CE Provider Portal Manual

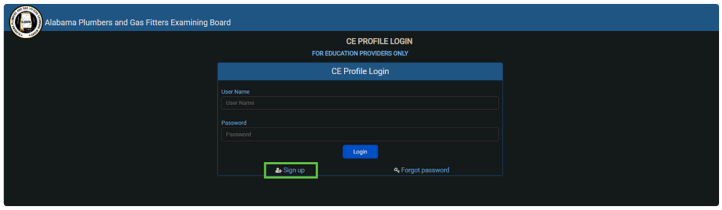
By Joshua Calahan 3 min 2

Overview:

This manual will assist the user in using the CE Provider Portal.

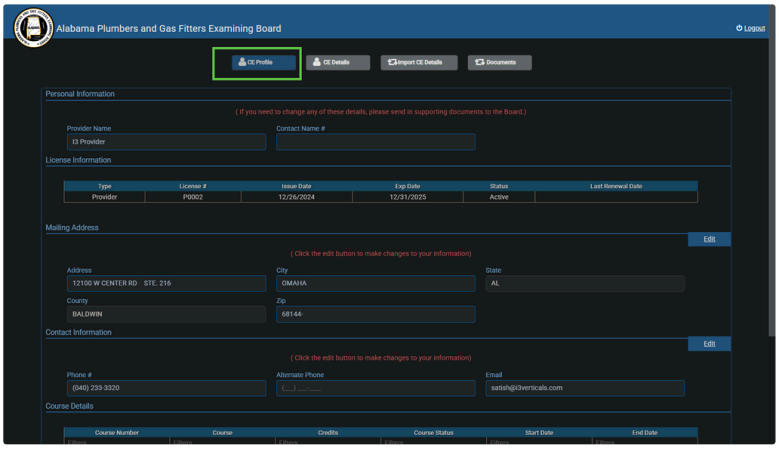
Logging In:

A provider will first need to sign up with an account before being able to access the portal. After clicking the **“Sign Up”** button, they will be prompted to put in their **License Number**. Afterwards they will be able to create a username, password, and enter an email.



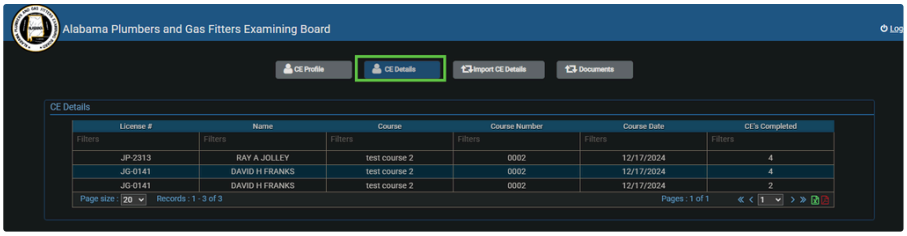
CE Profile Tab:

The “**CE Profile”** tab shows basic personal information about the provider (Provider name, license information, contact information.) At the bottom you will see course details about courses associated with the provider.



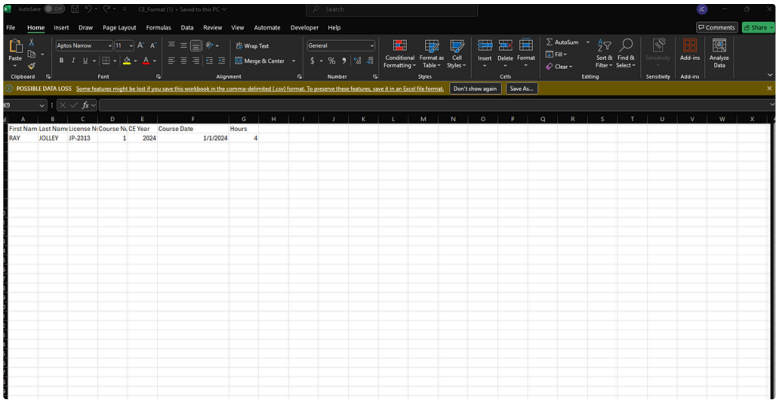
CE Details Tab:

The **“CE Details”** tab shows a list of individuals who have taken courses associated with the provider. Individuals added through the **“CE Import”** will appear here also.

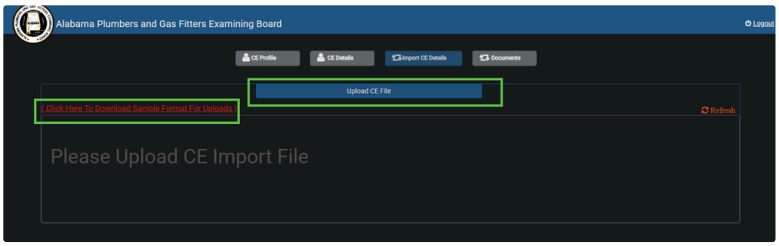


Import CE Details Tab:

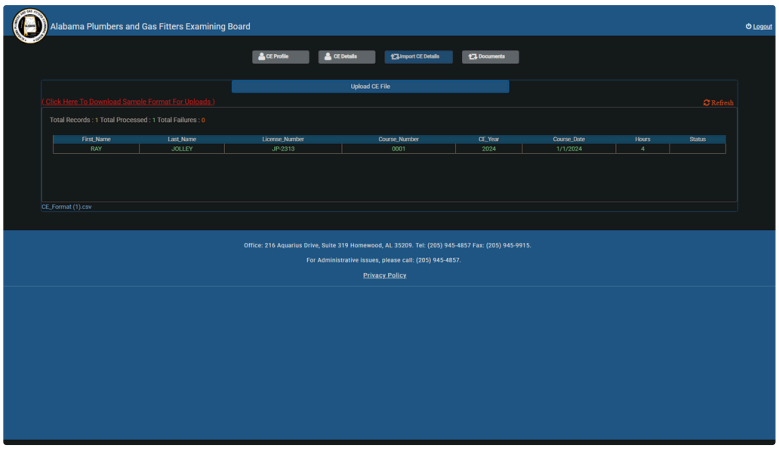
The **“Import CE Details”** tab is used to import CE information. By clicking the “**Click Here to Download Sample Format For Uploads”** link in red, you will download an excel sheet which you can use to customize the details for the CE import. You are able to Edit the First and Last name, License Number, Course Number, CE Year, Course Date, and CE hours. You can add multiple individuals at a time. Make sure to save it an accessible location after changes.



After filling out the document, you can select the **“Upload CE File”** and select the Excel File. A message will populate displaying how many records processed, failed, and the total reords. Proccessed records will appear on a user’s Office Profile under the **“Courses”** tab. If the record failed it will give a reason in the Status column. (Note that uploading a course not associated with the provider will result in a failed import.)



Example of Successful Import:



Example of a Failed Import: