

# PROVIDER MyProfile

## *Welcome Packet*

Division of Agent and Agency Services

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](#)

Maintaining MyProfile – Adding/Removing School Officials and Contacts

[Who Should be Listed as a School Official or Contact in the Provider Account](#)

[How to Add a School Official/Bail Bond Supervising Instructor](#)

[How to Remove a School Official](#)

[How to Add a Contact](#)

[How to Change a Contact's System Permissions](#)

[How to Remove \(Inactivate\) a Contact](#)

[How to Reactivate a Contact](#)

Getting Started – Submitting a Course

[Course Reminders](#)

[How to Submit a Course](#)

[Approved Courses](#)

[How to View the Payment History](#)

Getting Started – Submitting a Course Offering

[Course Offering Reminders](#)

[How to Submit a Course Offering](#)

[Approved Course Offerings](#)

Getting Started – Submitting a Roster

[Roster Reminders](#)

[How to Submit a Roster](#)

Getting Started – Instructors

[Instructor Reminders](#)

[Instructor Qualifications](#)

[Instructor Applications](#)

Maintaining MyProfile – Provider Profile

[How to View and Update the Profile](#)

[How to View and Update the User's Profile](#)

[How to View and Update the User's Preferred Contact Method](#)

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

# Getting Started -

Accessing Your Provider *MyProfile* Account

*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:

Google Chrome or Microsoft Edge are the optimal browsers to use in your DICE Provider account. Our system is not compatible with mobile browsers (phone, tablet or other mobile devices).

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](https://dice.fldfs.com/public/pb_index.aspx).



Trouble logging in?

Utilize the **Forgot Password** Function!

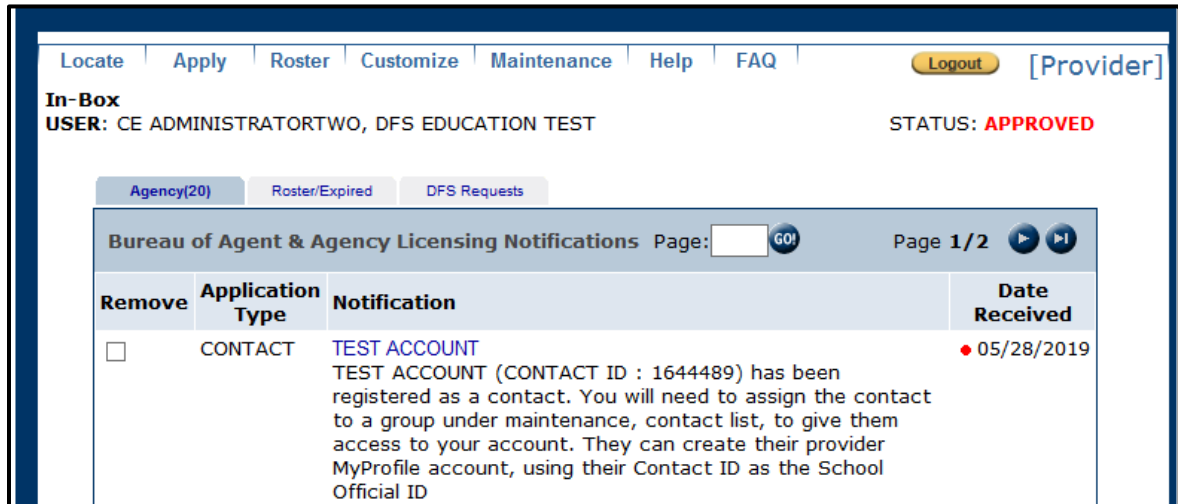
## 2. Provider Account:

Select the **“Provider Account”** and select **“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.

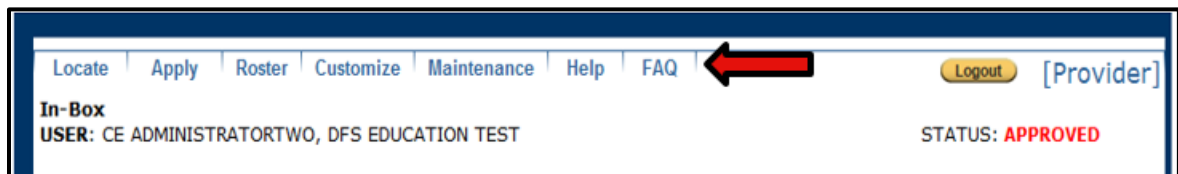


The screenshot shows the 'In-Box' section of the provider interface. At the top, there are navigation tabs: Locate, Apply, Roster, Customize, Maintenance, Help, and FAQ. A 'Logout' button and a '[Provider]' link are on the right. Below the tabs, the 'In-Box' header shows 'USER: CE ADMINISTRATORTWO, DFS EDUCATION TEST' and 'STATUS: APPROVED'. The main content area has three tabs: 'Agency(20)', 'Roster/Expired', and 'DFS Requests'. The 'Agency(20)' tab is selected. Below the tabs is a table titled 'Bureau of Agent & Agency Licensing Notifications'. The table has columns: 'Remove', 'Application Type', 'Notification', and 'Date Received'. A single notification is listed with the application type 'CONTACT' and the date '05/28/2019'. The notification text states: 'TEST ACCOUNT (CONTACT ID : 1644489) has been registered as a contact. You will need to assign the contact to a group under maintenance, contact list, to give them access to your account. They can create their provider MyProfile account, using their Contact ID as the School Official ID'.

Remove	Application Type	Notification	Date Received
<input type="checkbox"/>	CONTACT	TEST ACCOUNT (CONTACT ID : 1644489) has been registered as a contact. You will need to assign the contact to a group under maintenance, contact list, to give them access to your account. They can create their provider MyProfile account, using their Contact ID as the School Official ID	05/28/2019

### 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.




This screenshot is identical to the one above, but with a red arrow pointing to the 'FAQ' navigation button in the top menu bar.

# Maintaining MyProfile -

## Adding/Removing *School Officials* and *Contacts*


### 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 own unique login and password to access MyProfile.**

What is the difference between a *School Official*, *Supervising Instructor* and a *Contact*?

- 1) **‘School official’** means an individual designated as provided in Rule 69B-228.050, F.A.C., by a provider and approved by the Department who is responsible for the acts of the provider, including, but not limited to, the provider’s instructors and speakers and is subject to administrative action pursuant to Rule 69B-228.210, F.A.C.

 To become a school official, an application has to be submitted.

- 2) A **“Supervising Instructor”** is the School Official for **Bail Bond** providers with additional responsibilities as listed in the 2<sup>nd</sup> bullet below.

 To become a supervising instructor, an application has to be submitted 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 **Bail Bond** 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.

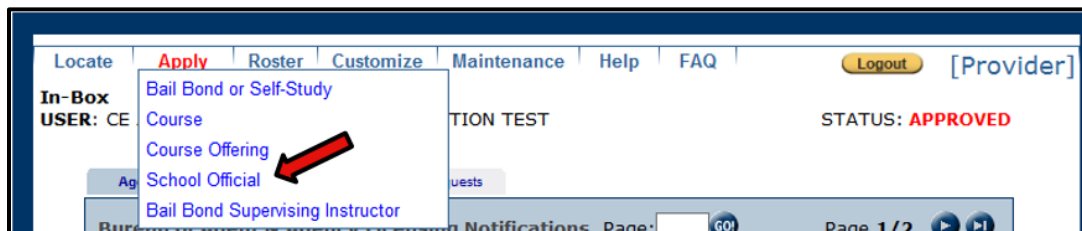
- 3) A **Contact** works under a school official and is not responsible for the actions of the provider.
  - a) Contacts do not need to complete an application.
  - b) Contacts can have different access, or permission in the provider MyProfile account depending on each provider's preference.
  - c) Contacts can be added or removed at any time.

## 2. How to Add a **School Official** or **Bail Bond** Supervising Instructor:

- 1) School officials require a **submitted** school official **Bail Bond** supervising instructor application.

The application can be added directly through your provider MyProfile account.

Go to the Navigation Buttons and select on **"Apply"**. You will see the drop-down menu below. Select **"School Official"**.



- 2) **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.

- 3) **Background Questions:** Every applicant must answer the background questions shown below.

Locate Apply Roster Customize Maintenance Help FAQ Logout [Provider]

In-Box > School Official/Supervising Instructor Application  
USER: CE ADMINISTRATORTWO, DFS EDUCATION TEST

Identification Demographics **Background Questions** Confirmation

**BACKGROUND QUESTIONS**

INSTRUCTIONS

Has this individual ever been convicted or pled nolo contendere to a felony?

☐ Yes  
☐ No

Exit Next

DFS-H2-1137

Locate Apply Roster Customize Maintenance Help FAQ Logout [Provider]

In-Box > School Official/Supervising Instructor Application  
USER: CE ADMINISTRATORTWO, DFS EDUCATION TEST

Identification Demographics **Background Questions** Confirmation

**BACKGROUND QUESTIONS**

INSTRUCTIONS

Has an administrative action ever been taken against you for violation of statutes or rules in Florida or any other state?

☐ Yes  
☐ No

Exit Next

DFS-H2-1137

Locate Apply Roster Customize Maintenance Help FAQ Logout [Provider]

In-Box > School Official/Supervising Instructor Application  
USER: CE ADMINISTRATORTWO, DFS EDUCATION TEST

Identification Demographics **Background Questions** Confirmation

**BACKGROUND QUESTIONS**

INSTRUCTIONS

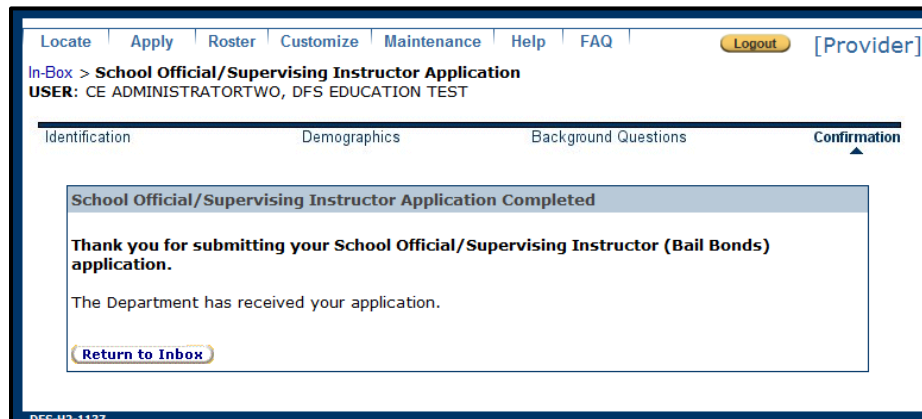
Is this individual employed by the Florida Department of Financial Services?

☐ Yes  
☐ No

Exit Submit

DFS-H2-1137

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



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

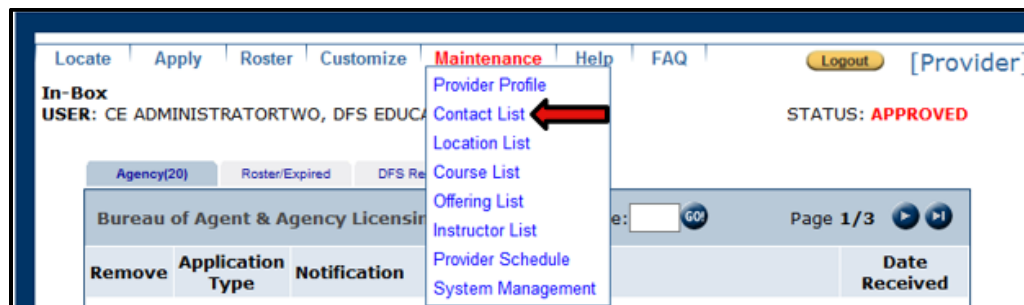
### 3. How to Remove a School Official:

If a school official no longer works for the provider, e-mail the Department at [Education@MyFloridaCFO.com](mailto:Education@MyFloridaCFO.com) to remove the school official.

★ The request should be made by an **active** school official.

### 4. How to Add a Contact:

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



- 1) Select "New".

Locate | Apply | Roster | Customize | Maintenance | Help | FAQ | [Logout](#) [Provider]

In-Box > **Contact List**  
**USER:** CE ADMINISTRATORTWO, DFS EDUCATION TEST

User Group: (All) [Search](#) [First Time Provider Registration Checklist](#)

Contact List [Active   All Other Statuses]		
Full Name	Type	Group
<input type="checkbox"/> TEST ACCOUNT		Test Group
<input type="checkbox"/> CE ADMINISTRATORTWO	OFFICIAL	Administrator
<input type="checkbox"/> ALISON BONNELL		Administrator
<input type="checkbox"/> CONSUMER SERVICES	OFFICIAL	Consumer Services

[Save](#)

[New](#) [Inactive](#)

2) Demographics Screen: This screen is the contact demographic screen.

Items marked in **red** are required.

**Contact Information**

**SSN**

**Date of Birth**  (mm/dd/yyyy)

**First Name**

Middle Name

**Last Name**

Suffix

Title

**Business Address**  200 EAST GAINES STREET

**City**  TALLAHASSEE

**State**  FLORIDA

**County**  Leon

**Zip**  32399

**Mailing Address**  200 EAST GAINES STREET

**City**  TALLAHASSEE

**State**  FLORIDA

**County**  Leon

**Zip**  32399

**E-mail**

Alternate E-mail

**Phone**   Extension

Fax

Status ☒ Active

[Save](#)

3) The provider will receive an inbox notification with instructions regarding their permissions and how to create a login to access the provider MyProfile account.



Remove	Application Type	Notification	Date Received
<input type="checkbox"/>	CONTACT	<a href="#">TEST ACCOUNT</a> TEST ACCOUNT (CONTACT ID : 1644489) has been registered as a contact. You will need to assign the contact to a group under maintenance, contact list, to give them access to your account. They can create their provider MyProfile account, using their Contact ID as the School Official ID	● 05/28/2019

## 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 select "**Maintenance**". You will see the drop-down menu below. Hover over "**System Management**" until a second box appears and then select "**System Security**".



### 2) Select "New".



- 3) Enter a name for the new User Group and select “Save”.

Locate | Apply | Roster | Customize | Maintenance | Help | FAQ | Logout [Provider]

In-Box > System Security > User Group Detail  
USER: CE ADMINISTRATORTWO, DFS EDUCATION TEST

User Group Detail

Group Name  X

Status ☒ Active

Save

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- 4) The User Group will now appear under “System Security”. Select “View” under the User Group permissions.

Locate | Apply | Roster | Customize | Maintenance | Help | FAQ | Logout [Provider]

In-Box > System Security  
USER: CE ADMINISTRATORTWO, DFS EDUCATION TEST

System Security [Active | Inactive]

User Group	Permissions
<input type="checkbox"/> Administrator	View
<input type="checkbox"/> Analysts	View
<input type="checkbox"/> CAU	View
<input type="checkbox"/> Managers	View
<input type="checkbox"/> Consumer Services	View
<input type="checkbox"/> Type User Group Name Here	View

New Inactive

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- 5) Select any permissions you would like to set for the User Group.

Locate | Apply | Roster | Customize | Maintenance | Help | FAQ | Logout [Provider]

In-Box > System Security > System Permissions  
USER: CE ADMINISTRATORTWO, DFS EDUCATION TEST

Permissions for Group Type User Group Name Here

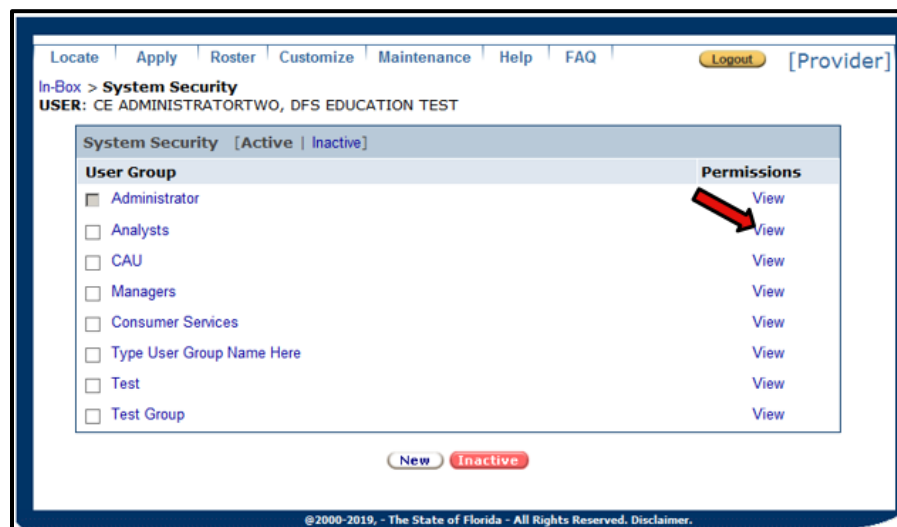
Page	<input type="checkbox"/> Read	<input type="checkbox"/> Write
Additional Course Authority Request 1	<input type="checkbox"/>	<input type="checkbox"/>
Address History	<input type="checkbox"/>	<input type="checkbox"/>
Address History	<input type="checkbox"/>	<input type="checkbox"/>
Address History	<input type="checkbox"/>	<input type="checkbox"/>
Address History	<input type="checkbox"/>	<input type="checkbox"/>

## 6. Changing a User Group’s Permissions:

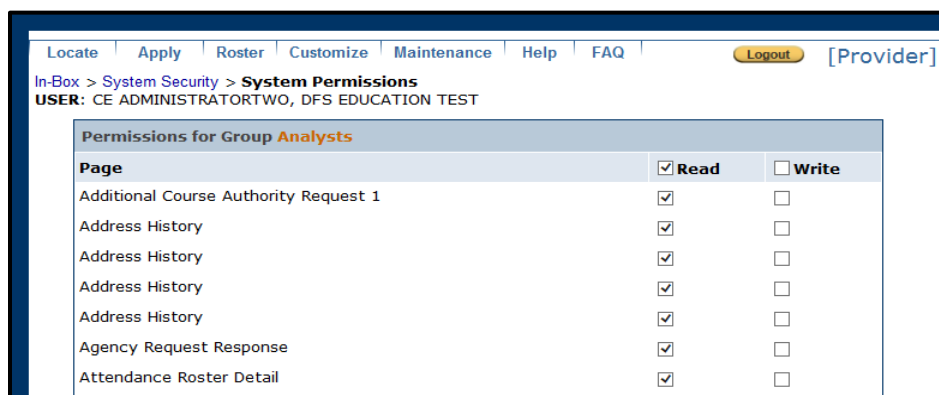
- 1) Go to the Navigation Buttons and select **"Maintenance"**. You will see the drop-down menu below. Hover over **"System Management"** until a second box appears and then select **"System Security"**.



- 2) Select **"View"** for the user group's permissions you would like to review.

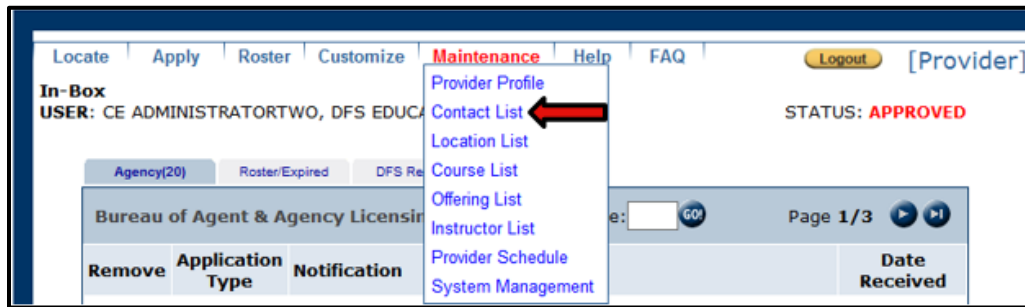


- 3) Select or unselect any permission you would like to set for this group of users. Select **"Save"**.

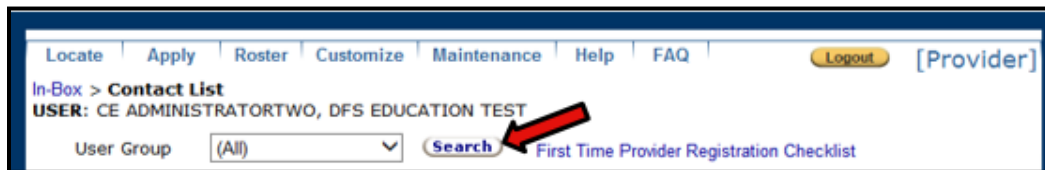


## 7. How to Change a Contact's Permissions:

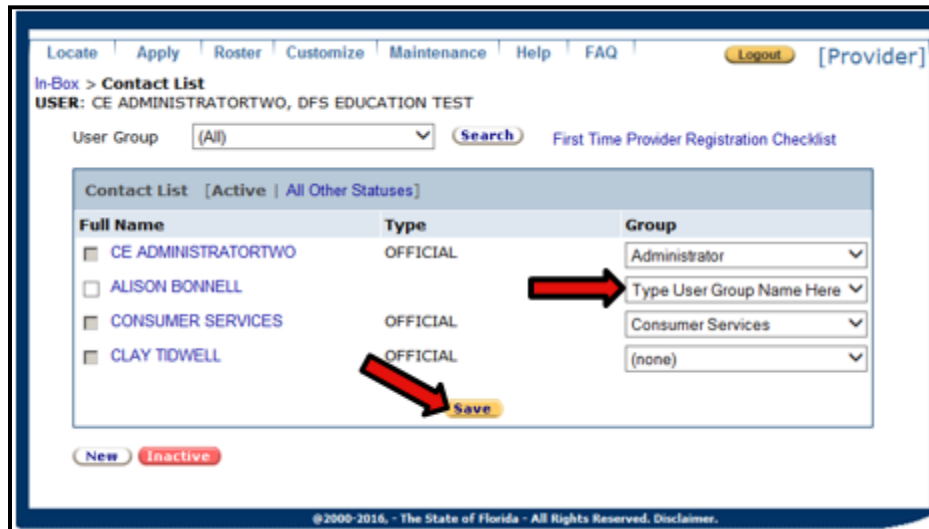
- 1) Go to the Navigation Buttons and select **Maintenance**. You will see the drop-down menu below. Select **“Contact List”**.



- 2) Pick a 'User Group' from the drop-down and select **‘Search’** or leave at the default 'All'.



- 3) Use the drop-down menu under **“Group”** to set the appropriate level of permissions.



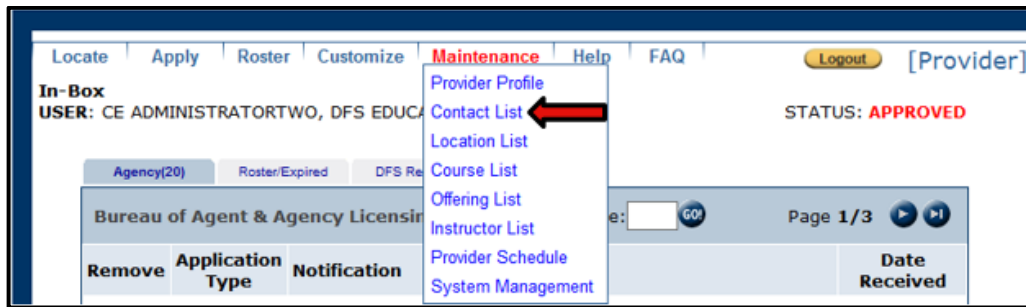
- 4) Select **“Save”**.



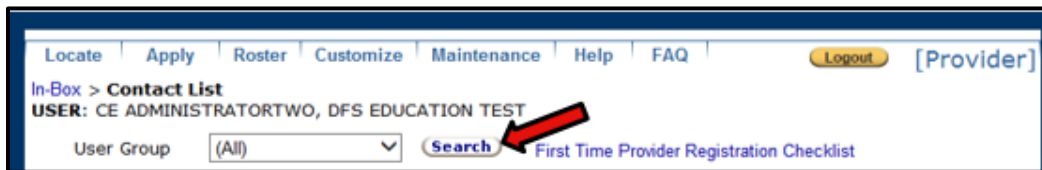
**WARNING:** One option under Group is (none). This option removes all access from that user. **Be careful not change all users to (none) as you will no longer have access to your provider account.**

#### 8. How to Remove (Inactivate) a Contact:

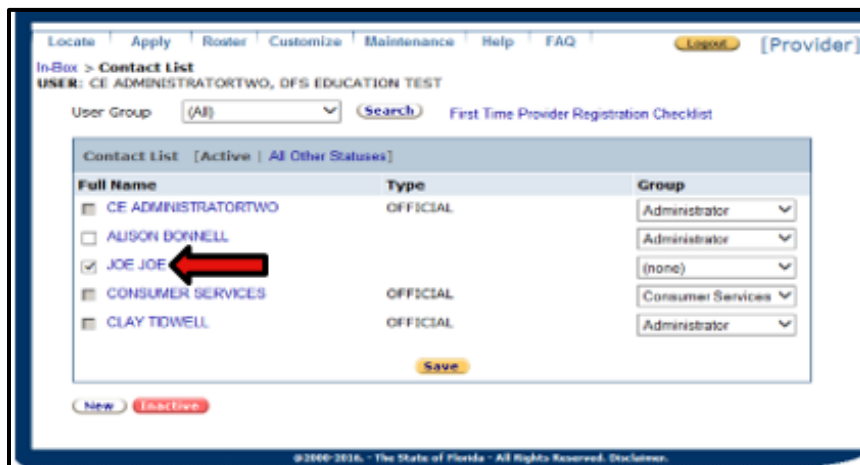
- 1) Go to the Navigation Buttons and select on “Maintenance”. You will see the drop-down menu below. Select ‘Contact List’.



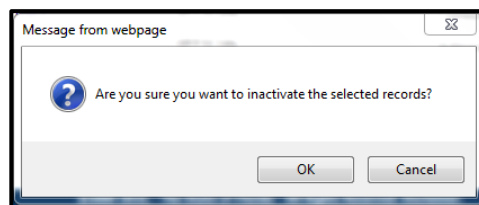
- 2) Select ‘Search’.



- 3) Select the name of the individual you would like to remove or inactivate. Select “Inactive”.

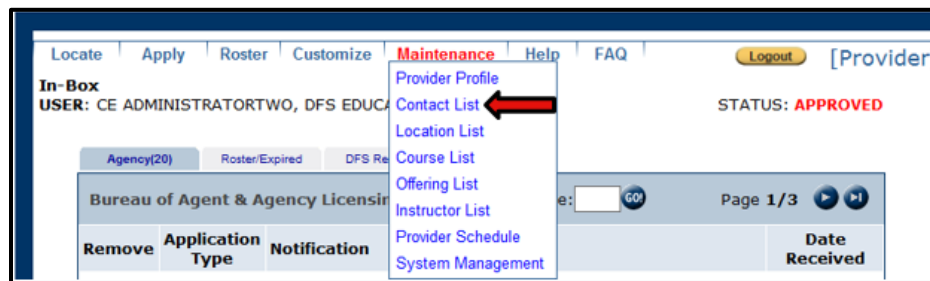


- 4) A message will appear “Are you sure you want to inactivate the selected records?”. Select “Ok”. The contact will now be inactive under the Provider’s account.

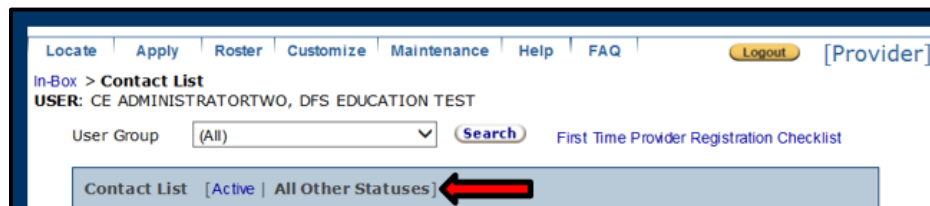


## 9. [How to Reactivate a Contact:](#)

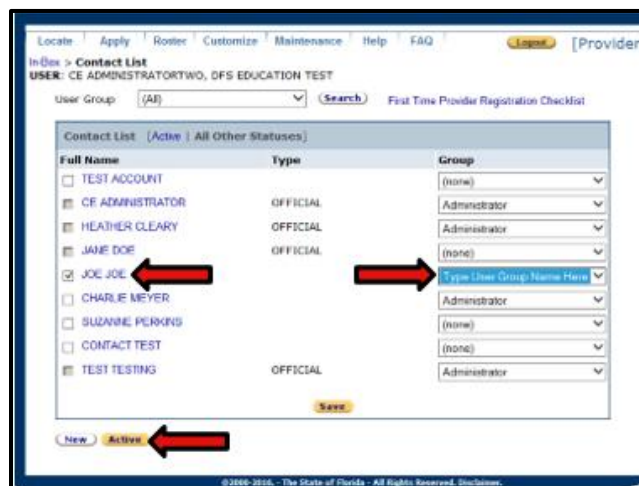
- 1) Go to the Navigation Buttons and select '**Maintenance**'. You will see the drop-down menu below. Select '**Contact List**'.



- 2) Select "All Other Statuses".



- 3) Contact List:
  1. Select the name individual you would like to reactivate.
  2. Use the drop down menu under "Group" to set the appropriate level of user permission.
- 4) Select "Active".



# Getting Started -

Submitting a *Course*

Now that you are able to access your MyProfile account, you are ready to submit a course to the Department.

1. Course Reminders:

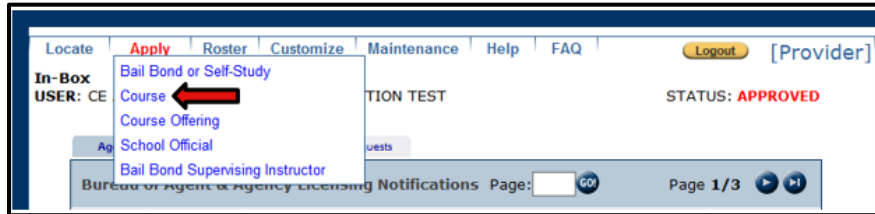
Before submitting a course, below are a few *reminders*.

- 1) Courses should be submitted for continuing education approval at least **70** days prior to the course being offered.
  - a) The course review can take up to 60 days
  - b) The course offering must be submitted 5 business 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:
  - a) Organizational procedures and internal policies of an insurer or any other employer.
  - b) Motivation.
  - c) Salesmanship or sales promotion including marketing and courses which are primarily intended to impart knowledge of specific products or of specific companies.
  - d) Courses in mechanical office or business skills (i.e. typing, speed racing, etc.)
  - e) The use of calculators or other machines or equipment.
  - f) 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.
  - g) Accounting or tax preparation in connection with the internal business of the licensee.
  - h) Courses in communication, time management or stress management.
  - i) Proposed Legislation or other speculative content.

*You can review course requirements in Department Rule 69B-228.080, F.A.C.*

## 2. How to Submit a Course:

- 1) Go to Navigation Buttons and select “**Apply**”. You will see the drop-down menu below. Select “**Course**”.



- 2) Demographics Screen: This screen is an overview of the course application.

★ Items marked in **red** are required

A screenshot of the 'Course Application' demographics screen. The page has a navigation bar with 'Locate', 'Apply', 'Roster', 'Customize', 'Maintenance', 'Help', and 'FAQ'. The user is logged in as 'CE ADMINISTRATORTWO, DFS EDUCATION TEST'. The page title is 'In-Box > Course Application 1'. Below the title, there are tabs: 'Demographics', 'Course Authority Selection', 'Attachments', 'Payment', and 'Confirmation'. The 'Demographics' tab is active. The form contains the following fields: 'Course Name' (required, red text), 'Description', 'Course Type' (radio buttons for 'Continuing Education' and 'Pre-licensing'), 'Study Method' (dropdown menu), 'Course Level' (dropdown menu), 'Subject Area' (dropdown menu), and 'Comments'. A 'Next' button is at the bottom right.



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; Pre-Licensing or Continuing Education.
- ❖ **Study Method:**

1. **Classroom** – Classroom courses must be taught by a FL registered instructor.

Classroom courses expire after they are not offered for two (2) years.

2. **Self-study Correspondence** – Self-study courses taught by book or other correspondence method. A registered instructor is not required; however, a final exam is required.

Self-study Correspondence courses expire once they are not offered for two (2) years.

3. **Self-study Online** – Self-study courses taught online. A registered instructor is not required; however, a final exam is required.

Self-study Online courses expire once they are not offered for 2 years.

4. **Seminar-Full** – Guest speakers are allowed; however, a registered instructor in the course authority being taught must be present.

Seminar courses expire one (1) year from the approval date.

5. **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 (1) year from the approval date.

**IMPORTANT NOTE:** Regardless of the study method of the course, all 4-hour Law & Ethics Update courses expire one (1) year from the approval date.

- ❖ **Course Level:** Course difficulty level shall be determined based on the experience level of the licensee that the course was designed to serve.

This field is grayed out for pre-licensing courses as all pre-licensing courses are basic level.

- ❖ **Comments:** Any comments you would like the Department to know regarding the course.

*If the course is approved as a Classroom-Webinar and the Provider only intends to present the Classroom portion, please include comments.*

- 3) Select “**Next**” to continue.

- 4) **Course Authority Selection:** This screen will allow you to choose the course authority and the requested hours of CE credit.

Documents should be submitted as a **PDF** or **Word** doc (97-2003 version) no larger than **5MB**

- 5) Select “Next” to continue.
- 6) **Attachments:** This screen will allow you to attach course documents.

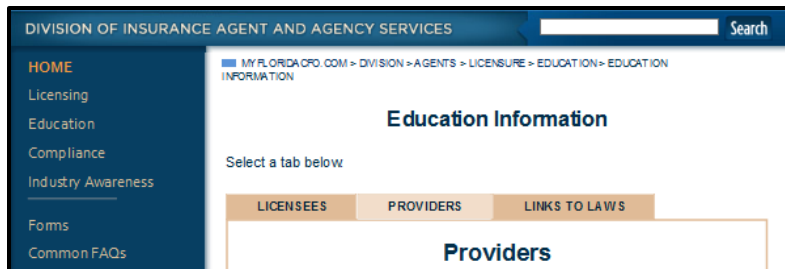
You may submit as **many** documents as needed!

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>

- 📄 Select the “Providers” tab under “Education Information”.

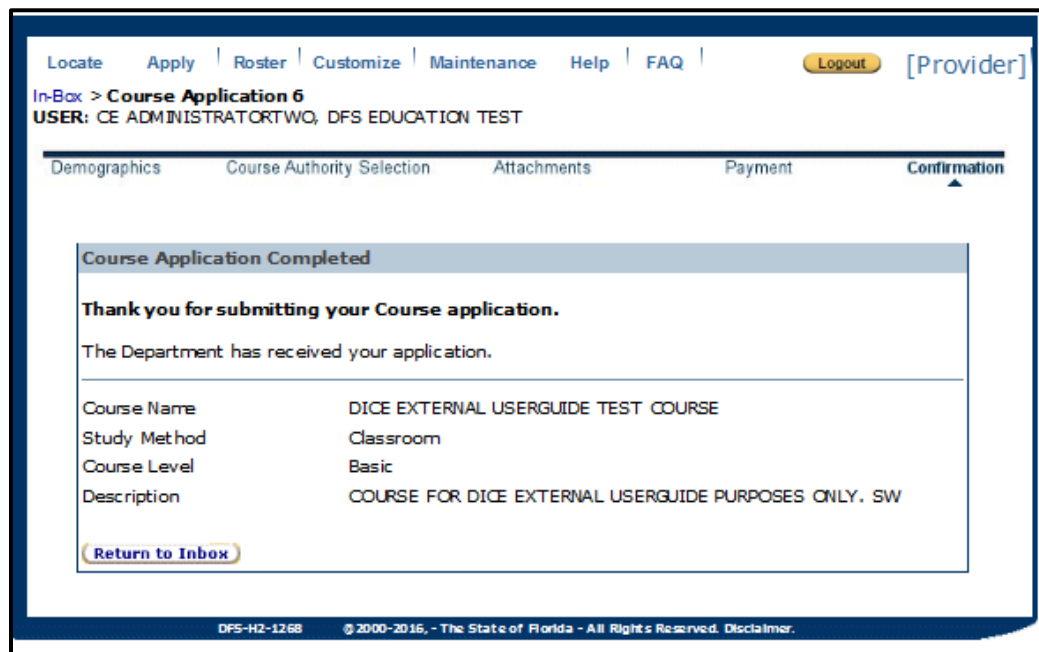


- 7) **Payment:** This screen provides the Payment Summary for the course.

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.

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



- 9) **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.

Locate | Apply | Roster | Customize | Maintenance | Help | FAQ | Logout [Provider]

**In-Box**  
 USER: CE ADMINISTRATOR TWO, DFS EDUCATION TEST STATUS: **APPROVED**

Agency | Roster/Expired | **DFS Requests**

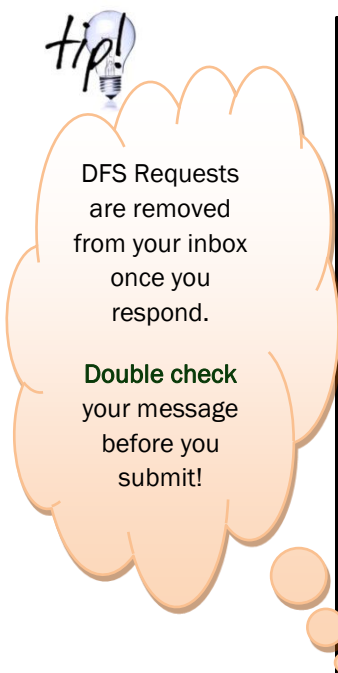
Bureau of Agent & Agency Licensing Notifications

Application Type	Name	Date Received
COURSE	DICE EXTERNAL USERGUIDE TEST COURSE	02/02/2016

● Less than 5 days in In-Box.  
 ● Between 5 and 20 days in In-Box.  
 ● More than 20 days in In-Box.

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- Select the **Course Name** to review the **DFS Request**.
- Review “**Information Requested**” to determine the information needed to complete the course review.



Locate | Apply | Roster | Customize | Maintenance | Help | FAQ | Logout [Provider]

**In-Box > Agency Request Response**  
 USER: CE ADMINISTRATOR TWO, DFS EDUCATION TEST

Course **DICE EXTERNAL USERGUIDE TEST COURSE**

Date Requested 02/02/2016

Provider Name DFS EDUCATION TEST

Provider FEIN 01-0000001

**Information Requested** THIS TEXT WILL INCLUDE THE INFORMATION NEEDED TO APPROVE YOUR COURSE, THE REQUESTED RESPONSE DATE AND THE DFS ANALYSTS NAME AND PHONE NUMBER.

Provider Response

Attach Documents Click the "Attach" button to load a pop-up window where you will select the file you want to upload. When you submit your response, the attached files will automatically be enclosed.

Attach Remove

Submit

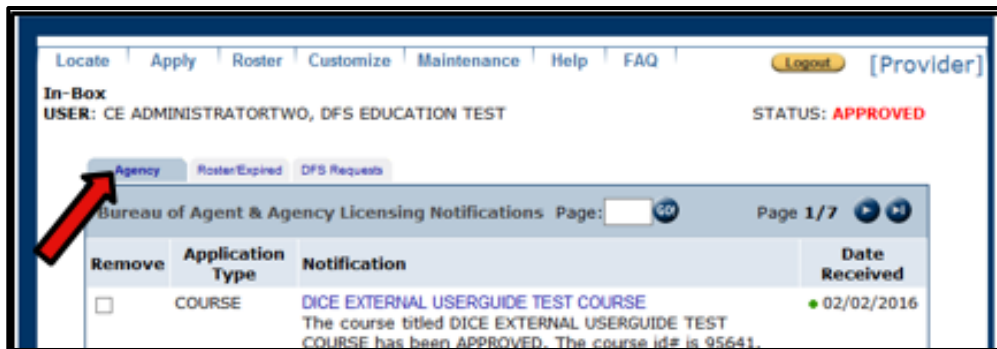
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- Provider Response:** Type your response to the **DFS Request**.
- Attach Documents:** Attach any requested documents.
- Select “**Submit**”. The “**Provider Response**” will be reviewed within **3** business days.

**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.

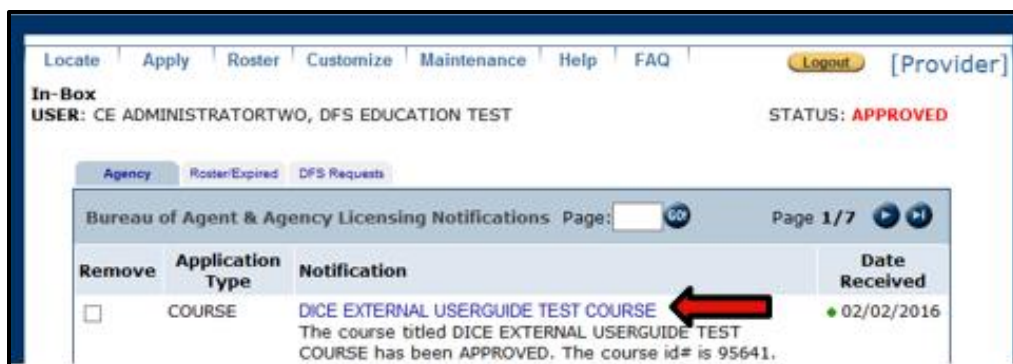
#### 10) **Approved Courses:**

Once the course has been approved, you will receive a notification in the **Agency** tab of the **Home Page**.

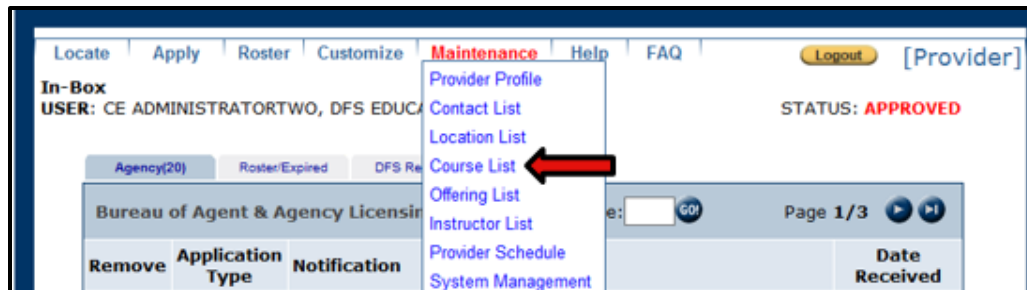


# 11) Viewing Approved Courses:

- a) To view the approved course, select the blue “[Notification](#)” link in the **Agency** tab of the Home Page.



- b) To view a listing of all of your approved courses, go to the Navigation Buttons and select Maintenance. You will see the drop-down menu below. Select “[Course List](#)”.



- c) Select “**Search**” to view all of your courses.
- d) Select To narrow your search, you can select:
  - i. Course Authority
  - ii. Course Number
  - iii. Course Name

Having trouble remembering a course name?

Try a word search using  
“%”



The screenshot shows the 'Course List' page with the following search criteria:

- Course Authority: (ALL)
- Course Number: (empty)
- Course Name: %course
- Subject Area: (ALL)

The search results table is as follows:

ID	Course Name	Study Method	Offering
95641	95641 - DICE EXTERNAL USERGUIDE TEST COURSE	Classroom	View
89449	89449 - DFS EDUCATION COURSE 6-12	Classroom	View

e. The course list defaults to “Active” courses. Select “All Other Statuses” to review closed, expired and pending courses.

The screenshot shows the 'Course List' page with the 'All Other Statuses' tab selected, indicated by a red arrow. The search criteria are the same as in the previous screenshot. The search results table is as follows:

ID	Course Name	Study Method	Offering
95641	95641 - DICE EXTERNAL USERGUIDE TEST COURSE	Classroom	View
93770	93770 - FSDFAFSD	Self-Study Online	View
89449	89449 - DFS EDUCATION COURSE 6-12	Classroom	View



Do you want to **clean-up** your course list?

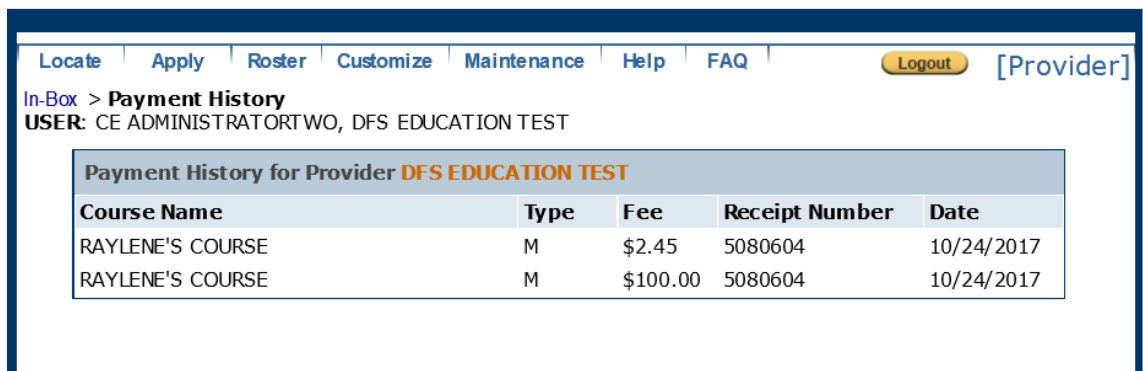
If you are no longer offering a course listed in your “Active” course list, e-mail us a request to close your course making sure to include the course ID number. E-mail [Education@MyFloridaCFO.com](mailto:Education@MyFloridaCFO.com) and we will close the course for you!

### 3. How to View the Payment History:

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



\$ A listing of the course name, type, fee, receipt number and date will appear.



# Getting Started -

## Submitting a *Course Offering*

### 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** business days prior to the course being offered.

- ❖ Course offerings can be submitted up to one (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 a registered instructor.
- ❖ **Seminar** courses allow guest lecturers; however, they must have a registered instructor present in the course authority being taught.

- ✓ The registered instructor(s) must be listed on the course offering application.
- ✓ The guest lecturer(s) bios/resumes must be on file with the approved course.
- ✓ The registered instructor listed on the course offering must be the same registered instructor that teaches the course. More than one (1) registered instructor can be listed on a course offering.

- ❖ **Self-study** courses do not require an instructor to be listed; however, if the course is Blended (part Self-Study, part Classroom), the registered instructor associated with the classroom portion of the course should be listed on the offering.

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

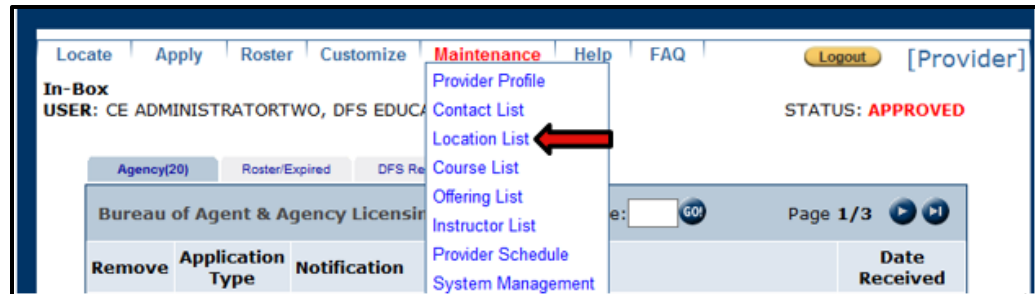
- ✓ If an instructor changes
- ✓ If the date changes
- ✓ If the time changes
- ✓ If the location changes

- ❖ **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 Chapter 69B-228.090(2), F.A.C.



2. **Course Location:** Add the course location to the “**Location List**”.

- 1) Go to the Navigation Buttons and select “**Maintenance**”. You will see the drop-down menu below. Select “**Location List**”.



- 2) Select “**New**”. You will see the Location Detail Screen below. Once all items are completed, select “**Save**”.

❖ Items marked in **red** are required.

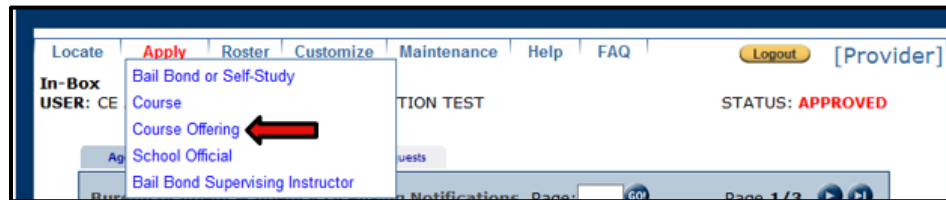
A screenshot of the Location Detail form. The form is titled "Location Detail" and contains several fields for location information. The fields are: Location Name (required), Building Name, Street Address (required), Building #, City, State (dropdown menu), County (dropdown menu), Region (dropdown menu), Zip, Location Phone, and Status. The Status field has a checkbox for "Active". There is also a "Comments" section with a text area. A "Save" button is at the bottom right. The footer of the form says "© 2000-2016, - The State of Florida - All Rights Reserved. Disclaimer."

- 3) The location is now saved in the provider “**Location List**” and is ready for use in the course offering.

A screenshot of the Location List screen. The top navigation bar is the same as the previous screenshots. The main content area shows the user's name, CE ADMINISTRATORTWO, DFS EDUCATION TEST. Below this, there is a section titled "Location List" with a sub-header "To view and/or edit a provider location, click on the location name." There are two tabs: "Location List" and "All Other Statuses". The "Location List" tab is active. Below the tabs, there is a table with one row showing a location for DFS. The location details are: 200 EAST GAINES ST, TALLAHASSEE, FLORIDA 32399, (Leon) Region: 1, Phone: (850) 413-5355. At the bottom of the table, there are buttons for "New" and "Inactive". The footer of the screen says "© 2000-2016, - The State of Florida - All Rights Reserved. Disclaimer."

### 3. How to Submit a Course Offering:

Go to the Navigation Buttons and select "**Apply**". You will see the drop-down menu below. Select "**Course Offering**".



#### 1) **Offering Application:**

This screen is an overview of the course offering application.

Items marked in **red** are required.

A screenshot of the 'Offering Application' form. The form is titled 'Offering Application' and includes fields for 'Course' (a dropdown menu), 'Program Type' (a dropdown menu), 'Instructor ID' (a text field with a 'Search' button), 'Instructor Name' (a text field showing 'Instructor ID not found' and an 'Add' button), and 'Selected Instructors' (a list area with a 'Remove' button). Below these are fields for 'Date' (two date pickers), 'Day of Week' (checkboxes for Sun through Sat), 'Time' (two time pickers), 'Lunch Break' (two time pickers), 'Location' (a dropdown menu), and 'Comments' (a text area). At the bottom, there is a checkbox for 'Does this offering replace another offering (e.g., correction)?' and a 'Submit' button. A note at the bottom states: '\*\* Note: Replacing an existing offering will immediately close/cancel that offering.' The footer of the page includes 'DFS-H2-397' and '© 2000-2016, The State of Florida - All Rights Reserved. Disclaimer.'

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

2) Do you need to make a change to a course offering: Instructors, Time, Location, etc.?

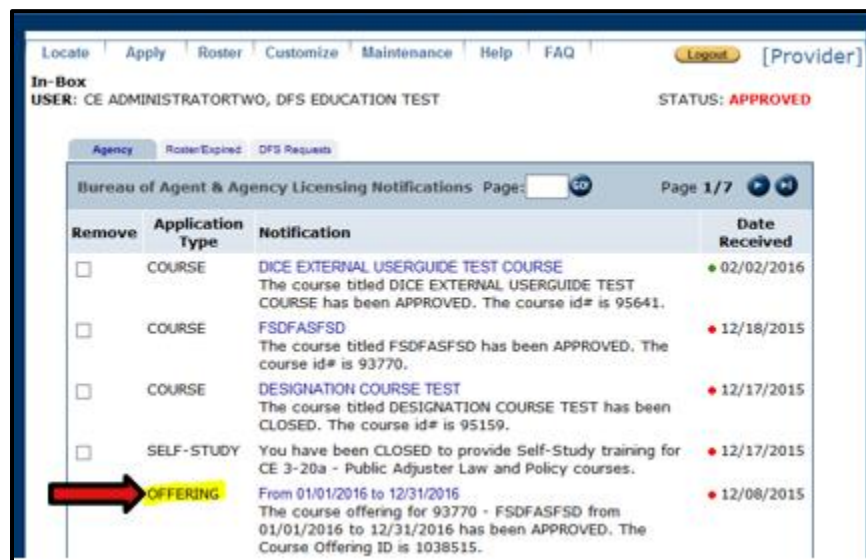
Complete the Section: **“Does this offering replace another offering (e.g., correction)?”**

- ✓ Select **“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 select **“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 offering applications must be submitted to the Department at least 5 business days but no more than 1 year, prior to the date and time the course is offered. You will receive a notification under the **Agency** tab of the Home Page showing the course offering has been approved.

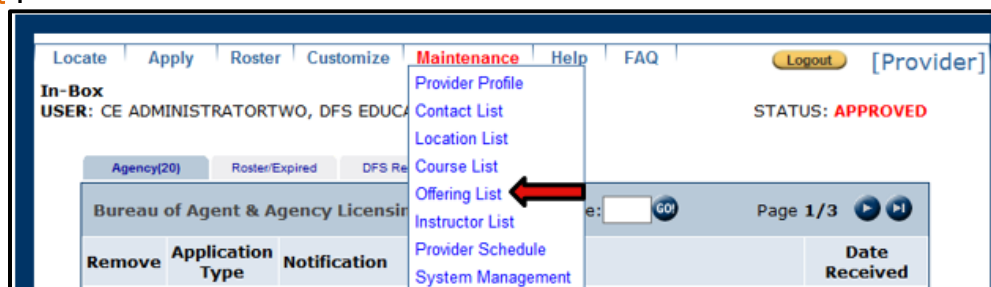


The screenshot shows the 'Bureau of Agent & Agency Licensing Notifications' page. It features a table with columns: Remove, Application Type, Notification, and Date Received. The table lists several approved course offerings. A red arrow points to the 'OFFERING' column header.

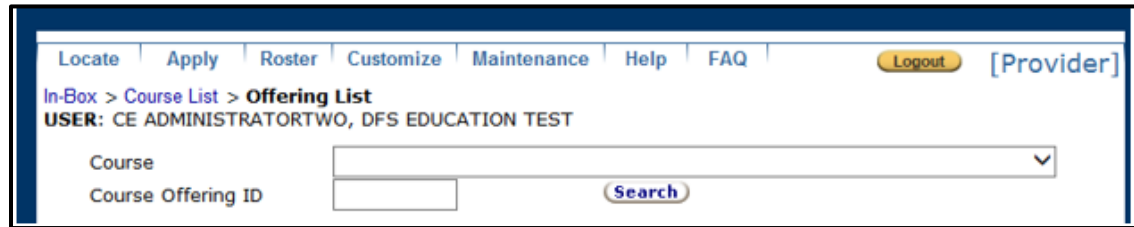
Remove	Application Type	Notification	Date Received
<input type="checkbox"/>	COURSE	DICE EXTERNAL USERGUIDE TEST COURSE The course titled DICE EXTERNAL USERGUIDE TEST COURSE has been APPROVED. The course id# is 95641.	02/02/2016
<input type="checkbox"/>	COURSE	FSDFAFSD The course titled FSDFAFSD has been APPROVED. The course id# is 93770.	12/18/2015
<input type="checkbox"/>	COURSE	DESIGNATION COURSE TEST The course titled DESIGNATION COURSE TEST has been CLOSED. The course id# is 95159.	12/17/2015
<input type="checkbox"/>	SELF-STUDY	You have been CLOSED to provide Self-Study training for CE 3-20a - Public Adjuster Law and Policy courses. From 01/01/2016 to 12/31/2016 The course offering for 93770 - FSDFAFSD from 01/01/2016 to 12/31/2016 has been APPROVED. The Course Offering ID is 1038515.	12/17/2015 12/08/2015

#### 5. Reviewing Approved Course Offerings:

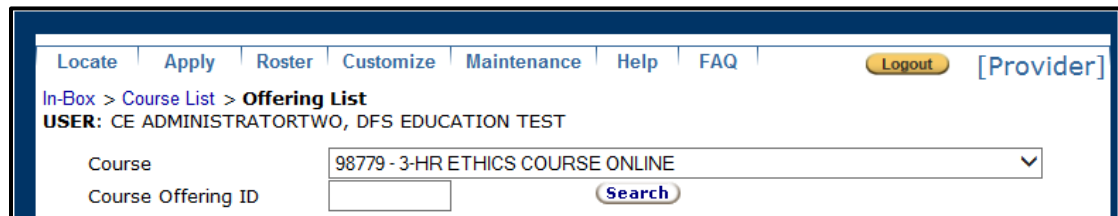
- 1) To view a listing of all of your approved course offerings, go to the Navigation Buttons and select **“Maintenance”**. You will see the drop-down menu below. Select **“Offering List”**.




- 2) You can search by “Course” or “Course Offering ID”.



- 3) To search by Course, select the course you would like to view the course offerings for and select “Search”.



- 4) The default view is “Active” course offerings “All Other Statuses” shows closed, cancelled and expired course offering.



ID	Offering Date(s)	Location	Status
1089228	07/03/2018 - 07/03/2018	YOUR HOUSE	Closed
1080087	01/10/2018 - 01/10/2018	K2	Closed
1088729	06/19/2017 - 06/20/2017	YOUR HOUSE	Cancelled

- 5) Course offerings automatically **close after the course date has passed**. You are able to upload a roster when a course offering has closed.



**WARNING:** While viewing the course offering, there is a “[Save](#)” and a “[Cancel](#)” button. **Do not** select any buttons on this page if you are just viewing your offering. If you **cancel** the offering in error, please contact [Education@MyFloridaCFO.com](mailto:Education@MyFloridaCFO.com) for assistance in updating the offering status .

Locate | Apply | Roster | Customize | Maintenance | Help | FAQ | [Logout](#) | [Provider]

In-Box > Offering List > **Offering Detail**  
USER: CE ADMINISTRATORTWO, DFS EDUCATION TEST  
[See Offering Status History](#)

<b>Offering Application</b>	
Offering ID	1034243
Course Name	DFS EDUCATION COURSE 6-12
Course ID Number	89449
Program Type	In-House
Provider ID	368695
Provider Name	DFS EDUCATION TEST
Selected Instructors	CEPL ADMINISTRATORTWO
<b>Date(s)</b> 11/09/2015 to 12/15/2015	
<b>Day of Week</b>	<input checked="" type="checkbox"/> Sun <input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat
<b>Time</b>	08:00 AM to 05:00 PM
<b>Lunch Break</b>	<input type="text" value="12:00 PM"/> to <input type="text" value="01:00 PM"/>
<b>Location</b>	DFS 200 EAST GAINES ST TALLAHASSEE, FLORIDA 32399 County: Leon Region: 1
<b>Change Location</b>	<input type="text" value="(Select One)"/>
<b>Offering Status</b>	
Status	Closed Date 12/16/2015
<a href="#">Save</a> <a href="#">Cancel</a>	

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- 6) Approved course providers must maintain accurate **attendance records** for **5 years** after each course completion containing:
1. The name, date and location of the offering.
  2. Documentation that an ID was checked.
  3. Licensee name and license ID number.
  4. Proof of at least 2 attendance checks for classroom and seminar courses over 4 hours.
  5. 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.*

# Getting Started -

## Submitting a *Roster*

Now that the course offering is approved and has been held, you are ready to submit the attendance roster to the Department. The roster confirms satisfactory completion via the addition to the attendee's transcript.

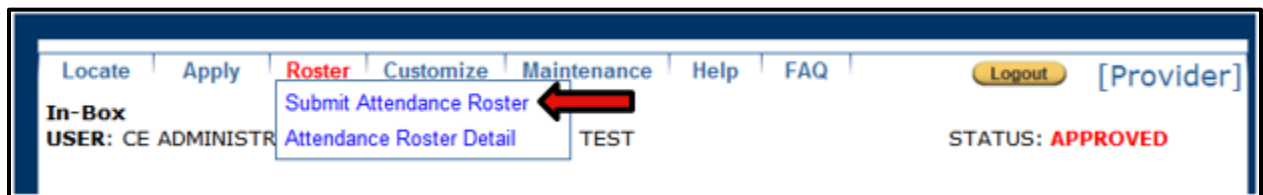
### 1. Roster Reminders:

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

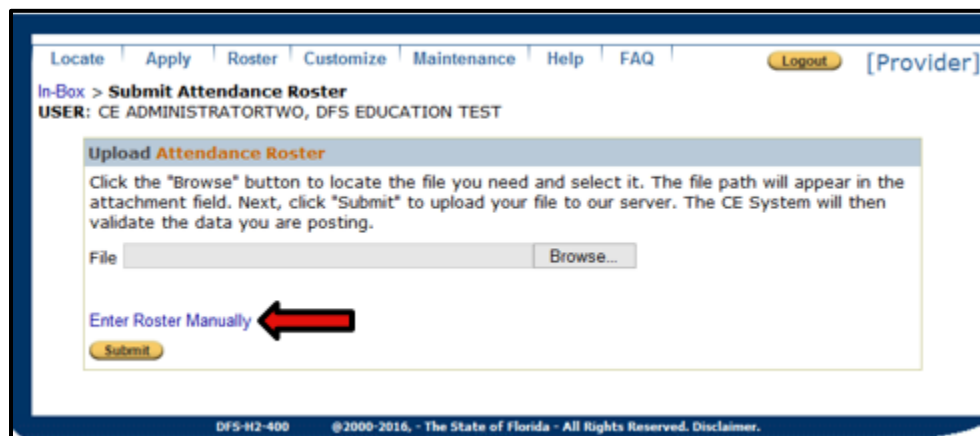
- 1) Rosters must be posted within **21** calendar days of the course completion to allot continuing education credit to licensees who attended the course.
- 2) A completed Certificate of Completion must be issued to each person completing a continuing education course.
  - a) The Certificate of Completion must be issued within 30 calendar days of the date the student completes the course.
- 3) A Department promulgated Certificate is available on the CFO web-site at <https://myfloridacfo.com/Division/Agents/Licensure/Forms/documents/DFS-H2-1668.pdf>.
- 4) The Certificate of Completion must include:
  - i. Name of the student.
  - ii. License number of the student.
  - iii. The provider name.
  - iv. The provider ID number.
  - v. The course ID number
  - vi. The course offering ID number.
  - vii. The name of the course.
  - viii. The name of the instructor (required for classroom and seminar).
  - ix. The instructor ID number (required for classroom and seminar).
  - x. The completion date of the course.
  - xi. The date the certificate was awarded.
  - xii. 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.
  - xiii. The signature of the School Official.
  - xiv. Self-study courses must also include the final examination score.

## 2. How to Submit a Roster:

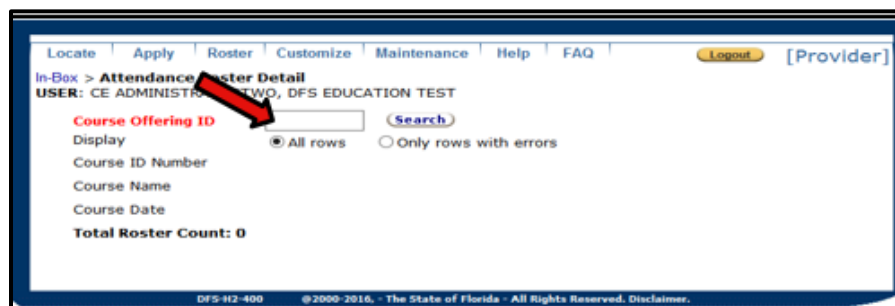
Go to the Navigation Buttons and select “**Roster**”. You will see the drop-down menu below. Select “**Submit Attendance Roster**”.



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



2) Enter the course offering ID number and select “**Search**”.



- 3) A blank screen will appear. You may enter up to 10 attendees per screen.

Locate Apply Roster Customize Maintenance Help FAQ Logout [Provider]

In-Box > Attendance Roster Detail  
 USER: CE ADMINISTRATOR TWO, DFS EDUCATION TEST

Course Offering ID: 1038515 (Search)  
 Display: ☒ All rows ☐ Only rows with errors  
 Course ID Number: 93770  
 Course Name: FSDFAFSD  
 Course Date: 01/01/2016 to 12/31/2016  
 Total Roster Count: 0

Attendance Roster							Approved Hours: 60 hours
#	Process Status	SSN/License #	First Name	Last Name	Pass/Fail	Grade	Date Earned (mm/dd/yyyy)
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
7	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
8	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
9	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
10	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Legend: E Error, N Not Posted (Pending), S Successfully Posted, D To be deleted, U Unposted

[Add Attendees] Submit

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- 4) If you have more than 10 attendees at the end of each screen, select “Add Attendees” and a new screen will be brought up. Once all attendees have been entered. Select “Submit”.

Locate Apply Roster Customize Maintenance Help FAQ Logout [Provider]

In-Box > Attendance Roster Detail  
 USER: CE ADMINISTRATOR TWO, DFS EDUCATION TEST

Course Offering ID: 1038515 (Search)  
 Display: ☒ All rows ☐ Only rows with errors  
 Course ID Number: 93770  
 Course Name: FSDFAFSD  
 Course Date: 01/01/2016 to 12/31/2016  
 Total Roster Count: 0

Attendance Roster							Approved Hours: 60 hours
#	Process Status	SSN/License #	First Name	Last Name	Pass/Fail	Grade	Date Earned (mm/dd/yyyy)
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
7	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
8	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
9	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
10	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

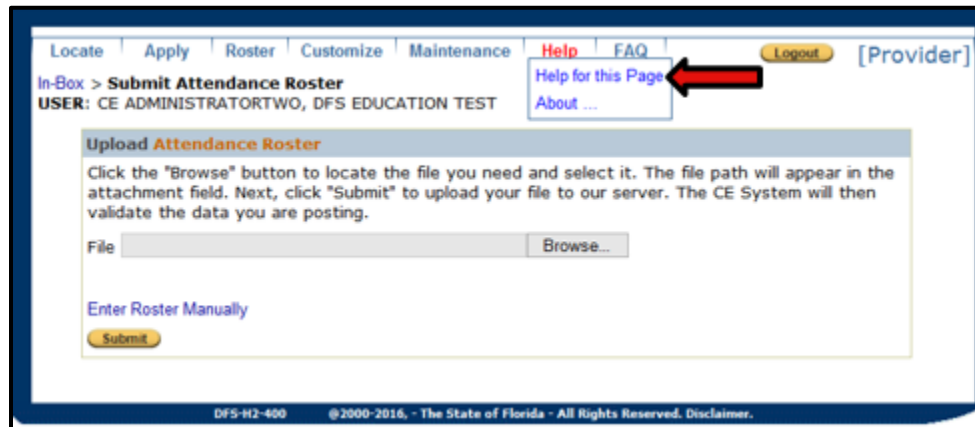
Legend: E Error, N Not Posted (Pending), S Successfully Posted, D To be deleted, U Unposted

[Add Attendees] Submit

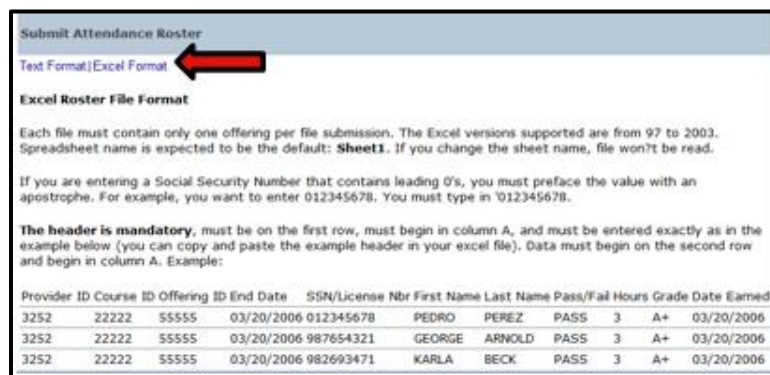
DFS-H2-400 ©2009-2016, The State of Florida - All Rights Reserved. Disclaimer.



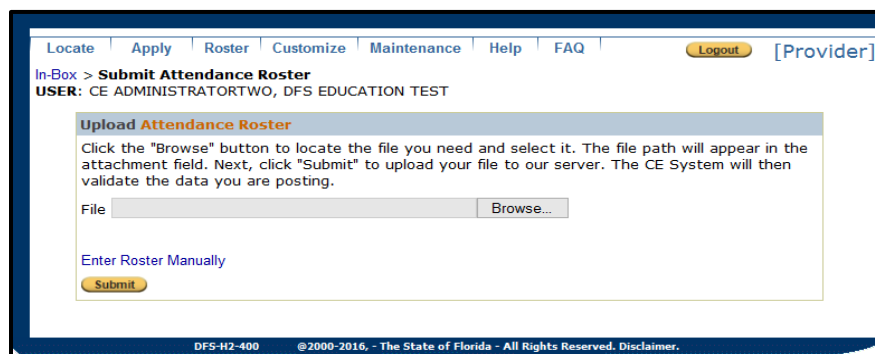
- 5) To enter the Roster by an Excel Spreadsheet, select the **Help** button at the top of this page (the Help button is located in the Navigation Buttons). Select **"Help for this Page"**.



- 6) Select **"Excel Format"**.



- 7) Follow the directions as given for inputting Excel files; then return to the previous screen.
- 8) Once your Excel file is ready to submit, select **"Submit Attendance Roster"** and select the **"Browse"** button. Follow the directions to upload your file to our server.



# Getting Started -

## *Instructors*

### 1. Instructor Reminders:

- 1) **Classroom:** Must be taught by a Registered instructor.
- 2) **Seminar:** Allow guest lecturers; however, they must have at least one (1) Registered Instructor present in the course authority being taught.

### 2. Instructor Qualifications:

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

- 1) Have at least 10 years working experience in the subject matter in the last 20 years.
- 2) Have at least 200 hours instructing in the subject matter in the last 4 years.
- 3) Possess a chartered property and casualty underwriter (CPCU) or chartered life underwriter (CLU) designation.
- 4) Have a Risk Management Insurance degree.
- 5) 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:

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

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

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

**OR**

Instructors must meet two (2) of the following qualifications:

- 1) At years At least 10 years working experience in the subject matter in the last 20.
- 2) At least forty (40) hours instructional experience in the last four (4) years.
- 3) Bachelors degree or higher in the subject matter.
- 4) Professional designation recognized by the insurance industry in the subject matter.

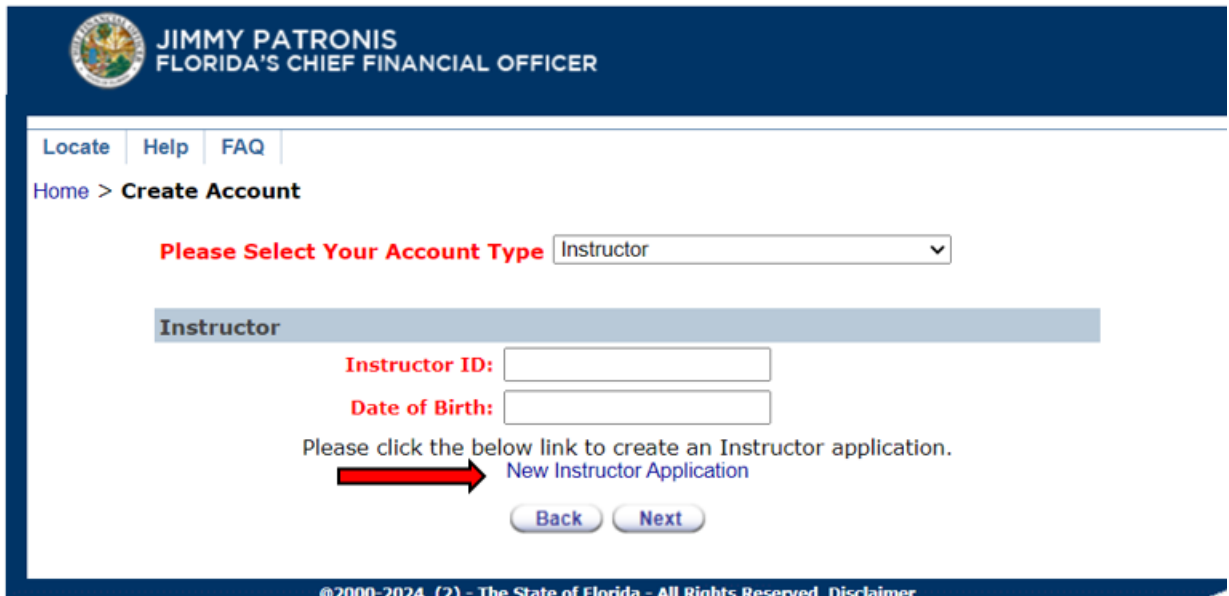
**Bail bond** supervising instructors/school officials (continuing education and pre-licensing) must meet the qualifications as set forth in Section 648.386(4), F.S., subject to the limitations imposed in Rule 69B-227.310, F.A.C.

*You can review Registered 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.*

### 3. Instructor Applications:

How to Submit an Instructor Application:

- Go to the [MyProfile](#) login page.
- Select Create Account.
- Select Instructor on the drop-down menu.
- Then click the New Instructor Application
- Follow screen prompts to complete the application.
- Submit the application.



JIMMY PATRONIS  
FLORIDA'S CHIEF FINANCIAL OFFICER

Locate | Help | FAQ

Home > Create Account


Please Select Your Account Type

Instructor

Instructor ID:

Date of Birth:

Please click the below link to create an Instructor application.

 [New Instructor Application](#)

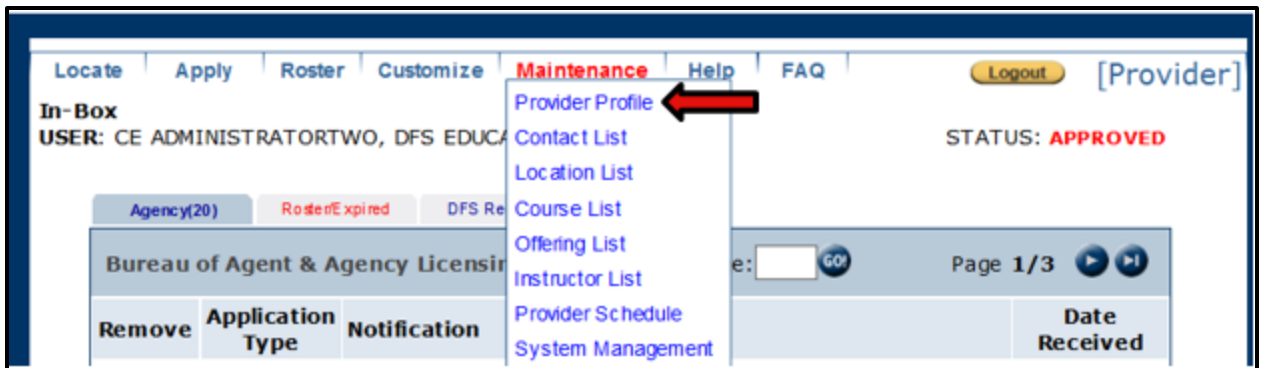
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## Maintaining MyProfile - Provider *Profile*

The Provider's profile is maintained online. The information you provide is used by the Department to customize your personal contact method(s).

### 1. How to View and Update the Provider's Profile:

Go to the Navigation Buttons and select Maintenance. You will see the drop-down menu below. Select "**Provider Profile**".



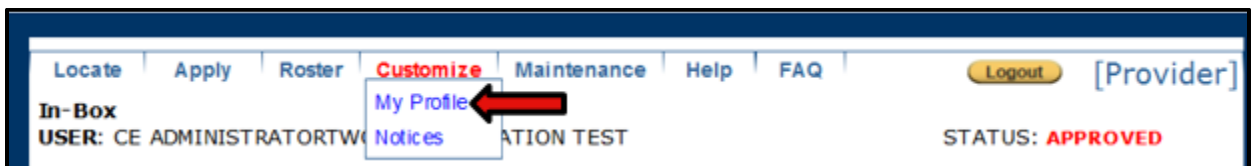
1) You will be able to update the Provider's contact information, such as:

- a) Provider DBA
- b) Business Address
- c) Mailing Address
- d) Email
- e) Phone Number

2. To update the Provider name, you will need to send an email to:  
[Education@MyFloridaCFO.com](mailto:Education@MyFloridaCFO.com).

3. How to View and Update the User's Profile (this function is for the person logged in):

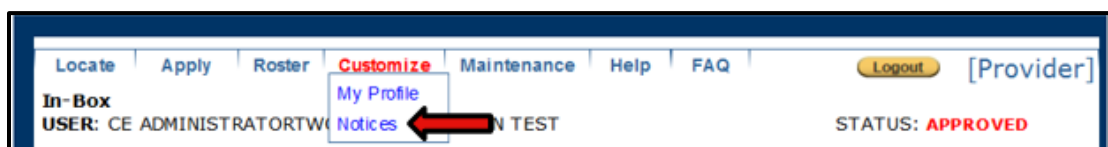
Go to the Navigation Buttons and select "**Customize**". You will see the drop-down menu below. Select "**My Profile**".



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 (this function is for the person logged in):

1) Go to the Navigation Buttons and select '**Customize**'. You will see the drop-down menu below.



2) Choose your preferred contact method and confirm your email address:

- a) In-Box or Email
- b) HTML or Plain Text

[Locate](#) | [Apply](#) | [Roster](#) | [Customize](#) | [Maintenance](#) | [Help](#) | [FAQ](#) | [Logout](#) [Provider]

In-Box > **Customize**

USER: CE ADMINISTRATORTWO, DFS EDUCATION TEST

**You can customize the way the information is showed to you. Make your selection!**

Preferred Contact Method

- ☒ I want to be contacted via my In-Box.
- ☒ I want to be contacted by e-mail. The format I prefer is
  - ☐ HTML ☒ Plain text

**E-mail**

Alternate E-mail

[Save](#)

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