. You will only be able to add new uploads to the Attachments section and communicate with LDI staff in the Correspondence section.

<a href="#">View</a>	NAIC	Test123	Employee		10/13/2021		<a href="#">Renew</a>	
<a href="#">View</a>		emergency	Classroom/Lecture	05/05/2014	10/01/2021	Active	<a href="#">Renew</a>	

### Schedule New Course Offering

To schedule a new offering of a course, click the “Schedule New Offering” button. A grid for the selected course will open.

Existing Courses								
<input type="checkbox"/> Export to Excel								
	Form Type	Course Title	Instruction Method	Active Date	Expiration Date ↓	Status	Action(s)	
<a href="#">View</a>	LDOI	Bail ONLY	Classroom/Lecture	07/07/2020	07/07/2023	Active	<a href="#">Schedule New Offering</a>	

Click the “Add new record” button.

CE Course Administration Module [?](#) jvernon@ldi.state.la.us  
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### Course Title: Bail ONLY

[+ Add Course Offering](#)[Export to Excel](#)

Start Date	Start Time	End Time	Location Address	City	State	Zip	Action(s)
No records were found.							

◀ 0 ▶10 items per pageNo items to display

[Back](#)

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The Edit window will open.

#### Program Presentation Schedule ✕

### Schedule Information

Provide the requested information for the scheduled presentation of the program.

**Start Date**

📅 ⌚

**End Date**

📅 ⌚

**Location Address**

**City**

**State**

Select a state ▼

**Zip**

✔ Submit ⊗ Cancel

## CONTINUING EDUCATION MODULE

Enter the required information into the fields. The fields are:

- Id
- Course Id
- Start Date
- End Date
- Street
- City
- State
- Postal Code

Once you have entered the required information into the fields, click the “Submit” button.

Program Presentation Schedule

### Schedule Information

Provide the requested information for the scheduled presentation of the program.

Start Date: 12/1/2021 9:30 AM

End Date: 12/1/2021 4:00 PM

Location Address: 123 Test Street

City: Baton Rouge

State: Louisiana

Zip: 70810-\_\_\_\_