Dear Insurance Education Provider,

Welcome to the exciting world of insurance education! This packet contains tools and resources that are designed to assist you as an insurance education provider in Florida. We know they will be beneficial to you whether you are just beginning your career as an education provider or have been an education provider for many years.

Enclosed in this packet, you will find helpful tips on the following:

Getting Started – Accessing MyProfile Account
- Main Page – Provider Inboxes
- Main Page – Navigation Buttons
- What to do if you log in and do not see the Navigation Buttons

Getting Started – Submitting a Course
- Course Reminders
- How to Submit a Course
- Approved Courses

Getting Started – Submitting a Course Offering
- Course Offering Reminders
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Getting Started – Submitting a Roster
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Maintaining MyProfile – Provider Profile
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Please take the time to review the enclosed documents. We wish you well on the ever continuing pursuit of knowledge.

Sincerely,

Education Unit
Bureau of Licensing: Education
Division of Agent & Agency Services
The School Official will receive an email regarding the steps needed to create a MyProfile account.

Once the School Official has completed the setup process, they will have access to the Provider account.

1. **Gaining Access**

   Go to the MyProfile login screen and enter your School Official username and password to **gain access**: https://dice.fldfs.com/public/pb_index.aspx

2. **Provider Account**

   Select the **Provider Account** and click “Next” *(Note: There may be only one provider option; however, “Apply as a new Provider” will always be an alternate option. Some School Officials act on behalf of multiple providers.)*
3. Main Page – Provider Inboxes

On the Main Page, you will see the Provider inbox with three provider inboxes: Agency, Roster/Expired and DFS Requests. The default view is set to the Agency inbox to view notifications from the Department regarding the Provider account. The DFS Request inbox will show any requests for information on pending applications that need to be addressed and responded to in order to avoid closure of the submitted application.

4. Main Page - Navigation Buttons

The Navigation Buttons allow you to do many functions. We will discuss these functions in more detail throughout this packet.

If you log in and do not see the Navigation Buttons, follow the steps below:

1) Confirm you are using Internet Explorer as your web browser. Please note that Internet Explorer is the only browser that fully supports the online system for course submissions, etc.

   *Special Note:* Windows 10 defaults to the Microsoft Edge browser which requires downloading and installing “apps” in order to run specific websites. The Department does not recommend using this browser for our website. Please utilize Internet Explorer 8 or later while viewing and using Department websites for best service.

2) Login to MyProfile and navigate to the Main Page (you will see your inboxes)

3) On the top menu bar select Tools (Alt +x)
4) Select “Compatibility View Settings”. The address for the current page will appear in the top box.

5) Click the “Add” button next to the top box to add the page to Compatibility View. The website will move to the bottom box.

6) Click the “Close” button.
7) Refresh the page. Note: You may need to log in again.

You should now see the Navigation Buttons and have the ability to move throughout the Provider account.
Now that you are able to access your MyProfile account, you are ready to submit a course to the Department.

1. Course Reminders

**Before submitting a course, below are a few reminders:**

1) Courses should be submitted for continuing education approval at least 90 days prior to the course being offered.
   - The course review can take up to 60 days
   - The course offering must be submitted 5 days prior to the course being held

2) **Advertising** a course as “Approval Pending” or any other misleading language is prohibited in Florida *(Department Rule 69B-228.150, F.A.C)*

3) The following are **not eligible course topics** for continuing education in Florida:
   - Organizational procedures and internal policies of an insurer or any other employer
   - Motivation
   - Salesmanship or sales promotion including marketing and courses which are primarily intended to impart knowledge of specific products or of specific companies
   - Courses in mechanical office or business skills (i.e. typing, speed racing, etc.)
   - The use of calculators or other machines or equipment
   - The use of computer software or equipment, except in computer-based needs analysis, computer solutions to risk management as related to insurance customers, rating, and underwriting, or other line of authority
   - Accounting or tax preparation in connection with the internal business of the licensee
   - Courses in communication, time management or stress management

   *You can review course requirements in Department Rule 69B-228.080, F.A.C.*
2. How to Submit a Course

Go to the Navigation Buttons and click on **Apply**. You will see the drop-down menu below. Click on “**Course**”

1) **Demographics Screen**: This screen is an overview of the course application. Items marked in **red** are required.
Below is a description of each item listed on the Demographics screen:

- **Course Name**: The title of your course
- **Description**: A description for the Department and licensees of what your course will entail
- **Course Type**: Type of course, Continuing Education or Pre-Licensing
- **Study Method**:
  - Classroom – Classroom courses must be taught by a FL approved instructor. Classroom courses expire after they are not offered for 2 years.
  - Self-study Correspondence – Self-study courses taught by book or other correspondence method. No instructor is required however a final exam is needed. Self-study Correspondence courses expire once they are not offered for 2 years.
  - Self-study Online – Self-study courses taught online. No instructor is required however a final exam is needed. Self-study Online courses expire once they are not offered for 2 years.
  - Seminar-Full – Courses that will be taught for a year or less, such as the 5-hour course. Guest speakers are allowed; however an approved instructor in the course authority being taught must be present. Seminar courses expire one year from the approval date.
  - Seminar-Partial – Seminar courses that allow the licensee the option to choose between several offered lectures to attend during a specific timeframe. Seminar courses expire one year from the approval date.

**IMPORTANT NOTE**: Regardless of the study method of the course, all 5 Hour Law & Ethics Update courses expire one year from the approval date.

- **Course Level**: You should choose Basic, Intermediate or Advanced based on the difficulty level of the course content, using rule 69B-228.080(9) as a guideline. This field is grayed out for pre-licensing courses as all pre-licensing courses are basic level.
- **Subject Area**: The subject area should match the course authority
- **Comments**: Any comments you would like the Department to know regarding the course

*Click “Next” to continue.*
2) **Course Authority Selection:** This screen will allow you to choose the course authority and the requested hours of CE credit

Click “Next” to continue.

3) **Attachments:** This screen will allow you to attach course documents.

Documents should be submitted as a PDF or Word doc (97-2003 version) no larger than 5MB. You may submit as many documents as needed!
What documents should be submitted to the Department?

- A complete checklist of “What to Submit in a Pre-Licensing Course Application” and “What to Submit in a Continuing Education Application” can be found at:
  
  http://www.myfloridacfo.com/Division/Agents/Licensure/Education/default.htm

- Click on the Providers Link under Education Information

4) **Payment:** This screen provides the Payment Summary for the course. The application fee for Continuing Education courses is $100. There is a processing fee of $2.45.

  - **Note:** There is no charge for Pre-licensing courses, so you will not see the Payment page.

5) **Confirmation:** The final page that will display is a confirmation page, showing the course was submitted to the Department for approval.
3. Course Review

Once the course is submitted, it will be reviewed by the Department. If additional information is needed to approve the course, you will receive a DFS Request.

To view the DFS Request, go to the DFS Requests tab on the Main Page.

1) Click on the Course Name to review the DFS Request
2) Review “Information Requested” to determine the information needed to complete the course review.

3) Provider Response: Type your response to the DFS Request
4) Attach Documents: Attach any requested documents
5) Click “Submit”. The Provider Response will be reviewed within 3 business days.
   • Note: Once you respond to a DFS Request, the request is removed from your inbox. You will not be able to respond again unless you are resent the request.

4. Approved Courses
Once the course has been approved, you will receive an email in the **Agency** tab of the Home Page showing the course has been approved.

1) **Viewing Approved Courses:**

   - To view the approved course, click on the blue “Notification” link in the **Agency** tab of the Home Page.

   ![Notification Link](image)

   - To view a listing of all of your approved courses, go to the Navigation Buttons and click on **Maintenance**. You will see the drop-down menu below. Click on “**Course List**”.

   ![Course List](image)
• Click “Search” to view all of your courses.
• To narrow your search, you can select the Course Authority, Course Number, Course or Name.

The course list defaults to “Active” courses. Click on “All Other Statuses” to see closed and pending courses.

Do you want to clean-up your course list?
If you are no longer offering a course listed in your “Active” course list, email us a request to close your course making sure to include the course ID number. Email education@myfloridacfo.com and we will close the course for you!
Once your course has been approved, you are ready to submit a course offering. The course offering notifies the Department you will be offering the CE course.

1. Course Offering Reminders

**Before submitting a course offering, below are a few reminders:**

1) The *course offering* must be submitted for approval at least 5 days prior to the course being offered

- Course offerings can be submitted up to 1 year in advance.

   *You can review course offering requirements in Department Rule 69B-228.090, F.A.C.*

2) Instructors:

- **Classroom** courses must be taught by an approved instructor
- **Seminar** courses allow guest lecturers, however they must have an approved instructor present in the course authority being taught
  
  ✓ The approved instructor must be listed on the course offering
  ✓ The guest lecturer(s) bios/resumes must be on file with the approved course
  ✓ The instructor listed on the course offering must be the same instructor that teaches the course. More than one instructor can be listed on a course offering.

- **Self-study** courses do not require an instructor to be listed, however, if there is an instructor associated with the course they should be listed on the offering.

3) If there are any changes, a revised course offering must be submitted to the Department.

  ✓ If an instructor changes
  ✓ If the date changes
  ✓ If the time changes
  ✓ If the location changes

- **Changes** to course offerings are required to be submitted to the Department and approved prior to the date when the change will be effective per Rule 69B-228.090(2), F.A.C.
2. Preparing to Submit a Course Offering

Before submitting a course offering, you will need to complete two very important steps:

1) Instructor ID: Find the instructor ID number for Classroom and/or Seminar Courses

- Instructors attached to your provider account: Go to the Navigation Buttons and click on Maintenance. You will see the drop-down menu below. Click on "Instructor List"

- Click “Search”. You will see a listing of all approved instructors for your provider account.
- The instructor ID number is listed on the left hand side.
- To view the course authorities the instructor is approved to teach, click “Instructor Name”.

Once you find the ID #, write it down!
- **Instructors not attached to your provider account**: Click on the Providers Link under Education Information at: [http://www.myfloridacfo.com/Division/Agents/Licensure/Education/default.htm](http://www.myfloridacfo.com/Division/Agents/Licensure/Education/default.htm)

Click on the link “A List of All Instructor IDs as of (current edition date)”

2) **Course Location**: Add the course location to DICE

- Go to the Navigation Buttons and click on **Maintenance**. You will see the drop-down menu below. Click on “**Location List**”
• Click “New”. You will see the Location Detail Screen below. Items marked in red are required. Once all items are completed, click “Save”.

• The location is now saved in the provider Location List and is ready for use in the course offering.

3. How to Submit a Course Offering

Go to the Navigation Buttons and click on Apply. You will see the drop-down menu below. Click on “Course Offering”
1) **Offering Application:**

This screen is an overview of the course offering application. Items marked in *red* are required.

- **Course:** The title of your course (this is a drop-down menu of all approved courses)
- **Program Type:** *In-house* courses are only offered to a select group of individuals (i.e. employees). *Public* courses are offered to any licensee.
- **Instructor ID:** Add the instructor ID number for Classroom and Seminar courses
- **Date:** The date the course will occur
- **Day of Week:** Weekday(s) the course will occur
- **Time:** The time the course will occur
- **Lunch Break:** The time a lunch break occurred (non-CE time)
- **Location:** Location of course (this is a drop-down menu)
- **Comments:** Any comments the Department should know regarding the course, such as timing or breaks that cannot be included above, venue notes, etc.

**What if I make a mistake on a course offering?**

- Complete the Section: “Does this offering replace another offering (e.g., correction)?
  □ Yes”
  ✓ State “Yes” if you are replacing a current course offering due to a new instructor, new location, change in time or date
  ✓ Complete the section “This offering replaces Course Offering ID” and click “Search”
  ✓ This will replace the old course offering with the corrected/revised information.

**IMPORTANT NOTE:** If your offering was approved with the incorrect course, cancel the incorrect offering then submit a new course offering and select the appropriate course.
4. Approved Course Offerings

Course offerings submitted at least 5 days in advance are automatically approved. You will receive an email in the Agency tab of the Home Page showing the course offering has been approved.

1) Reviewing Approved Course Offerings:

- To view the approved course offering, click on the blue “Notification” link in the Agency tab.

- To view a listing of all of your approved course offerings, go to the Navigation Buttons and click on Maintenance. You will see the drop-down menu below. Click on “Offering List”
● You can search by “Course” or “Course Offering ID”.

✓ To search by Course, select the course you would like to view the course offerings for and enter “Search”

✓ The default view is “Active” course offerings. “All Other Statuses” shows closed, cancelled and expired course offerings.

✓ Course offerings automatically close after the course date has passed. You are able to upload a roster on closed course offerings.

WARNING: While viewing the course offering, there is a “Save” and a “Cancel” button. Do not click any buttons on this page if you are just viewing your offering. If you accidentally click “Cancel”, the course offering will be canceled!
Now that the course offering is approved and the course has been held, you are ready to submit the attendance roster to the Department. The roster provides CE credit to the course attendees.

1. Roster Reminders

**Before submitting a roster, below are a few reminders.**

1) Rosters must be posted within 21 days of the course completion to allot continuing education credit to licensees who attended the course

- Self-study course rosters may be sent once a month on the last day of the month, or when the last results of examinations for that month are completed

2) A completed Certificate of Completion must be issued to each person completing a continuing education course

- The Certificate of Completion must be issued within 30 days of the date the student completes the course.
- The Certificate of Completion must include:
  1. Name of the student
  2. License number of the student
  3. The provider name
  4. The provider ID number
  5. The course ID number
  6. The course offering ID number
  7. The name of the course
  8. The name of the instructor (required for classroom and seminar)
  9. The instructor ID number (required for classroom and seminar)
  10. The completion date of the course
  11. The date the certificate was awarded
  12. A statement certifying that the person named on the certificate has successfully completed an insurance course taught in compliance with the rules of the Department.
  13. The signature of the School Official
  14. Self-study courses must also include the final examination score

3) Approved course providers must maintain accurate attendance records for 5 years after each course completion containing:

- The name, date and location of the offering
- Documentation that an ID was checked
- Licensee name and license ID number
- Proof of at least 2 attendance checks for classroom and seminar courses over 4 hours
- A statement signed by the instructor (and/or school official) that the attendance records are correct
You can review roster requirements in Department Rule 69B-228.100, F.A.C. How to Submit a Roster
Go to the Navigation Buttons and click on Roster. You will see the drop-down menu below.
Click on “Submit Attendance Roster”

1) To enter the roster manually, select “Enter Roster Manually”

- Enter the course offering ID number and Click “Search”
- A blank screen will appear. You may enter up to 10 attendees per screen.

- If you have more than 10 attendees at the end of each screen select “Add attendees” and a new screen will be brought up.
2) To enter the Roster by an Excel Spreadsheet, click on the Help button at the top of this page (the Help button is located in the Navigation Buttons). Click on “Help for this Page”

- Select “Excel Format”

- Follow the directions as given for inputting Excel files; then return to the previous screen.

- Once your Excel file is ready to submit, select “Submit Attendance Roster” and click the “Browse” button. Follow the directions to upload your file to our server.
Now that you know how to submit a course, it’s time to learn how to submit an instructor application.

1. Instructor Reminders

   **Before submitting an instructor application, below are a few reminders:**

   1) **Classroom** courses must be taught by an approved instructor. **Seminar** courses allow guest lecturers, however they must have an approved instructor present in the course authority being taught.

   2) For all continuing education courses, instructors must meet one (1) of the following qualifications:

   - Have at least 10 years working experience in the subject matter in the last 20 years.
   - Have at least 200 hours instructing in the subject matter in the last 4 years.
   - Possess a chartered property and casualty underwriter (CPCU) or chartered life underwriter (CLU) designation.
   - Have a Risk Management Insurance degree.
   - Membership in the Florida Bar Association with minimum of 2 years of law practice or counsel in the subject area being taught.

   OR instructors must meet two (2) of the following qualifications:

   - Have at least 5 years working experience in the subject matter in the last 10 years.
   - Have at least 40 hours of instructional experience in the last 4 years.
   - Possess a Bachelors degree or higher in the subject matter.
   - Possess a professional designation recognized by the insurance industry in the subject matter.

   3) For all pre-licensing courses, instructors must meet one (1) of the following qualifications:

   - At least ten (10) years working experience in the subject matter in the last twenty (20) years
   - At least two hundred (200) hours instructing in the subject matter in the last four (4) years
   - Chartered property and casualty underwriter (CPCU) or chartered life underwriter (CLU) designation
   - Risk Management Insurance degree
   - Florida Bar membership with two (2) years experience litigating the subject matter

   OR the instructor must meet two (2) of the following qualifications:

   - At least five (5) years working experience in the subject matter in the last ten (10) years
   - At least forty (40) hours instructional experience in the last four (4) years
   - Bachelors degree or higher in the subject matter
   - Professional designation recognized by the insurance industry in the subject matter
4) **Bail bond** supervising instructors/school officials (continuing education and pre-licensing) must meet the qualifications as set forth in Section 648.386(4), F.S., subject to the limitations imposed in Rule 69B-227.310, F.A.C.

   *You can review instructor requirements in Department Rule 69B-227.160, F.A.C., Department Rule 69B-228.060, F.A.C., and Section 648.386(4), F.S.*

2. **How to Submit an Instructor Application**

   Go to the Navigation Buttons and click on **Apply**. You will see the drop-down menu below. Click on “**Instructor**”

   1) **Identification Screen**: This screen is the applicant identification screen. This screen is the beginning of the instructor application.
2) **Course Authority Selection:** This screen allows you to select the course authority you would like the instructor to teach.

- A new application must be completed for each course authority.

3) **Demographics Screen:** This screen is the instructor application, including name and contact information. Items marked in red are required.

4) **Background Questions:** Every applicant must answer the background questions. Page Help, or Instructions, are listed on the left hand side of the screen.
5) **Qualification Information**: This screen allows you to input the instructor’s qualifications. Click on the instructor’s qualifications and click “Submit”.

6) **Confirmation**: The final page that will display is the confirmation page, showing the application was submitted to the Department for approval.

3. **Approved Instructors**
   
   1) **Viewing Approved Instructors**

   - To view the approved instructor, click on the blue “Notification” link in the **Agency** tab of the Home Page.
• To view a listing of all instructors attached to your provider account, go to the Navigation Buttons and click on Maintenance. You will see the drop-down menu below. Click on “Instructor List”

• Click “Search”
• To narrow your search, you can select the Instructor ID, First Name or Last Name

• Click the Instructor Name link to see the course authorities the instructor is approved to teach.

To find instructors not attached to your provider account, go to the “Providers” link at http://www.myfloridacfo.com/Division/Agents/Licensure/Education/default.htm

Click on the link “A list of All Instructor IDs as of (current edition date)”
1. Who Should be listed as a School Official or Contact in the Provider Account

Anyone submitting courses, course offerings, rosters or in direct contact with the Department should be listed in the provider MyProfile account as a school official or contact

- Anyone using the provider account should have their unique login and password to access MyProfile

What is the difference between a School Official and a Contact?

1) A School Official is responsible for the actions of the provider
   - To become a school official, an application has to be completed
   A Supervising Instructor is the School Official for Bail Bond providers with additional responsibilities as listed in the 2nd bullet below
   - To become a supervising instructor, an application has to be completed and specific qualifications must be met per 648.386, F.S. as follows:
     1. During the past 15 years, the person must have had at least 10 years’ experience as a manager or officer of a managing general agent in this state as prescribed in s. 648.388;
     2. During the past 15 years, the person must have had at least 10 years’ experience as a manager or officer of an insurance company authorized to and actively engaged in underwriting bail in this state, provided there is a showing that the manager’s or officer’s experience is directly related to the bail bond industry; or
     3. The person has been a licensed bail bond agent in this state for at least 10 years.
   - A Supervising Instructor must attend all classes and is responsible for
     1. All course instructors
     2. All guest lecturers
     3. The course outlines and curriculum
     4. Certification of each attending limited surety agent or professional bail bond agent
     5. Assuring that the course is approved

2) A Contact works under a school official and is not responsible for the actions of the provider
   - Contacts do not need to complete an application
   - Contacts can have different access, or permission, in the provider MyProfile account depending on each provider’s preference
   - Contacts can be added or removed at any time
2. How to Add a School Official/Supervising Instructor

School officials require a **submitted school official/supervising instructor application**. The application can be added directly through your provider MyProfile account.

Go to the Navigation Buttons and click on **Apply**. You will see the drop-down menu below. Click on “**School Official**”

1) **Identification Screen**: This screen is the applicant identification screen. This screen is the beginning of the school official application

- The applicant is required by state and federal law to disclose their social security number on this application
2) **Demographics Screen:** This screen is the instructor application, including name and contact information. Items marked in **red** are required.

3) **Background Questions:** Every applicant must answer the background questions. Page Help, or Instructions, are listed on the left hand side of the screen.

4) **Confirmation:** The final page that will display is a confirmation page, showing the application was submitted to the Department for review.

   - Once the application is approved, the school official will receive an email with instructions on how to login and access the provider MyProfile account.

3. How to Remove a School Official

   If a school official is no longer working for the provider and should be removed, email the Department at education@myfloridacfo.com to remove the school official

   1) The request should be made by an active school official or contact

4. How to Add a Contact

   To add a contact, go to the Navigation Buttons and click on **Maintenance.** You will see the drop-down menu below. Click on **Contact List**

   1) Click “Search”
2) Click “New”

3) **Contact Information:** This screen is the contact information screen. Items marked in red are required

- The contact will receive an email the following day with instructions on how to login and access the provider MyProfile account

5. **How to Change a Contact’s System Permissions**

To change a contact’s system permission, you must first create a User Group (User Permission) to assign the contact

1) **Creating a New User Group**

Go to the Navigation Buttons and click on **Maintenance**. You will see the drop-down menu below. Hover over “**System Management**” until a second box appears and then click on “**System Security**”
• Click “New”

![Image of system security interface]

• Enter a name for the new User Group and click “Save”

![Image of user group detail interface]

• The User Group will now appear under System Security. Click “View” under the User Group permissions

![Image of system security interface with new user group]
Check any permissions you would like to set for the User Group

2) Changing a User Group’s Permissions

Go to the Navigation Buttons and click on Maintenance. You will see the drop-down menu below. Hover over “System Management” until a second box appears and then click on “System Security”

Click “View” for the user group’s permissions you would like to review
• Check or uncheck any permission you would like to set for this group of users. Click “Save”

3) How to Change a Contact’s Permissions

Go to the Navigation Buttons and click on Maintenance. You will see the drop-down menu below. Click on “Contact List”

• Click “Search”
• Use the drop-down menu under “Group” to set the appropriate level of permissions. Click “Save”

WARNING: One option under Group is (none). This option removes all access from that user. Be careful not change all users to (none) as you will no longer have access to your provider account.

6. How to Remove (Inactivate) a Contact

To remove a contact, go to the Navigation Buttons and click on Maintenance. You will see the drop-down menu below. Click on “Contact List”

1) Click “Search”
2) Check the name of individual you would like to remove, or inactivate. Click “Inactive”

3) A Message will appear “Are you sure you want to inactivate the selected records?” Click “Ok”. The contact will now be inactive on the provider account.

7. How to Reactivate a Contact

Go to the Navigation Buttons and click on Maintenance. You will see the drop-down menu below. Click on “Contact List”

1) Click “Search”
2) Click “All Other Statuses”

3) Contact List:

1. Check the name of individual you would like to reactivate.
2. Use the drop down menu under “Group” to set the appropriate level of user permission.
3. Click “Active”
Your Company’s profile is maintained online. The information you provide is used by the Department to customize your personal contact method.

1. How to View and Update the Company (Provider)’s Profile

Go to the Navigation Buttons and click on Maintenance. You will see the drop-down menu below. Click on “Provider Profile”

1) You will be able to update the Company (Provider)’s contact information, such as

- Provider DBA
- FEIN number
- Business Address
- Mailing Address
- Email
- Phone Number

2) To update the Company (Provider)’s business name, you will need to send an email to:

education@myfloridacfo.com
2. How to View the Company (Provider)’s Payment History

Go to the Navigation Buttons and click on **Maintenance**. You will see the drop-down menu below. Hover over “**System Management**” until a second box appears and then click on “**Payment History**”

- A listing of the course name, type, fee, receipt number and date will appear

3. How to View and Update the User’s Profile

Go to the Navigation Buttons and click on **Customize**. You will see the drop-down menu below. Click on “**My Profile**”

1) You will be able to update your user contact information such as mailing address, email and phone number
4. How to View and Update the User’s Preferred Contact Method

Go to the Navigation Buttons and click on Customize. You will see the drop-down menu below. Click on “Notices”

1) Choose your preferred contact method and confirm your email address

- In-Box or Email
- HTML or Plain Text