

# MICHIGAN OFFICE OF FINANCIAL AND INSURANCE REGULATION

## Continuing Education Course Roster Guide for Prometric's Secure Web site

This guide will walk you through the steps of getting to our site, setting up an account and processing your course rosters.

With this service:

- Fees are \$1.00 per credit/per name and collected as rosters are input with a Visa, MasterCard or American Express only.
- Only 7-digit System ID (license) numbers are used for producers – not Social Security numbers.
- Certificates of Course Completion for students may be printed.
- Roster data will be transmitted to Michigan's records DAILY.

### LET'S GET STARTED!

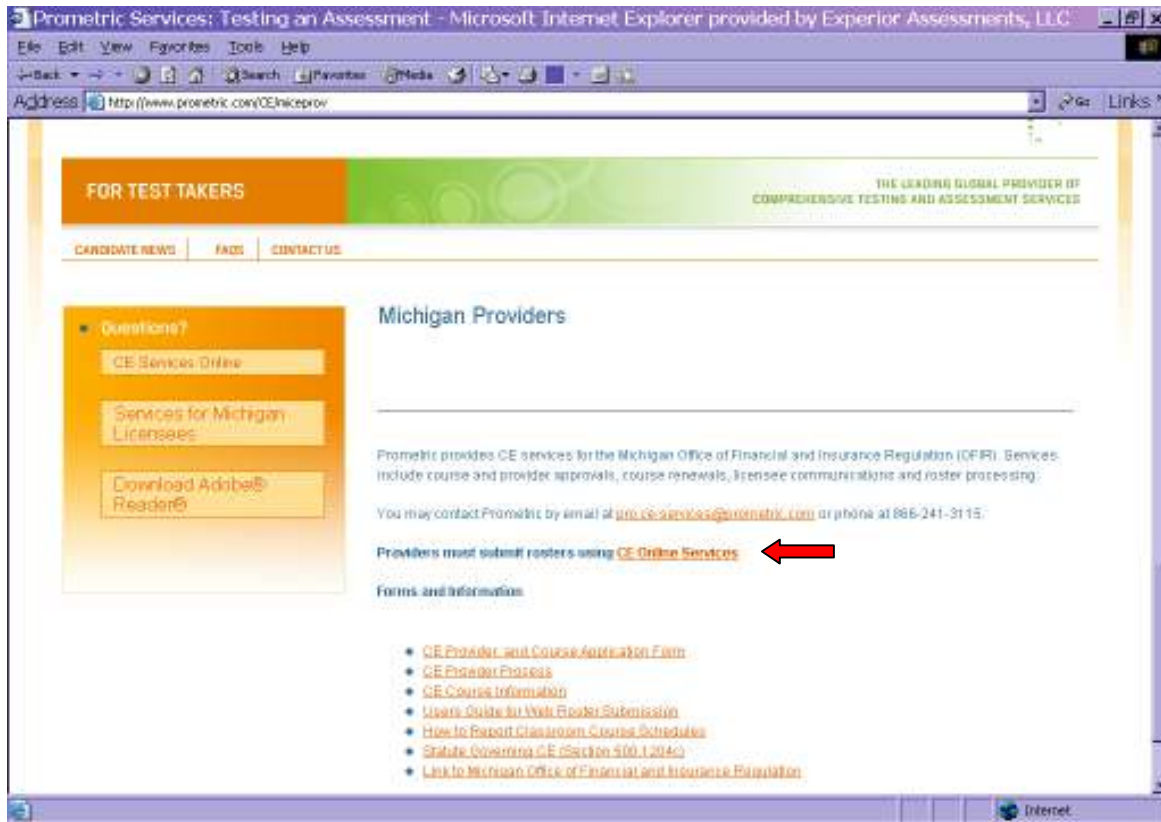
[www.prometric.com](http://www.prometric.com)

#### Pre-Licensing | Continuing Education

Under Choose a State go to **Michigan Provider Services**

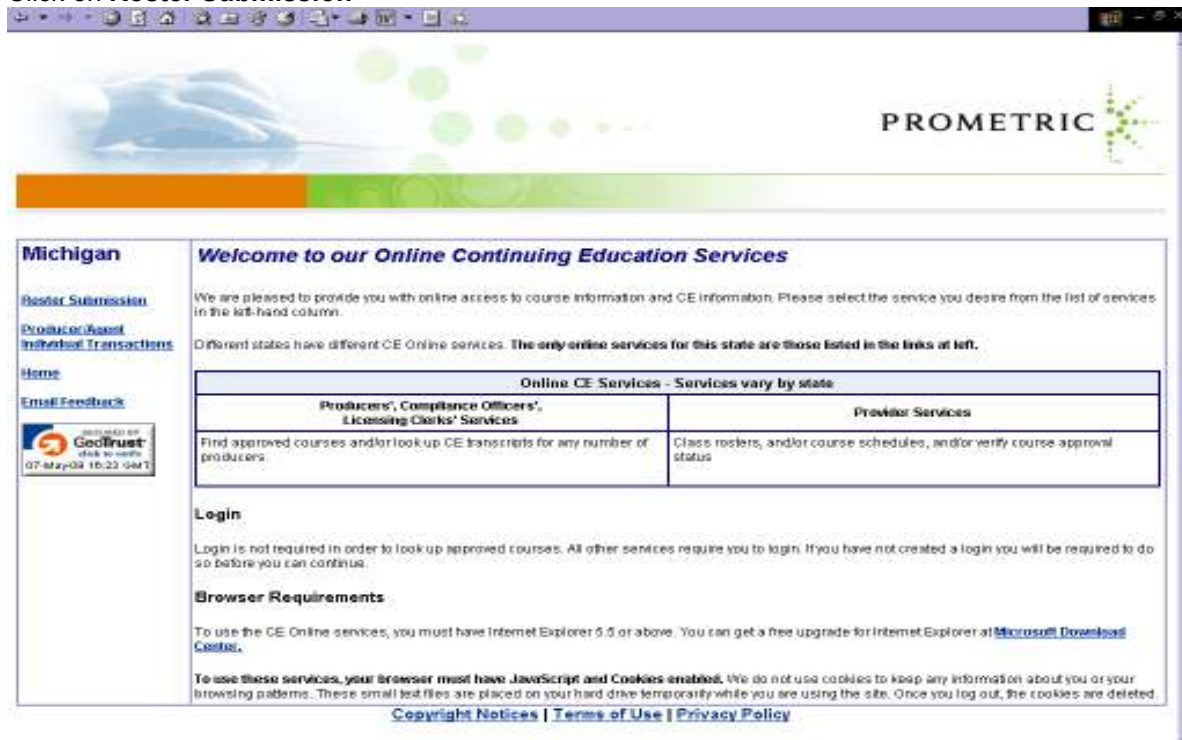
The screenshot shows a Microsoft Internet Explorer browser window displaying the Prometric website. The address bar shows <http://www.prometric.com/default.htm>. The website header includes the Prometric logo and the tagline "THE LEADING GLOBAL PROVIDER OF COMPREHENSIVE TESTING AND ASSESSMENT SERVICES". Below the header, there is a section for "IMPORTANT NEWS" with a link to "Test center update for candidates". The main content area is divided into three columns. The left column, titled "FOR TEST TAKERS", contains a dropdown menu for selecting a test type (Academic, Professional, Government & Corporate, Information Technology (IT), State, County and Local Government, All) and a "Pre-Licensing | Continuing Education" section with a "Choose a State" dropdown menu. The right column contains two sections: "FOR PROMETRIC TESTING SOLUTIONS" and "FOR NETWORK PARTNERS AND TEST CENTERS", each with an "ENTER" button. The bottom of the browser window shows the address bar with <http://www.prometric.com/CElicsprov> and the Internet Explorer logo.

The Michigan Provider's screen displays general information. On the left side of the page or in the body of the page, you can click on CE Online Services for roster processing.



The Michigan Online Continuing Education Services screen displays the various services offered, on the left side of the page.

Click on Roster Submission



At this point, you will be required to set up a User ID and password. Click on **Click to Set Up a New User Account**, on the right side.

**Michigan**

[Home](#)  
[Email Feedback](#)

**Services Requiring Login Accounts**

**Existing Login Accounts**  
For security reasons, you must change your password every 6 months.

User Name:   
Password:

**Maintaining Existing Login Accounts**

Change the password of my account:   
Display my account's password hint:   
Change the user name of my account:

**First Time User? Login Expired?**  
To use the services listed on the left (except Approved Course List), you must have a login account.

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Here you will create:

- **User Name** (a minimum of 6 characters) (we recommend writing this down in a safe place)
- **Password** (a minimum of 6 characters) (we recommend writing this down in a safe place)
- You will need to **re-enter your password**
- Type in a **password hint** that will help you remember your password.

**Michigan**

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**Create a New Login Account**

You will be using the User Name and Password combination to enter Online Services. Enter the information requested below to create your login account. All fields are required.

For security reasons, you must change your password every 6 months.

User Name:  Create a user name you will remember using **only** the characters a-z and/or 0-9 and must be a minimum of 6 characters. Do **not** use spaces. User name is not case sensitive.

Password:  Password has the same rules as the User name but must be at least 6 characters long.

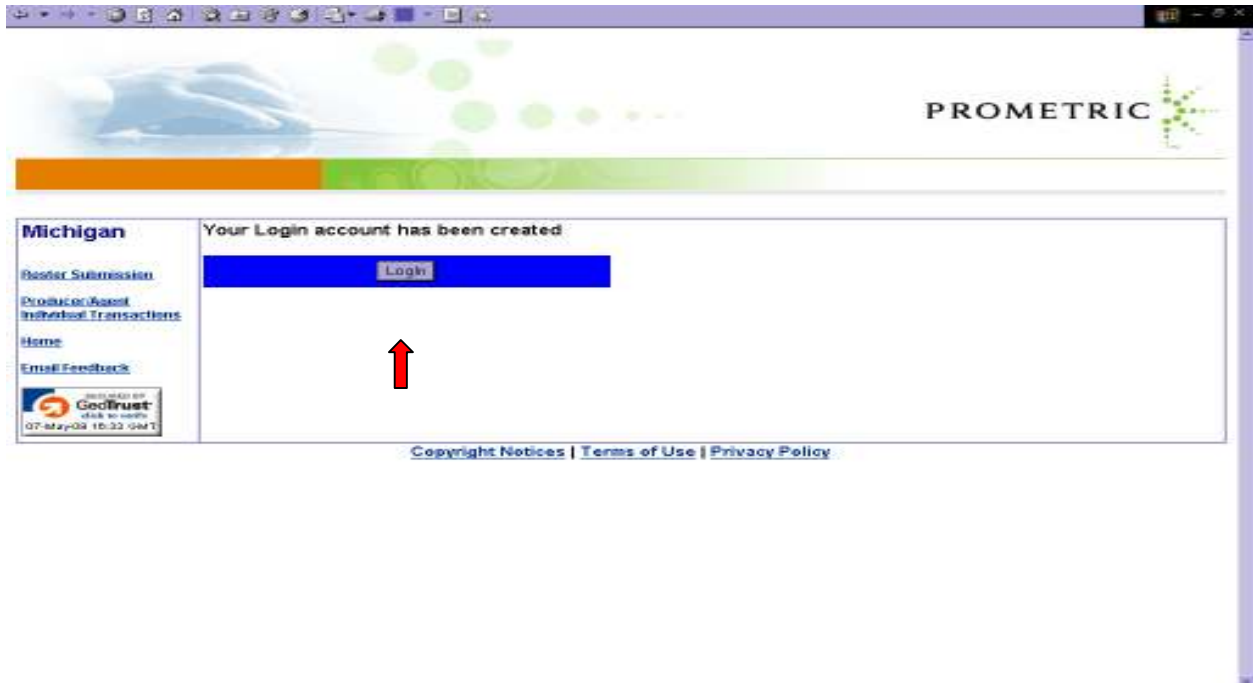
Re-enter password:

Password Hint:  Create a password hint or phrase to be displayed when you forget your password. The hint must **not** contain the password and must be something another person couldn't figure out easily.

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When all three fields are filled in, click on **Continue**.

When your Login account has been created, this screen will display. Now click on **Login**.



You will be directed back to the Login screen where you will enter your newly created **User Name** and **Password** under **Existing Login Accounts**. Then click on **Login**.



**Important things to remember once you have created your account:**

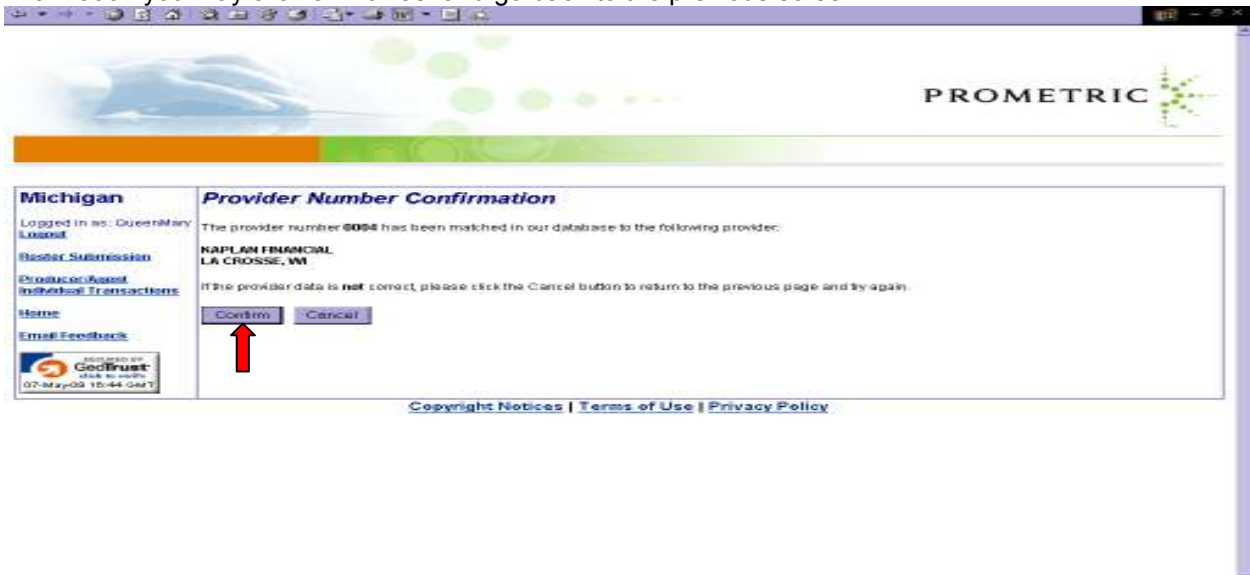
- Your login is linked to your 4-digit Michigan provider number
- Your password expires every three months
- You can maintain your login account, change your password before it expires, display your password hint or change the user name of the account.
- Once your account is created and you return at a later time to Prometric's Web site, you will just enter your User Name and Password at the login screen. You will not need to create a new account unless:
  - A. Your account has expired; or
  - B. You forgot your User Name/Password

**Be sure to use your Michigan provider number, not your provider number for any other state's program.**

On this screen, enter in your 4-digit provider number and click on **Continue**.



A confirmation screen will display your information. Click on **Confirm**, or if you entered the incorrect information you may click on **Cancel** and go back to the previous screen.



Now you are ready to enter rosters. Please have your credit card available.

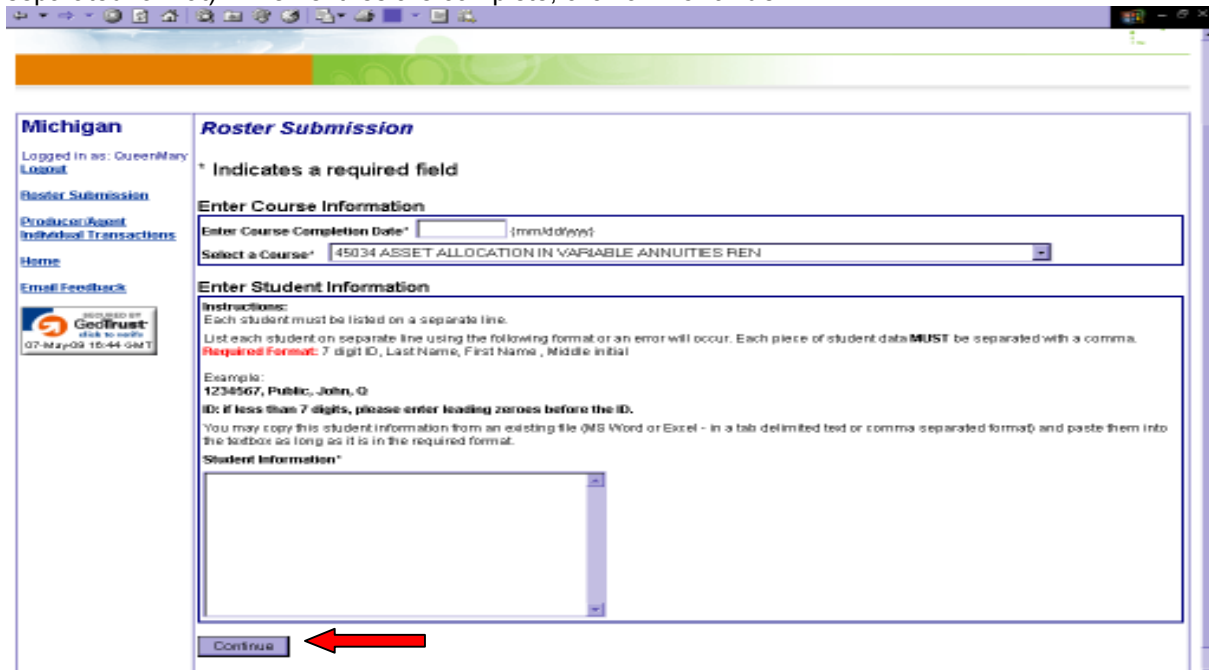
Select Michigan from the drop down menu.



On the screen **below** you will:

- Choose the proper course from the drop down menu
- Enter the course completion date
- Enter the 7-digit Michigan System ID (license) number (not SSN), Last Name, First Name and Middle Initial for each attendee (remember: the way the name is entered will be how it will display on the Individual Completion Certificate)
- **The full last name and System ID number must match the student's record exactly.**
- Use the OFIS Licensee Lookup feature to verify last names and System ID numbers. The site is [http://www.cis.state.mi.us/fis/ind\\_srch/ins\\_agnt/insurance\\_agent\\_criteria.asp](http://www.cis.state.mi.us/fis/ind_srch/ins_agnt/insurance_agent_criteria.asp)

You may copy and paste from an existing file (MS Word or Excel in tab delimited text or comma separated format). When entries are complete, click on **Continue**



While the system validates your roster and once it has completed the process, click on **Continue**.



If there are System ID or Names that do not match what Michigan has you will receive a screen like the one below that indicates the entries that are invalid. At this point you may go back to make corrections or delete the invalid entries:



Once your corrections or deletions are done (if you had any), the **Roster Preview** will display the student(s), course and fee information. At the bottom, the following options will display: **Go Back** (to Make Changes), **Submit Another Roster** or **Charge It**. *Please have your credit card ready to complete the transaction.*

**PROMETRIC**

**Michigan**  
 Logged in as: QueenMary  
[Logout](#)  
[Roster Submission](#)  
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**Roster Preview**

**Course Information:**  
 Course Number: 51688  
 Course Title: ADVANCED IRA ISSUES (2nd EDITION) 2009  
 Number of Credits: 3  
 Course Completion Date: Friday, May 01, 2009

**Student Information:**  
 All entries with duplicate IDs have been removed.  
 Review your entries carefully. Fees are not refundable. Re-submissions due to entry errors will require a new fee.

ID	Last Name	First Name	Middle Initial
0005981	Detrick	William	

**Fee Information:**  
 The charge for this submission is **\$3.00** (\$1.00 per credit per student).

**Go Back** Returns to the previous page to make any necessary corrections and re-submit.

**Submit Another Roster** Saves current roster and allows another to be submitted.

**Charge It** Saves all submitted rosters and proceeds to credit card process for all submitted rosters.

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The **Charge It** screen itemizes the payment information. Verify the information is correct and then click on **Pay Now** to complete the transaction.

**PROMETRIC**

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**Payment Information**

Submit Batch	Course Number	Course Completion Date	Fee
1	51688	5/1/2009	\$3.00
			Total fee: <b>\$3.00</b>

Card Type:   
 Card Number:   
 Full Name on Card:   
 Expiration Month:  Expiration Year:

**Pay Now** Fees are nonrefundable.

Note: You will lose all roster data you submitted if you do not click "Pay Now".

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When your credit card is approved, this **Roster Submission Confirmation** page displays. *Please print the page as a receipt.* You may also print a **Roster Summary Report** or **Individual Completion Certificates** for the students submitted. *Keep in mind this is the ONLY time either option is available.* You may also **Submit Another Roster**.

**PROMETRIC**

**Michigan**


Logged in as: QueenMary  
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 VERIFIED BY  
**Godfrust**  
Berkshire Corp.  
ALLIANCE 07/05/08 11:01 UTC

**Roster Submission Confirmation**

State	Michigan
Provider Number	0004
Submission Date	5/7/2009

The credit card charge transaction has been approved. A charge of \$3.00 has been applied to your credit card.

The confirmation number for this charge is W00218002. Please refer to this number in any correspondence regarding this transaction.

**This is your receipt. We strongly suggest you print this page for your reference.**

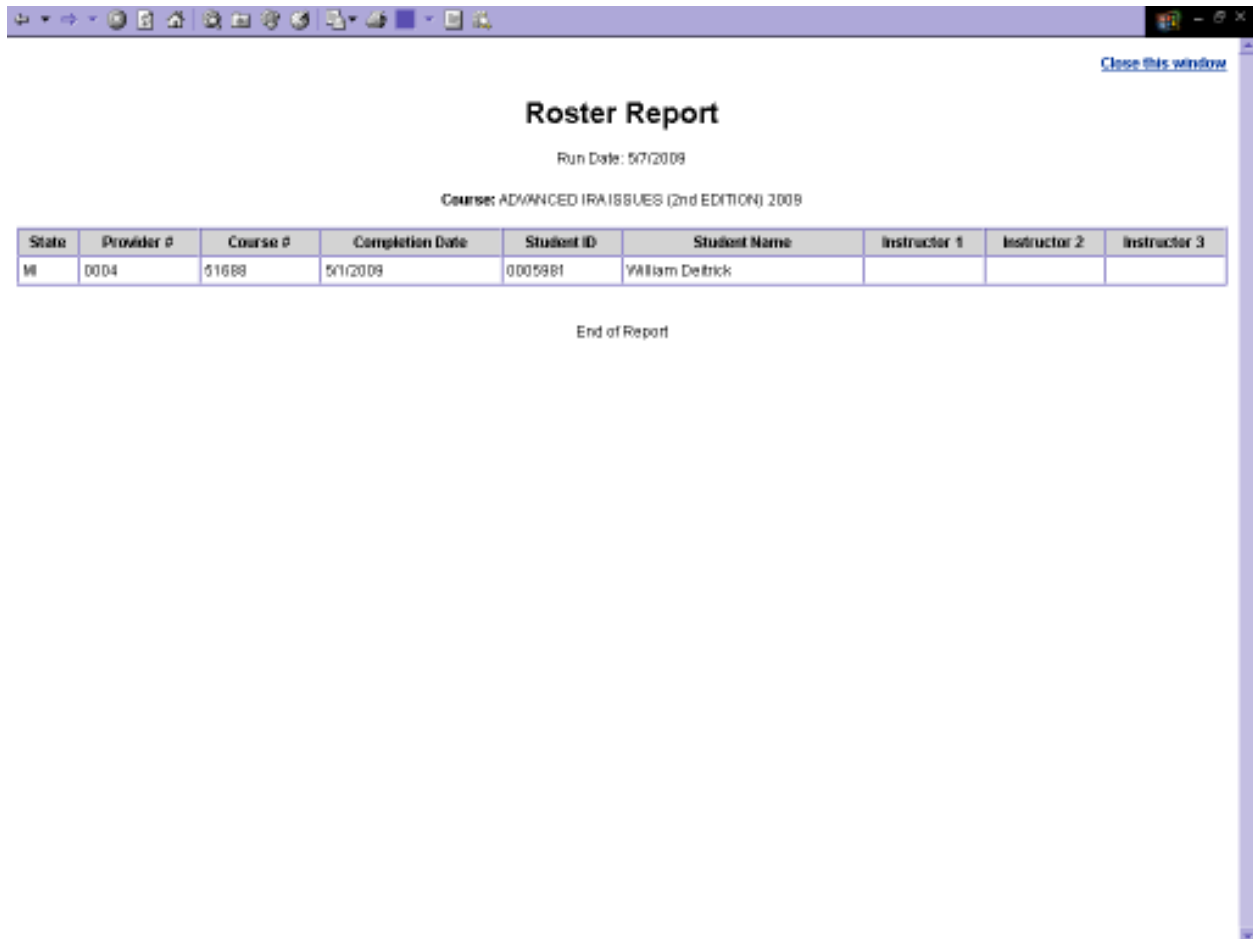
[Print Roster Summary Report](#) – This is the only time this option will be available

[Print Individual Completion Certificates for the Roster](#) – This is the only time this option will be available

[Submit Another Roster](#)

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## Sample Roster Summary Report



[Close this window](#)

### Roster Report

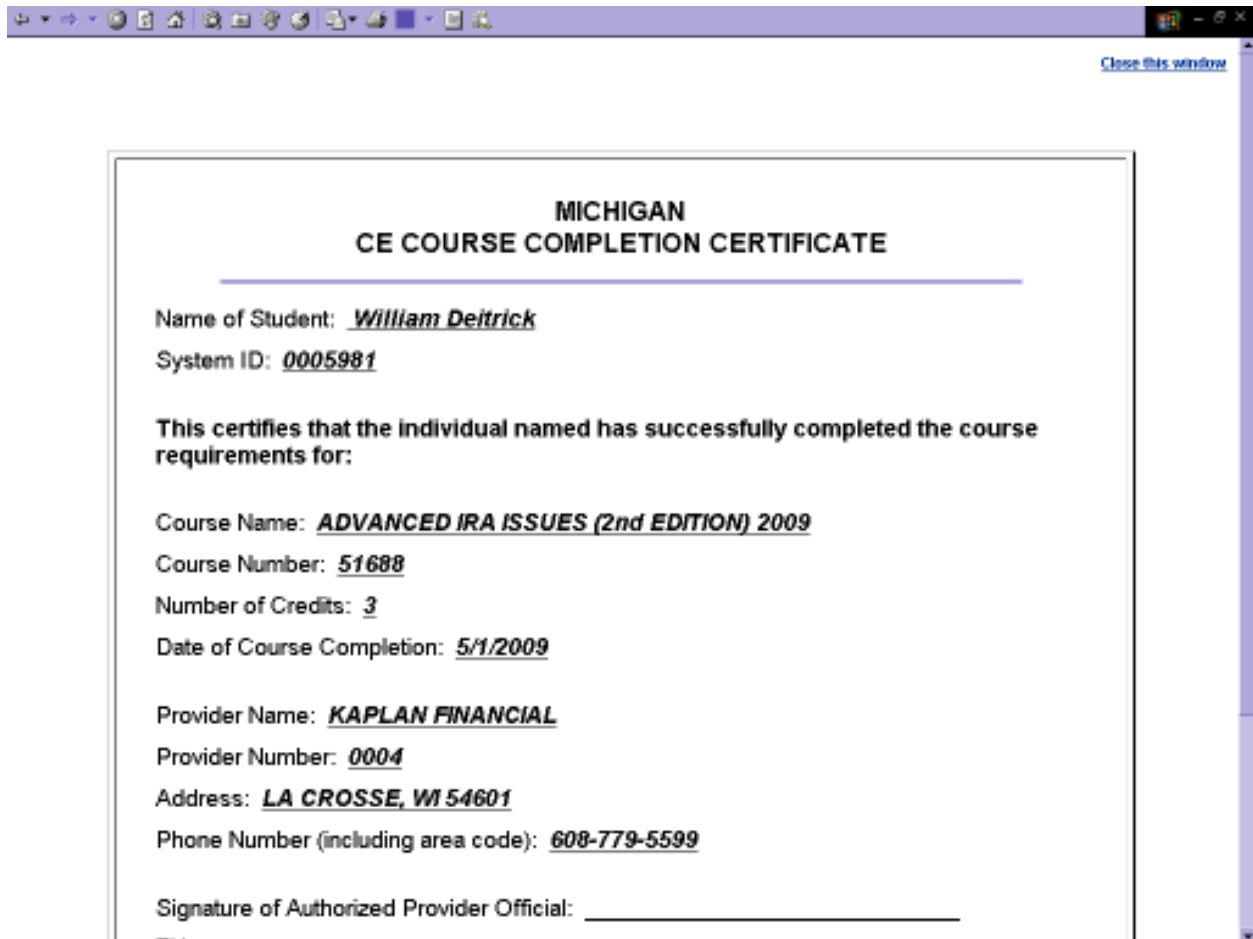
Run Date: 5/1/2009

Course: ADVANCED IRAISSUES (2nd EDITION) 2009

State	Provider #	Course #	Completion Date	Student ID	Student Name	Instructor 1	Instructor 2	Instructor 3
MI	0004	51688	5/1/2009	0005881	William Detrick			

End of Report

**Sample** of an Individual Completion Certificate



The image shows a screenshot of a web browser window. The browser's address bar and toolbar are visible at the top. The main content area displays a certificate titled "MICHIGAN CE COURSE COMPLETION CERTIFICATE". The certificate is enclosed in a rectangular border. The text on the certificate is as follows:

**MICHIGAN  
CE COURSE COMPLETION CERTIFICATE**

---

Name of Student: William Deitrick  
System ID: 0005981

**This certifies that the individual named has successfully completed the course requirements for:**

Course Name: ADVANCED IRA ISSUES (2nd EDITION) 2009  
Course Number: 51688  
Number of Credits: 3  
Date of Course Completion: 5/1/2009

Provider Name: KAPLAN FINANCIAL  
Provider Number: 0004  
Address: LA CROSSE, WI 54601  
Phone Number (including area code): 608-779-5599

Signature of Authorized Provider Official: \_\_\_\_\_

As always, if you have any questions or comments, please contact us at [pro.ce-services@prometric.com](mailto:pro.ce-services@prometric.com)