Continuing Education Module

CONTINUING EDUCATION MODULE

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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.

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.
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.

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.

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

The Add New Course Submission screen will open.

Please note: if you would like more information about a field, you can click the blue question icon.
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.
6. In the License Type section, select the license/line type(s) that corresponds with the subject matter of the course you are filing.

7. In the Subject Type section, enter the number of hours that you are requesting for this course for each subject type.
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:
   o Yes
   o No

9. Select the offering type. The options are:
   o One-Time Offering
   o Continuous Offering

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

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.
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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.

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.

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.
Click the “Add new record” button.

The Edit window will open.
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.