

**Ohio Department of Insurance
Continuing Education Program**



Provider Information Packet

Administrative Services Provided by Prometric

PROMETRIC™

October 2008

Ohio Department of Insurance Continuing Education Program Provider Information and Application Packet

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Ohio Department of Insurance Continuing Education Program Introduction

The State of Ohio has contracted with Prometric to perform continuing education (CE) provider and course review services on behalf of the Ohio Department of Insurance (the Department). Prometric handles all transactions and inquiries for approving providers and courses. Prometric also handles roster and schedule submissions, calculates compliance and provides transcripts to agents. Prometric has arranged for Web-based transactions to be handled through SIRCON® (www.sircon.com). This includes submissions of rosters, course schedules, approved course lists and transcript lookups. **The Department processes all transactions relating to agent name and address changes, license renewals and letters of certification.**

Classroom course offering schedules must be submitted. See Page 28 for the form and the details. Prometric conducts in-person, on-site audits based on course offering schedules as well as on matching schedules against rosters. Providers may enter, edit and view course offering schedules using SIRCON®.

Providers may call Prometric at **800.742.8732** for information. Agents should call **800.532.2170** for information. Prometric's service staff for agents is available to handle calls from 8:00 A.M. to 6:00 P.M. Eastern time, Monday through Friday.

In addition to classroom and self-study courses, Ohio has a separate and distinct course type: Interactive Online. See Page 7 for a detailed description of the requirements for this course type.

Agent Credit Requirements

Twenty credit hours are required each two-year compliance period ending December 31 with two exceptions: (1) agents holding only a title license must complete only 10 credits of title specific courses and (2) agents holding only a Bail Bond license must complete 14 credits of Bail Bond related credits. An agent holding a Bail Bond license authority in addition to a PC authority must complete 14 of the required 20 credits from Bail Bond courses. The special Bail Bond requirements will take effect for the first full two-year compliance period after the Bail Bond license is issued or the Bail Bond line of authority is added.

Ohio non-resident agents who have met the CE requirements in their home state, agents who hold only a Limited Authority license, or agents who have been granted inactive status by the Superintendent are exempt from CE requirements.

Fees: Providers must select fee status at start of year; if a provider changes its status during the year and a different fee is due, the new fee will be in addition to previous payments with no credit for the prior payments:

Flat fee	\$1,000 annually with unlimited course submissions
Individual fee	\$100 per provider and \$40 per course annually
Limited fee	\$25 per provider and \$25 per course annually with a limit of 3 courses of no more than 3 credits each
Rosters	\$1 per credit per student

Use the Fee Worksheet on Page 29 to prepare your payment.

All payments may be made using American Express, Visa or MasterCard.

Prometric will send provider and course renewal notices each year in October for the following year.

More information, including the material in this packet, is available at our Web site: **www.prometric.com**. Any of the materials in this packet may be photocopied.

For further information, contact Prometric:

Phone: **800.742.8732**
Fax: **800.735.7977**
E-mail: **Pro.ce-services@prometric.com**
Web site: **www.prometric.com**

Ohio Department of Insurance Continuing Education Program Requirements

These requirements have been adopted by the Ohio Department of Insurance.
See Page 9 for information about violations and penalties.

General Program Information and Requirements

1. All requests for course approval must be submitted at least 30 calendar days in advance of the requested approval date.
2. All requests for provider and course renewals must be submitted by November 15 of each year.
3. Providers must make their refund policy and course materials (outlines, syllabi, handouts, etc.) available to students.
4. If an approved course is canceled or a student cancels in advance, the provider must refund all fees within 45 days of the cancellation unless a different refund policy is printed on the provider's materials.
5. The class must be held in a facility that complies with the Americans with Disabilities Act.
6. For courses/programs of instruction to qualify, they must:
 - be offered by an approved provider;
 - contribute to the professional competence of an agent;
 - be submitted using the appropriate application form and with the appropriate fee for each course;
 - have significant intellectual or practical content to enhance and improve the insurance knowledge of the participants;
 - use the most recent forms filed in Ohio, editions and laws to the extent possible;
 - include methods which will be employed by the provider for the improvement of the course;
 - include a bibliography of reference sources; and
 - meet all other CE laws.
7. Only courses that have been approved by Prometric may be offered for Ohio CE credit. **No course may be conducted for credit until it has been approved.**
8. **Partial credit may be awarded for partial attendance at a classroom course at the discretion of the provider.** Rosters for such situations must be submitted in hard copy indicating the student and the number of credits to be awarded. The full normal fee for the course must be submitted. Credits must be rounded down and in one-hour increments. The provider's refund policy must disclose the policy on partial credit. A provider is not required to provide partial credits.
9. No course may be advertised or otherwise promoted as appropriate for Ohio CE credit until it has been approved in writing.

10. Promotional or advertising material to be used must be submitted with the course application. The advertisement shall include:
 - the provider name and course title as they appear on the application for provider approval;
 - the number of Ohio-approved CE credit hours;
 - whether an exam is required in order to receive CE credit;
 - no guarantees that the student will pass a required exam;
 - the level of difficulty (introductory, intermediate or advanced);
 - no false, deceptive or misleading statements; and
 - the provider's refund policy.

The submission must also include information about the experience and qualifications of each instructor. In lieu of including this information in the materials, a provider may make it available upon request to any person.
11. Once approved, a course may not be substantially altered. A substantial alteration is any change that would modify the content or time allocations stated in the course syllabus or would change any of the course topics.
12. Providers may not change a course's content or outline without prior written approval. Failure to obtain written approval in advance of the course may result in a denial of CE credit for the course.
13. Fifty minutes will qualify for one CE credit hour. Breaks, introductions, lunches, announcements or other non-instruction time do not qualify for CE credit.
14. Each course must be a minimum of one credit hour and in increments of whole or one-half credit hours.
15. Providers must agree to inform Prometric of the date, time and location of each classroom session, conference or convention at least 15 days prior to presenting. Further, Prometric must be notified immediately when a change is made in date, time and/or location. Failure to inform Prometric may result in courses being denied approval or current approvals being revoked.
16. Providers must maintain accurate attendance records for each course. The agent's National Producer Number (not SSN) is required in order that rosters can be submitted. Providers should not collect or maintain records of Social Security numbers. Only students meeting minimum attendance requirements may receive credit for course completion.
17. Providers are required to report course completion rosters, within 15 calendar days of course completion, to Prometric. The roster must include the name and National Producer Number (NPN) of each agent. Providers must distribute course completion certificates to all individuals who meet the requirements of the CE course within seven days of the conclusion of a course. The certificate must contain the name and identification number of the agent, the name and identification number of the course, the date(s) the course was held, the number of credit hours completed by each agent, and the name and identification number of the provider.
18. Agents will earn credit only once for a course completed in the current compliance period regardless of the number of times the same course is taken. However, the agent may take the same course again and receive credit once in a subsequent compliance period.
19. The authorized provider official is responsible for verifying that instructors meet the required minimum qualifications. Instructors must meet one of the following qualifications: 1) hold a post-graduate degree in insurance or a related field or one of the following professional designations: CLU, ChFC, FLMI, LUTCF, CPCU, CIC, RHU, or REBC; 2) have four years of experience as a full-time employee or licensed agent interpreting or explaining insurance policy contracts and in addition, hold one of the following designations: CEBS, CLTC, CSA, LUTC Graduate, FIC, AU, INS, AAI, AIC, ARM, AIPA, AIM, ALCM, APA, ARP, AIAF, AMIM,

AAM, ARE, or AFSB or hold an associate's or bachelor's degree with a specialization in insurance; or 3) seven years of relevant experience.

20. Providers must verify each instructor's relevant qualifications and provide evidence of such qualifications to the Department upon request. Instructor information does not need to be submitted to Prometric for approval.
21. Course providers must agree that representatives of Prometric and/or its designees, and employees of the Department and/or its designees, in an official capacity, may audit classroom course instruction, course materials, instructors' presentations, course records, records of examination, attendance rosters and other aspects of instruction. These auditors will not be interfered with while conducting or attempting to conduct an audit. Audits will be conducted with a minimum of disruptions. Providers agree that auditors may attend any course offered for the purpose of the audit without paying any fee. Providers grant Prometric and the Department the right to audit and/or inspect these records at the premises of the provider or at the physical location of these records.
22. Providers must be able to verify who attended and completed each course for a minimum of four years following the completion of a course.
23. Providers must keep all records pertaining to their Ohio CE activities for a minimum of four years.
24. A list of approved courses is available at sircon.com.
25. Instructors:
 - must be knowledgeable in the subject in which they teach a course;
 - may only instruct in their line of expertise;
 - may receive credit only once during a compliance period for a course which they teach. However they may be awarded double the course credits. The roster fee must match the number of credits awarded.
 - insurance company trainers as instructors must be full-time salaried employees of the insurance company sponsoring the courses and must have, as part of their full-time responsibilities, the duty to provide insurance company training; and
 - college and university instructors may be full-time or adjunct faculty of the accredited college or university, must be teaching a curriculum course in his or her field of expertise and must meet the requirements of the association that accredits the college or university.

Qualifying/Non Qualifying Course Subjects

26. **The following subjects/topics may qualify:** ethics in insurance, legal, legislative, regulatory matters in insurance, fundamentals/principles of property and casualty insurance, fundamentals/principles of life and health insurance, estate planning and/or taxation, insurance policy contents, proper use of insurance products, insurance rating/underwriting/claims, accounting/actuarial considerations in insurance, principles of risk management, provisions/differences in insurance policy contracts, fundamentals/principles of title insurance, managed care, agency management, legal/ethical issues involving sales practices, surety bail bond, rating, tax laws related to insurance, technical information related to the insurance license, errors and omissions, estate planning/taxation, wills and trusts, financial planning, management content directly related to insurance, actuarial mathematics/statistics/probability, economics, business law, advanced underwriting, employee benefit plans, loss prevention and control, assigned risk, claims procedures, policy replacement, pensions, profit sharing, courses leading to insurance designations, executive compensation, and personnel compensation.

27. **The following subjects/topics may not qualify:** prospecting, motivation, salesmanship, psychology, recruiting, time management, health/stress/exercise courses, supportive office skills, personnel management, use of calculators, computers or other equipment, use of computer software except in computer-based needs analysis or computer solutions to risk management as related to insurance customers, accounting or tax preparation in connection with the business of the producer, meetings held in conjunction with the general business of the producer, courses primarily intended to impart knowledge of specific products or specific insurers if the use of the products relates to sales promotion or marketing of the product, client relations, matters aimed at improving the operation of a person's business, stress management, organizational procedures and internal policies of an individual insurer, and subjects not related to the insurance industry.

Classroom courses

28. Students attending classroom courses in preparation for a professional designation exam may receive credit for the classroom hours or exam but not both.
29. CE credit may now be awarded for organization or association meetings. An approved Ohio CE provider that is affiliated with a national association or organization may file a course application and submit rosters for **annual** association meetings conducted by the **national (not local)** association or organization. The following requirements apply:
- The course application must be submitted **before** the meeting.
 - The provider shall determine the method of attendance verification.
 - No course application fee will be charged but the roster fees must be paid.

Self-study courses

30. Self-study courses must include an examination at a site approved by the provider to receive credit. The proposed exam will be approved with the course. Self-study exams must contain at least 25 questions. The number of questions must increase proportionately as the amount of material increases up to a suggested maximum of 75 questions for very large courses. It is suggested that all questions should be four-alternative multiple choice or completion format and that the use of True/False questions be avoided. All course materials are required to be submitted with the application. Credit hours will be determined by the estimated time it will take a student to study the material, adjusted by the percent of the course content that is acceptable as CE. **Credit will be allowed only if the student receives a grade of 70 percent or greater on the examination.**
31. **Self-study examinations are not required to be proctored.** The student must complete and affidavit certifying that he or she took the exam without assistance of another person.
32. The completion date for a self-study course will be the date the exam was taken and passed.
33. Self-study courses presented via the Internet must adhere to the same requirements as other self-study methods. The same affidavit requirement for students is in effect. Providers must provide Prometric with the means to verify the exam procedures.

Interactive Online Courses

34. Interactive Online has been created as a separate and distinct course type in addition to classroom and self-study. **Interactive Online courses are, by definition, only presented on the Internet and do not require a final exam.** See the requirements on Page 7.

Ohio Department of Insurance Continuing Education Program Interactive Online Courses

The Ohio Continuing Education Program has added Interactive Online as an approved course type. To be approved for this course type, all of the basic requirements listed below must be met. In addition to providing Prometric with the means to view the course on the Internet, you must submit all study materials with the course approval application. The materials may be in the form of paper, diskette, CD or other electronic medium. **This course type does not require a monitored exam.** Your course submission should include documentation showing how the course meets the basic requirements.

Basic Requirements

An Interactive Online Course must:

- Be available 24 hours per day, 7 days per week. Minimal down time for updating and administration will be permitted.
- Have the ability to go back and review any unit at any time.
- Provide clear instructions on how to navigate through the course.
- Provide a course evaluation at the end of the course. The evaluation should include:
 - What the student thinks about the online method of learning?
 - What the student liked the most about online learning?
 - What the student disliked the most about online learning?
 - Would the student recommend online study to others?
 - Open-ended comments/questions.
- Provide automatic bookmarking at any point in the course.
- Provide questions after each unit/chapter. The questions must be answered prior to proceeding to the next unit/chapter. The material can be reviewed while answering questions.
- Submit acceptable methodology of course review.
 - Include reinforcement response when a question is answered correctly (e.g. pop-up screen).
 - Include a response when a question is answered incorrectly. Examples are:
 - Respond with the correct answer and explanation in a pop-up screen;
 - Reference back to the section/screen of the question; etc.
- Provide viewing access to the online course at all times to the Department and Prometric.
- Include information as to the minimum system requirements.
- Include a statement that the student information will not be sold or distributed to any third party without prior written consent of the student. Taking the course shall not constitute consent.
- Provide some type of encryption. All personal information, including credit card number, name and address of the student must be encrypted so that the information cannot be read as it passes across the internet.
- Inform the student and the Department as to the period of time that the course is accessible from the date of purchase and include a disclaimer that "the course is approved only until December 31, xxxx." (This date may be updated upon renewal of the provider and the course.).
- Provide a completion certificate when a course is completed and the provider verified the completion. Electronic certificates are sufficient.
- Students must affirm that they, and only they, completed the course.
- Provide course outline and justification as to the number of credits requested for the course in accordance with Rule 3901-5-03.
- Interactive on-line courses must be designed so as to prevent the student from completing the course in a time unreasonably short when compared to the credit hour total approved for the course.

Desirable items, but not mandatory:

- Include a high level of interactivity (clicking on paths and navigation through an instructional sequence is not representative of interactivity).
- Include graphics that reinforce the content.
- Include the ability to contact an instructor (i.e. automated e-mail).

Ohio Department of Insurance Continuing Education Program Dispute Procedures

A CE provider may dispute a decision regarding a course or provider application. If a disagreement arises, the Department recommends the following procedures be followed in the sequence listed below.

1. Call Prometric and discuss the disagreement with a CE evaluator/auditor, who will discuss the findings and try to resolve the issue by phone.
2. If the dispute cannot be resolved by phone, write to Prometric with the reason(s) for disagreement and reconsideration of the decision. Prometric will respond to the request within 15 business days of receipt. Send requests to:

**Prometric
Attn: Ohio CE Reviews
1260 Energy Lane
St. Paul, MN 55108**

3. If you disagree with Prometric's response to your written request, you should then address your request, in writing, to the Ohio Department of Insurance. State your reason for disagreeing with the Prometric response and include copies of any correspondence. Send your request within 30 days of receiving Prometric's action to:

**License Division — CE
Ohio Department of Insurance
50 W. Town Street, Third Floor – Suite 300
Columbus, OH 43215**

Ohio Department of Insurance Continuing Education Program Violations and Penalties

Pursuant to Rule 3901-5-05 of Chapter 3901-5 of the Ohio Administrative code, the following violations and penalties are established:

- (A) Purpose**—The purpose of this rule is to establish what conduct may be a violation of Ohio statutes and rules that would subject the person to administrative actions.
- (B) Authority**—This rule is issued pursuant to the authority vested in the superintendent under section 3901.041 and 3905.486 of the Revised Code.
- (C) Providers**—The following are violations of the pre-licensing education and continuing education statutes and rules:
- (1) Making any false, misleading or deceptive statement or representation about the status of a CE course approval, the number of hours for which a course is approved, or any other statement about a CE course or provider. The penalty for a single violation is a forfeiture of \$500.
 - (2) The use of an unqualified instructor. The penalty for a single violation is a forfeiture of \$500.
 - (3) Failure to maintain all necessary records for the required time periods. The penalty for a single violation is a forfeiture of \$100.
 - (4) The use, submission or filing of any document for the purpose of complying with the agent education statutes and rules, or in responding to any inquiry from the Department concerning agent education, when the provider knows or should know that the document, or any part of it, is false or deceptive. The penalty for a single violation is a forfeiture of \$1,000.
 - (5) Failure to use the approved course outline. The penalty for a single violation is a forfeiture of \$100.
 - (6) Failure to notify the Department of allowable changes to any course, previously approved, within the 15-day period for such changes. The penalty for a single violation is a forfeiture of \$50.
 - (7) Failure to conduct the approved course for the full time, as specified in the course application. The penalty for a single violation is a forfeiture of \$100.
 - (8) Failure to monitor course attendance. The penalty for a single violation is a forfeiture of \$500.
 - (9) Failure to comply with applicable Americans with Disabilities Act and Equal Employment Opportunity regulations. The penalty for a single violation is a forfeiture of \$100.
 - (10) Failure to provide timely refunds to participants when required. The penalty for a single violation is a forfeiture of \$100.
 - (11) Failure to file or the late filing of any form or other required information. The penalty for a single violation is a forfeiture of \$100.
 - (12) The failure to appropriately monitor an examination. The penalty for a single violation is a forfeiture of \$500.
 - (13) Obtaining the attendance or enrollment of licensees or students by actual or implied coercion. The penalty for a single violation is a forfeiture of \$500.
 - (14) The failure of a provider to timely provide a certificate of completion to an attendee or the failure of a provider to provide an attendee with an accurate certificate of completion. The penalty for a single violation is a forfeiture of \$200.
 - (15) Failure to accurately report the actual number of course hours attended for each individual. The penalty for a single violation is a forfeiture of \$500.

(16) The violation of any provision of 3901-5-01, 3901-5-02, 3905-5-03, 3905-5-04 or 3905-5-07 of the Administrative Code.

(D) Licensee—The following are violations of the pre-licensing education and continuing education statutes and rules:

- (1) The use, submission or filing of any document or record for the purpose of complying with the agent education statutes and rules, or in responding to any inquiry from the Department concerning agent education, when the person or licensee knows or should know that the document or record, or any part of the document or record, is false or deceptive shall be grounds for the superintendent to suspend, revoke, or refuse to issue any licenses as an insurance agent.
- (2) Obtaining, accepting or using any certificate of completion or certificate of attendance from a provider when the licensee has not attended the course or the number of hours identified on the certificate shall be grounds for the superintendent to suspend, revoke, or refuse to issue any licenses as an insurance agent.
- (3) Cheating or using unauthorized materials or receiving unauthorized assistance during an examination shall be grounds for the superintendent to suspend, revoke, or refuse to issue any licenses as an insurance agent.

(E) Application of penalties

- (1) The superintendent may suspend, revoke, non-renew or deny authority to any pre-licensing education or continuing education provider who has committed multiple violations of paragraph (C) of this rule. This penalty may be in addition to the forfeitures levied pursuant to paragraph (C) of this rule.
- (2) The superintendent may, once a violation of paragraph (C) or (D) of this rule requiring a forfeiture has been found, suspend all or part of such forfeiture, upon a showing of mitigating circumstances.

(F) Severability

If any paragraph, term or provision of this rule is adjudged invalid for any reason, the judgment shall not affect, impair or invalidate any other paragraph, term or provision of this rule, but the remaining paragraphs, terms and provisions shall be and continue to be in full force and effect.

Ohio Department of Insurance Continuing Education Program Instructions for Completing the Provider Approval Application

Organizations providing insurance CE for Ohio credit must be reviewed and approved by Prometric. Prometric assigns a provider number that will allow courses to be tracked by provider.

You may apply as a provider when you send your first course for review.

Completing the Approval Form

Provider Name

Print or type the full legal name of the organization providing the education.

Names and Titles of Owners or Officers

List the name and title of each individual who has a significant financial interest in your organization. For partnerships, list all partners. For corporations, name all officers, as well as any shareholders, who have a 10 percent or greater interest.

Address

Provide the complete physical street address, including ZIP code, of the location at which continuing education records will be maintained. In the space provided for a mailing address, you may provide a separate mailing address (such as a post office box).

Authorized Provider Official

Provide the name and title of one individual with whom we should communicate for all business matters. Where several people may be applicable, give the name of the one who knows the contact person for each type of issue that may arise such as course rosters, course materials, schedules, etc. This person must have the authority to execute agreements on behalf of the provider. Enclose with this application a résumé or other document reflecting the qualifications (experience, professional designations, degrees, licenses held, etc.) of this person.

Voice Phone

Give the voice phone number, including the area code, where the Authorized Provider Official may be reached. Also provide a fax number and e-mail address.

Facsimile Signature

You may provide a facsimile signature stamp for the Authorized Provider Official here if you intend to use one for course applications, roster submissions and course completion certificates.

FEIN

Give the company's Federal Employer Identification Number.

URL

Give the company's URL.

Type of Organization

Check the type that best describes your organization. The "Other" category is intended to cover organizations that do not fit into the previous categories. If you use the "Other" category, briefly describe your organization; your application may be assigned to another category.

Former Names and Locations

If your organization has ever operated under a different name, list all names. If a sole proprietorship or partnership, indicate the names of all training companies for which the proprietor or any partner has been a proprietor, partner or held at least a 50 percent ownership interest. If a corporation, for each owner who holds at least 50 percent of the voting stock, please list all training companies for which any of these owners has been proprietor, partner or has held at least 50 percent of the voting stock.

Certification

You must certify that your organization will abide by all Ohio laws and Department of Insurance regulations, policies and guidelines regarding insurance continuing education. The Authorized Provider Official must sign this certification. This application must be notarized.

Submission

Submit the approval form, refund policy (see Page 3, items 3 and 4) and the appropriate fee in the form of a company check, cashier’s check, money order or credit card authorization to:

**Prometric
Attn: Ohio CE
1260 Energy Lane
St. Paul, MN 55108**

***You may pay the fee using American Express, Visa or MasterCard.
If your card is denied, the transaction will not be processed.***

Fees: Providers must elect status at start of year; if a provider changes its status during the year and a different fee is due, the new fee will be in addition to previous payments with no credit for the prior payments:

Flat fee	\$1,000 annually with unlimited course submissions
Individual fee	\$100 per provider and \$40 per course annually
Limited fee	\$25 per provider and \$25 per course annually with a limit of 3 courses of no more than 3 credits each

Use the Fee Worksheet on Page 29 to prepare your payment.

Ohio Department of Insurance Continuing Education Program Instructions for Completing the Course Approval Application

Credit is given only for courses that have been approved. You may not advertise or otherwise promote courses as appropriate for Ohio CE credit until they have been approved. You may not conduct courses for CE credit until you receive written approval from Prometric.

Ohio participates in the NAIC CE Reciprocity Agreement. If you are a provider domiciled in a participating state, you may submit course approval applications using the procedure on Page 20.

Completing the Form

Provider Name

Print or type the full legal name of the organization providing the course.

Provider Number

Enter the provider number assigned to your organization by Prometric. If you do not have a Prometric provider number, leave this space blank.

Course Title

Enter the title (maximum 40 characters).

Course Number

Leave blank; Prometric assigns a number.

Course Type

Mark the formats that will apply for this course. Classroom includes single- and multiple-session classroom courses, seminars, conferences and conventions at which attendance is monitored. Self-study courses are courses for which attendance is not monitored. Self-study courses must be followed by a monitored, closed-book exam. Credit may be given for self-study courses only when the student passes an exam. **Interactive Online courses do not require a monitored exam. See Page 7 for details.**

How Will This Course be Taught?

Check all the methods that will be used to teach this course. A lecture refers to a presentation given by a speaker on a specific insurance topic with some student interaction. A workshop generally has a discussion leader who may make a short presentation and usually will lead a discussion among participants. A panel discussion will typically include two or more subject-matter experts discussing issues surrounding the topic; active participation by the students is usually encouraged. Video/teleconference is generally a presentation of a course using video multimedia transmitted to multiple locations at one time or on videotape for viewing at a later date. Videotaped courses must be presented and/or facilitated by an on-site instructor, whether viewed at interactive teleconference sites or at a later date.

Open to the Industry

Indicate if this course will be open to the industry.

Line of Concentration

Indicate which line of concentration this course will include.

Comprehensive Outline

Attach a comprehensive course outline providing details of what will be taught. Annotate this outline to provide the information necessary to evaluate the course properly. Specifically:

1. Divide the outline into sections of approximately 30 minutes each. List the minutes of instruction devoted to each section. The total number of minutes should equal the length of the course.
2. If it is a multiple-session designation course such as CPCU or LUTC, time annotations are not necessary. Indicate how many sessions will meet and how long the sessions will be. Indicate which sessions are for review. Review sessions will not be approved for CE credit.
3. Include case studies with the outline. Credit will not be assigned for case studies without detail.

Previously Approved by Prometric

Indicate whether Prometric has previously approved this course in another state and if applicable, provide the Prometric-issued course number.

Certification

Certify by signing that all of the information on the form and in the attachments is true and correct, to the best of your knowledge, and that this course will be conducted in accordance with all applicable Department policies and guidelines and Ohio statutes and regulations.

Attachments

1. For classroom courses: annotated course outline. Case studies must be included if used.
2. For self-study courses: copies of all study materials, exam procedures, examinations and affidavits for self-study courses.
3. For Interactive Online courses: copies of all study materials, access to view the course on the Internet and justification that the course meets the basic requirements.

Submission

Send your application form and attachments, along with the appropriate fee in the form of a company check, cashier's check, money order or credit card authorization to:

**Prometric
ATTN: Ohio CE
1260 Energy Lane
St. Paul, MN 55108**

You may pay the fee using American Express, Visa or MasterCard.

If your card is denied, the transaction will not be processed.

Prometric will review and approve or disapprove course approval applications within **30 days of receipt**. If a course application is not approved, you will be informed of the reason(s). If a course is approved, Prometric will send a course approval certificate indicating the assigned credits.

Fees:

Providers must elect status at start of year; if a provider changes its status during the year and a different fee is due, the new fee will be in addition to previous payments with no credit for the prior payments:

Flat fee	\$1,000 annually with unlimited course submissions
Individual fee	\$100 per provider and \$40 per course annually
Limited fee	\$25 per provider and \$25 per course annually with a limit of 3 courses of no more than 3 credits each

Use the Fee Worksheet on Page 29 to prepare your payment.

Ohio Department of Insurance Continuing Education Program Course Approval Application

Provider Name		Provider Number	
Course Title (maximum 40 characters)		Course Number (Leave Blank)	
Course Type: <i>(check one)</i> <input type="checkbox"/> Self-study <input type="checkbox"/> Classroom <input type="checkbox"/> Interactive Online	For classroom only, how will this course be taught? <i>(check all that apply)</i> <input type="checkbox"/> Lecture <input type="checkbox"/> Panel Discussion <input type="checkbox"/> Workshop <input type="checkbox"/> Video/TeleConference <input type="checkbox"/> Other _____	Fee option: <input type="checkbox"/> Flat <input type="checkbox"/> Individual <input type="checkbox"/> Limited	Number of credit hours requested _____
Is this course open to the industry? <input type="checkbox"/> Yes <input type="checkbox"/> No	Line of concentration: <input type="checkbox"/> General <input type="checkbox"/> Title <input type="checkbox"/> Bail Bond		
<p>For all courses: Attach refund policy and tuition.</p> <p>For Classroom courses: Attach a comprehensive course outline and bibliography. Annotate the outline indicating, for each section, the number of minutes of instruction that will be offered and the method of presentation for each component.</p> <p>For Self-Study courses: Include study materials, exam procedures and sample exam.</p> <p>For Interactive Online courses: Include study materials, access to view course online and justification that course meets basic requirements.</p>			
Has this course been previously approved by Prometric in another state? <input type="checkbox"/> Yes <input type="checkbox"/> No		If so, provide Prometric-issued course number.	
I, the undersigned, do hereby certify that all information provided herein is true and correct.			
_____ Printed/Typed Name of Authorized Provider Official	_____ Signature	_____ Date	

PLEASE PRINT OR TYPE. PHOTOCOPY AS NEEDED.

OHC-01 (rev 01/06)

ACCEPTABLE COURSE OUTLINE

DIRECTORS AND OFFICERS LIABILITY

- | | | |
|------------|---------------|---|
| 25 minutes | 8:30 - 8:55 | I. Recent history of D&O liability exposure
A. Trends in D&O claim frequency and severity
B. Major problem areas
1. Federal securities laws
2. Mergers/acquisitions
3. Pollution claims
4. Financial institutions claims
5. Third-party claims
C. Recent large settlements and judgments |
| 25 minutes | 8:55 - 9:20 | II. Legal concepts underlying the D&O exposure
A. Basic legal duties of Directors and Officers
1. Duty of obedience
2. Duty of loyalty
3. Duty of care
B. To whom duties are owed
C. Common defenses
D. Recent legislation limiting director liability |
| | 9:20 – 9:30 | BREAK |
| 50 minutes | 9:30 - 10:20 | III. Common exclusions
A. Public policy exclusions
1. Dishonesty
2. Gaining an illegal profit or advantage
3. Section 16(b) of the Securities Exchange Act
4. Return of excessive remuneration
B. Intended to be covered elsewhere
1. Libel and slander
2. Nuclear energy
3. Employment practice |
| | 10:20 – 10:30 | BREAK |
| 50 minutes | 10:30 - 11:20 | IV. Case study
Review of ABC Corporation’s stockholder lawsuit alleging mismanagement by the corporation’s board of directors and senior management. Study includes review of facts, company’s defense and participation in defense by the insurer. |

Reasons for acceptability:

1. Sufficient detail on subject matter covered.
2. Sufficient detail on amount of time spent on each topic.
3. Insurance policy content is a topic that qualifies for credit.
4. Breaks are noted on the outline. Ten minutes per hour of instruction are recommended.
5. Case study is described. It is useful to include the case study materials with the outline.

SAMPLE UNACCEPTABLE COURSE OUTLINE

ADVANCED WORKERS COMPENSATION SEMINAR

- | | |
|-----------------------|---|
| 8:00 a.m. – noon | I. Introduction |
| | II. Policy coverages |
| | A. Benefits to injured workers |
| | B. Employer liability |
| | III. Writing workers' compensation coverages with Middle Atlantic Life and Casualty |
| | A. Sales support to agents |
| | B. Price and service comparisons to competitors |
| | IV. Use of technology by agents to service clients |
| | A. Wonder Wizard Claim Reporting Software |
| | B. Visit the Middle Atlantic Life and Casualty interactive Web site |
| Working luncheon | |
| Noon – 1:00 p.m. | V. Reserving |
| 1:00 p.m. – 4:00 p.m. | VI. Loss control activities |
| | VII. Case studies |
| | VIII. Panel discussion with experts |

Deficiencies in this outline:

1. Insufficient detail on subject matter covered.
2. Insufficient detail on amount of time spent on each topic.
3. Sales and marketing topics are not eligible for credit.
4. Company-specific procedural or marketing content is not eligible for credit.
5. Training for office technology or use of the Internet is not eligible for credit.
6. Course material may not be presented concurrently with meals.
7. Where case studies are used, a description of the case study must be included with the course outline.
8. Where panel discussions are used, a description must be provided along with a description of the topic(s) to be addressed and backgrounds of the panel members.
9. Breaks are not noted on the outline.

Instructions for Providers Eligible for NAIC CE Reciprocity

As of December 2007, all states or jurisdictions are participating in the agreement **EXCEPT:**

American Samoa	Massachusetts
Florida	Puerto Rico
Guam	Virgin Islands

To obtain Ohio approval, based on this reciprocity, you must complete these steps:

1. You must be approved as a provider in your state of domicile.
2. You must have received a course approval document from your state of domicile. This may either be a letter of approval or the stamped approved application form that was filed in the resident state.
3. You must be approved as an Ohio provider. This is a separate application that must be completed before you can apply for course approval. The approval is subject to an annual renewal each calendar year.
4. You must complete the NAIC Uniform Continuing Education Reciprocity Course Filing Form for each course.
5. You must submit a photocopy of the course approval document from your home state.
6. You must pay the normal fee according to your provider fee option.
7. You must attach an outline of the approved course.
8. Send applications, outlines and fees to:

**Prometric
Attn: Ohio CE
1260 Energy Lane
St. Paul, MN 55108**

No other attachments are required.

Ohio is not required to accept any topic, provider or instructor that is not eligible for approval under its laws and regulations.

See Page 25 for instructions on how to report course credits for agents and Page 28 for reporting classroom course offering schedules.

Fees:

Providers must elect status at start of year; if a provider changes its status during the year and a different fee is due, the new fee will be in addition to previous payments with no credit for the prior payments:

Flat fee	\$1,000 annually with unlimited course submissions
Individual fee	\$100 per provider and \$40 per course annually
Limited fee	\$25 per provider and \$25 per course annually with a limit of 3 courses of no more than 3 credits each

**You may pay the fee using American Express, Visa or MasterCard.
If your card is denied, the transaction will not be processed.
Use the Fee Worksheet on Page 29 to prepare your payment.**

NAIC UNIFORM CONTINUING EDUCATION RECIPROCALITY COURSE FILING FORM
 Please clearly print or type information on this form. Thank you for helping us promptly process your application.
Provider Information

Provider Name				Federal Tax ID # (FEIN/SSN)			
Contact Person		E-mail Address of Contact Person			Is Provider an Insurer? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Phone Number () - ext.		Fax Number () -		Home State	Home State Provider #	Reciprocal State	Reciprocal State Provider #
Mailing Address				City	State	Zip Code	
I agree to file this course in my Home State to receive Reciprocity in other states. The only time a Provider is allowed to file in a state other than its Home State is if the home state has restriction by law on the number of course credit hours.							

Course Information

Course Title			Is this course open to Public? <input type="checkbox"/> Yes <input type="checkbox"/> No				
Method of Instruction				*National Course*			
Self-study <input type="checkbox"/> Correspondence <input type="checkbox"/> On-line Training (self study) <input type="checkbox"/> Teleconference <input type="checkbox"/> Video/Audio/CD/DVD <input type="checkbox"/> Other _____		Classroom <input type="checkbox"/> Seminar/Workshop <input type="checkbox"/> On-line Training (facilitated) <input type="checkbox"/> Other _____		National Insurance Designation? <input type="checkbox"/> Yes <input type="checkbox"/> No Designation Type:			
Examination Required? <input type="checkbox"/> Yes <input type="checkbox"/> No				Course offered by Higher Education Institution? <input type="checkbox"/> Yes <input type="checkbox"/> No			

Credit Hours Requested and Course/Hours Decision

Course Concentration	Hrs. Requested by Provider		Hrs. Approve by Home State		Hrs. Approved by Reciprocal State	
	Sales/Mktg	Insurance	Sales/Mktg	Insurance	Sales/Mktg	Insurance
A. Insurance Topics:						
Accident/Health						
Casualty						
Ethics						
General Insurance Principles						
Insurance-related Laws						
Life						
Long Term Care						
Personal Lines						
Property						
Variable Life and Annuity						
Viatical Settlement						
Other						
Total Hours						
B. Adjuster Topics (Total Hours)						
Approval/Disapproval date						
Course number assigned (if course is approved)						
Course approval expiration date (if course is approved)						
Home State disapproval reason (if disapproved):						
Signature of Home State Representative:						
Reciprocal State disapproval reason (if disapproved):						
Signature of Reciprocal State Representative:						

Ohio Department of Insurance Continuing Education Program Instructions for Completing the Publication/Course Author Credit Application

Ohio CE rules provide for the following:

- A person may receive up to 10 hours of CE credit per reporting period for the publication of articles or books authored by such person. Articles and books must deal with matters directly related to the business of insurance. An article must be published in a generally known and recognized state or national publication. The extent to which such credit may be given shall be at the discretion of the superintendent. A request for such credit must be made in writing and must be accompanied by proof of authorship and publication.
- CE credit may be allowed for the authors of written materials used in approved CE courses. The author will be allowed the number of CE credit hours for which the course was approved. If there are multiple authors of the written course materials, no author will receive more than his or her pro rata share as determined by the provider. The total number of hours received by all authors for a course cannot exceed the total number of hours for which the course is approved.
- Instructors for approved CE courses may receive CE credit for instructing courses. Credit may be given in an amount equal to the number of hours actually spent instructing a course. Credit will be given only once per course per compliance period. To receive credit for teaching an approved classroom course, the provider adds the instructor's name and NPN to the course roster.
- A person who authors materials for an approved course and teaches the same course in a compliance period may receive credit for authoring the written materials or instructing the course, but not for both activities in any one compliance period.

Completing the Application

Name and National Producer Number (NPN)

Print or type the full legal name and the NPN of the author.

Address

Provide the author's complete physical street address, including ZIP code.

Course Name

Provide the name of the course.

Course Number

Indicate the course number.

Chapter or Article Name

Provide the name of the chapter or article.

Publisher and Publication Date

Indicate the publisher and publication date.

Book or Magazine Name

Give the name of the book or magazine.

Certification

You must certify that the information on this application is true and accurate.

Submission

Submit the application and magazine or book to Prometric.

Ohio Department of Insurance Continuing Education Program

Publication/Course Author Credit Application

PLEASE PRINT OR TYPE. PHOTOCOPY AS NEEDED.

Name		NPN
Street Address		
City	State	ZIP Code
Course Name		Course Number
Chapter or Article Name		
Publisher		
Publication Date		
How to Submit an Application		
Complete all appropriate information on this form. Include the following documents with this application		
1. If a magazine article, an original copy of the magazine		
2. If a book or book chapter, an original copy of the book (it will be returned)		
Sign below and mail to: Prometric ATTN: Ohio CE 1260 Energy Lane St. Paul, MN 55108		
Signature _____		Date _____
The information I have provided is true and correct and may be relied upon for evaluation of CE credit.		
If approved, you will receive a request for payment, indicating the number of credits awarded and the amount of payment due. Credit will not be recorded in your CE files until payment is received.		

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SAMPLE

**OHIO DEPARTMENT OF INSURANCE CONTINUING EDUCATION
COURSE COMPLETION CERTIFICATE**

Name of Student: _____
National Producer Number (NPN): _____

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

Course Name: _____
Course Number: _____
Number of Credits: _____
Date of Course Completion: _____

Provider Name: _____
Provider Number: _____
Address: _____
Phone Number (including area code): _____

Signature of Authorized Provider Official: _____
Title: _____
Date: _____

Providers may create their own forms for course completion certificates, provided all of the same information indicated above is clearly reflected on the certificate.

For self-study courses, use the date of the exam as the course completion date.

Ohio Department of Insurance Continuing Education Instructions for Roster Reporting

Providers are strongly encouraged to use the Internet reporting procedure through **sircon.com**.

- **The roster form may not be used as the sign-in form.**
- A typed or computer-generated list with the same information is acceptable.
- For rosters that exceed one page, only the course number, course completion date and provider number are needed in the provider information section after the first page.
- **Rosters must be submitted within 15 calendar days of the course's completion.**

Completing the Form

Provider Number

Enter the provider number assigned by Prometric.

Provider Name

Enter the name of your organization. This field and the course name are secondary identifiers. The primary identification fields are the provider number and course number. Be especially careful to complete them accurately.

Course Number

Enter the Prometric-assigned course number.

Course Title

Enter the course title.

Course Completed

Enter the date the course was completed. For self-study courses, enter the date the exam was **completed**.

National Producer Number (NPN)

Enter the individual's NPN. Students failing to provide that number will not be granted CE credit.

Student Name

Enter the last name, first name and middle initial, as space permits. As with provider and course names, the name is a secondary identifier in case the individual's NPN is not accurate.

Instructors

To grant credits to an instructor, add the name and NPN to the roster. Also indicate that the instructor is to receive double credits.

Fees

The reporting fee is \$1.00 per credit for each student name on the roster. Enclose a check or credit card authorization payable to Prometric. Multiple checks from agents will not be accepted. A single payment may be used to cover multiple roster submissions.

***You may pay the fee using American Express, Visa or MasterCard.
If your card is denied, the transaction will not be processed.
Use the Fee Worksheet on Page 29 to prepare your payment.***

Submission

Send the roster form(s), transmittal form and the appropriate total fee to:

**Prometric
ATTN: Ohio Roster Submissions
1260 Energy Lane
St. Paul, MN 55108**

A confirmation letter will be sent to providers within 2-3 weeks of receipt indicating that the roster has been processed. **If an error is made by the provider on the roster submission, the provider is responsible for resubmitting the corrected roster with an additional reporting fee.**

Ohio Insurance Continuing Education Course Roster

Rosters must be submitted within 15 calendar days of the course completion date.

Provider Number

Provider Name

Course Number

Course Title

Completion Date (mm/dd/yyyy)

Students

National Producer Number	Last Name	First Name	Middle Initial
<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
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<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>
<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/>

Ohio Department of Insurance Continuing Education Program Transmittal for Roster Reporting

Complete this form and include with paper rosters.

Roster fee is \$1.00 per credit per student. For Example:

3 students complete a 4-credit course. Fees due would be $3 \times 4 \times \$1.00 = \12.00 .

1 student completes a 30-credit course. Fee due would be $1 \times 30 \times \$1.00 = \30.00 .

13 students complete a 3.5 credit course. Fee due would be $13 \times 3.5 \times \$1.00 = \45.50 .

The enclosed roster contains the following:

Total number of student records: _____

Total Fee \$ _____

Enclose one credit card authorization or check payable to Prometric for the total fee. Do not send checks from individual students.

***You may also pay using American Express, Visa or MasterCard.
If your card is denied, the transaction will not be processed.***

Card number: _____

Name on card: _____

Expiration date: _____

Send to: **Prometric**
ATTN: Ohio Roster Submissions
1260 Energy Lane
St. Paul, MN 55108-5252

Submitted by: _____

Provider Number: _____

Provider Name: _____

Prepared by: _____

Phone Number: _____

E-mail Address: _____

Ohio Department of Insurance Continuing Education Program Course Offering Schedule

Provider Name _____ Provider Number _____

Provider's Contact Person _____ Voice Phone Number _____

You may enter and edit course offering schedule information at: www.sircon.com without using this form.

PLEASE PRINT OR TYPE

Course Number	Course Title	Location of Course <i>(Complete address with room name and number. Include building name and/or name of business, city, state and ZIP code)</i>	Schedule <i>(Dates held and beginning /ending times for approved segments)</i>	Contact Person and Phone Number at Location

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Use this form to notify Prometric of all classroom course offerings.

Include this form with new course submissions, leaving the course number blank.

Schedules for subsequent course offerings or schedule changes must be received **at least 15 days in advance**. Notify Prometric **immediately** if a reported course offering or self-study exam is changed or canceled.

MAIL TO: Prometric, ATTN: Ohio CE Schedules, 1260 Energy Lane, St. Paul, Minnesota, 55108 or

FAX TO: 800.735.7977

Ohio Department of Insurance Continuing Education Program Fee Worksheet

This form is for convenience in preparing submissions. Using it is optional.

Provider Approval \$ _____

Flat Fee
(\$1,000 annually with unlimited course submissions)

Individual
(\$100 fee per provider)

Limited
(\$25 fee per provider)

Course Fees	<u>Number</u>	<u>Subtotal</u>
--------------------	---------------	-----------------

*No course fees are required if you are a flat fee provider

Individual Course Approval	_____ @ \$40	\$ _____
----------------------------	--------------	----------

Limited Course Approval (limit of 3 courses of no more than 3 credits each)	_____ @ \$25	\$ _____
--	--------------	----------

Roster Reporting

(Requires Roster Transmittal Form on Page 27 and Roster)

\$1.00 per credit for each name on roster \$ _____

TOTAL \$ _____

One check may be written to cover all fee types.

Payment may be made by check or money order payable to Prometric.

You may pay using American Express, Visa or MasterCard.

Card number: _____

Name on card: _____

Expiration date: _____

If your card is denied, the transaction will not be processed.