DIFS Education Roster Entry System (DERES) End-User Manual

Welcome to the Continuing Education (CE) and Pre-licensing Education (PE) Roster Application. The following manual will provide instructions on:

- Establishing your Provider access to the application;
- How to upload or manually enter your roster information;
- Processing payments for your education credits; and
- Printing your roster listing and certificates of completion.
- Accessing Provider history of submitted rosters

Overview

Things might look a little different than before. We have given DERES a facelift, and the application is surrounded by a more consistent look. The main header, the footer, and navigation are mobile friendly, and will fit many different screen resolutions and sizes.
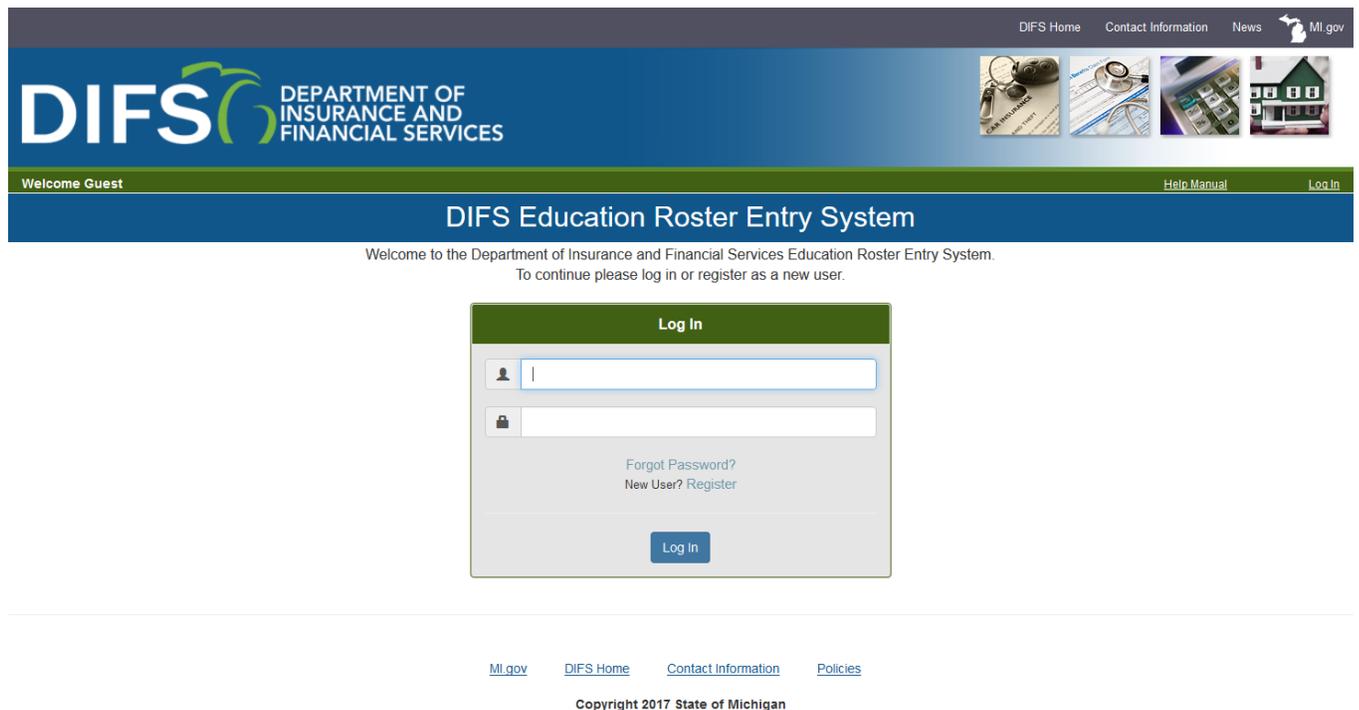

Figure 1: New look and feel

Login

To access the DIFS Education Roster Entry System, navigate to https://difs.state.mi.us/ce_roster. The following screen will be displayed, requesting the user to log in.

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DIFS Education Roster Entry System

Welcome to the Department of Insurance and Financial Services Education Roster Entry System. To continue please log in or register as a new user.
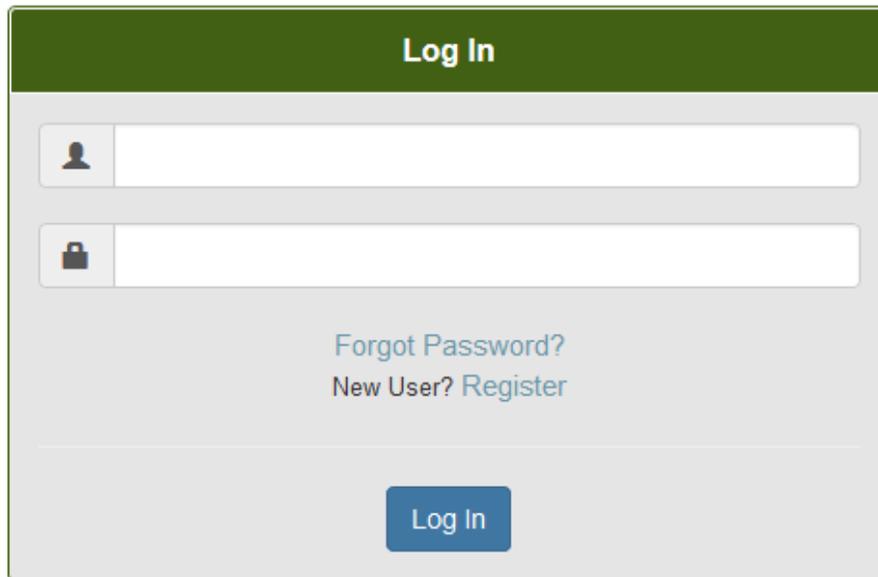
Log In

Forgot Password?
New User? Register

Log In

Figure 2: DERES Login

Existing Users
- Provide your user name and password and select **Log In** to access your account.
- If you forgot your password, you can select the **Forgot Password** hyperlink.

New Users
- Click the **Register** hyperlink located above the Log In button.

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Registration

Figure 3: Registration screen

The registration screen is divided into two areas, **User Information**, and **Security Questions**. Mandatory information is marked with an asterisk (*). The user information includes the following:

- Company Name
- First Name
- Last Name
- Email Address
- Email Address again to confirm (this will be your User Name to log into the application)
- Phone Number

The **Security Questions** section includes six (6) questions. To register successfully, complete at least four (4) out of the six questions. After supplying the required information, select **Save** to register.

Figure 4: Successful Registration

An email will be sent from webnoreply@michigan.gov confirming your registration and providing you a temporary password for your initial access of the application.

> *If you do not receive your email containing the temporary password, be sure to check your Junk or Spam mail folder in case your email system placed it there. Make sure to mark webnoreply@michigan.gov as a trusted email contact.*

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Sample Confirmation Email:

From: webnoreply@michigan.gov [mailto:webnoreply@michigan.gov]
Sent: Saturday, December 31, 2011 11:00 AM
To: sample@sample.com
Subject: Welcome to the Continuing Education Online Roster system

Hi John Doe,

Welcome to the Office of Financial and Insurance Regulation Continuing Education Roster Entry System.

Company you represent: Sample
Your User ID is: sample@sample.com
Your Temporary Password is: Nn0#Qf3$

After using your temporary password to sign in, you will immediately be asked to enter and confirm a new password for your account.

Thank you

To continue using the system, click on the **Log In** link on the navigation bar. This will redirect the user back to

the **Log In** screen.
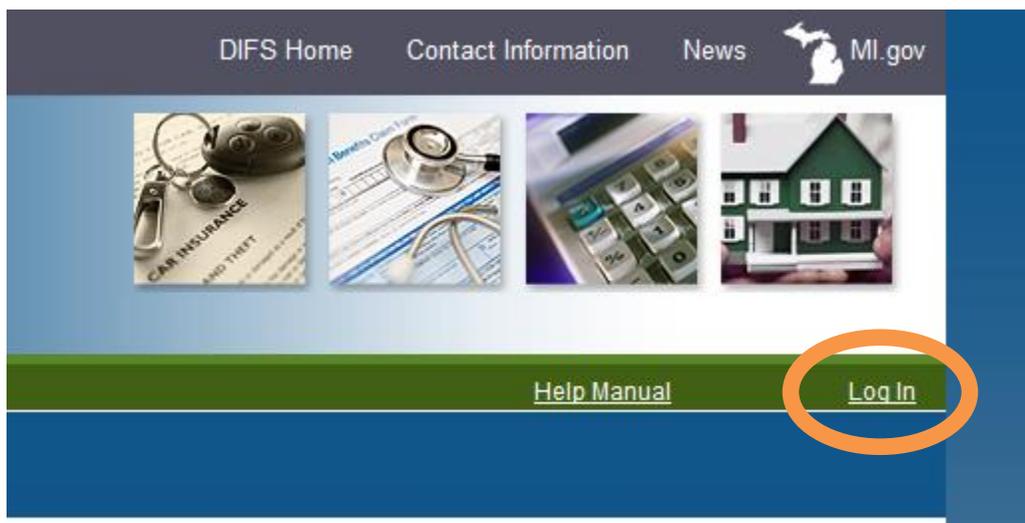
Forgot Password

If a user has forgotten their password, the link on the main pain will redirect them to this page.

DIFS Education Roster Entry System

After submitting your email address in the box below, a new temporary password will be sent to you. Use the temporary password to log in once, at which time you will have to change your password to one of your own choice. Once those steps are completed, you will need to log in again using your new password.

Forgot Password

User Name (Email Address)

Provide your email address

Submit   Cancel
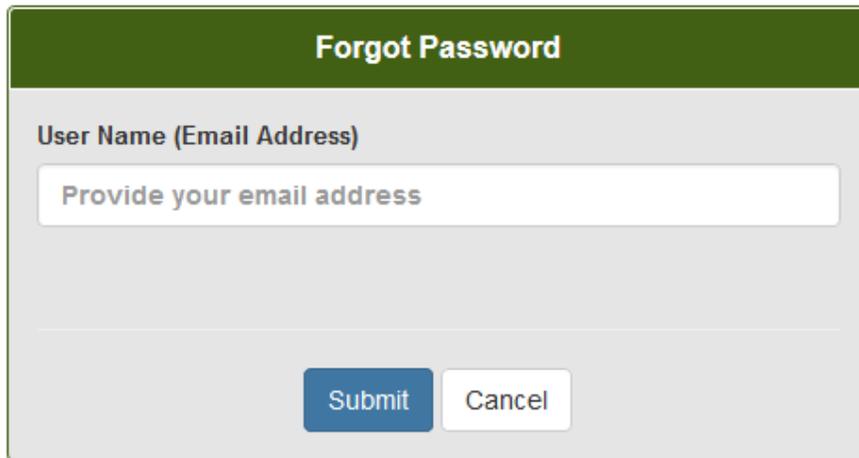
Figure 5: Forgot Password Screen

Change Password

As a new user of the CE Roster Entry System, you will be prompted to change your password once you have initially logged into the system. Click on the **Change Password** hyperlink to create your permanent password to replace the system assigned temporary password.

Hide

When choosing a new password it must meet the following complexity requirements:

- The password must contain at least 8 characters.
- The password must contain no more than 20 characters.
- Must contain 1 or more upper case characters, 1 or more lower case characters and either a numeric value or a special character such as: ! $ # % _
- The password cannot be based on your username (email)
- The new password cannot be equal to a recently used one
- Examples: DJmXto!2, Mri4huA$, T#_sMxc1 etc.

Change Your Password

Why am I being asked to create a new password?

* Current Password

Provide your current password

* New Password

Provide a new password keeping the above requiremens in mind

* Retype New Password

Retype the new password

Save   Cancel

Figure 6: Change Password Screen

Read the password complexity requirements of the State of Michigan. Requirements might have changed since creating this manual. Enter your temporary password in the **Current Password** field. Enter a new password that adheres to the requirements in the **New Password** field. Reenter the same password in the **Retype New Password** field.

Click on the **Save** button and you will receive a message indicating that you've successfully changed your password.

The user is automatically redirected to the login page. If an error occurs, an error message will be displayed, and the user will not be redirected to the login page.

Figure 7: Successful Password Change

New Provider

Upon successful login, the application will prompt you for the Provider Verification Code that was previously issued by DIFS for your individual Provider Number. Enter the Provider Verification Code and click the Validate Provider button.

Figure 8: Provider Validation Screen

Upon validation, you will be redirected to the Home page. If an error occurs, a message will appear on the screen and allow you to make any corrections.
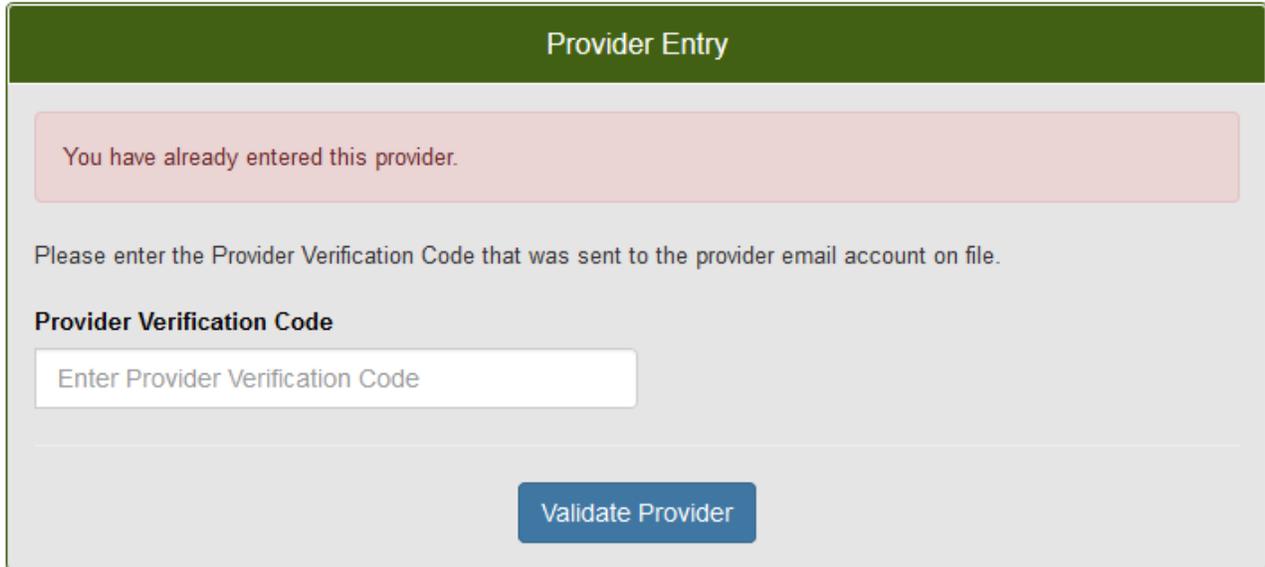
Figure 9: Add Provider Failed Validation

If you have been sent more than one Provider Verification Code, hover over the Providers hyperlink on the gray menu bar and click Add Provider.
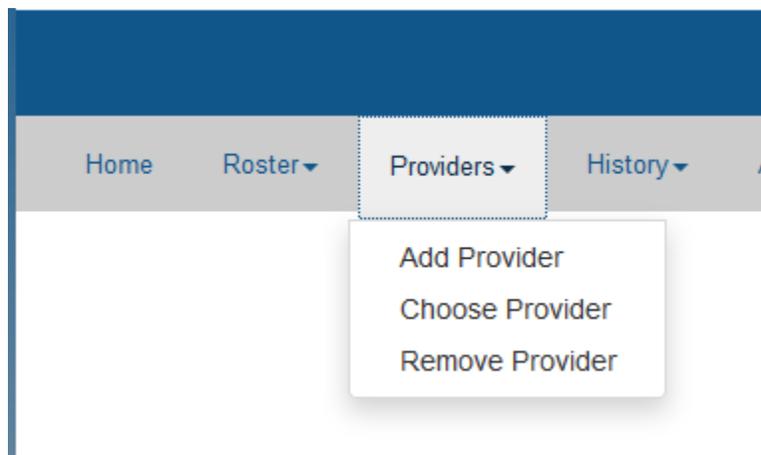
Figure 10: Add Provider from Menu

Click on Add Provider, enter another Provider Verification Code and click on the Validate Provider button.

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If you have entered more than one Provider Verification Code, the default Provider is indicated in Red at the top of the Roster Entry Screen. If you need to select another Provider to enter a roster, hover over or click on the Providers link on the gray menu bar and click on Choose Provider to select the Provider you need to roster for. If you no longer need to enter a roster for an assigned Provider, you can click on Remove Provider to remove them from your list of available Providers.

Choose a Provider
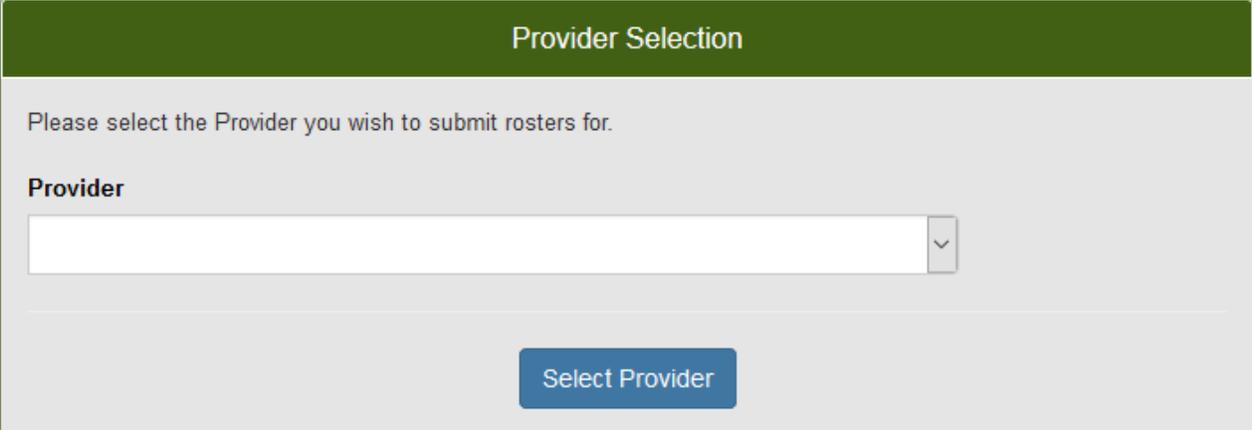
Provider Selection

Please select the Provider you wish to submit rosters for.

Provider

[dropdown]

Select Provider

Figure 11: Choose Provider Screen

CE Roster Attendee Entry: Upload File

To upload a CE Roster Attendee file, the file must follow the tab delimited format or a comma-separated values file noted on the CE Roster application's Roster Entry screen.

On the Roster Entry screen, click on the Browse button to select file that you wish to upload. A dialogue box opens showing the files that have been saved on the computer. Select the file and click the Open button. The path and filename will be populated in the box next to the Browse Button. Click the Upload File button to upload the file to the CE Roster Entry System. The screen will populate with the information contained in the file (you may have to scroll down to see all the data). Once uploaded, the data can be Edited or Deleted by using the control icons on the columns to the far right of the entry.

0007 MICHIGAN ASSOCIATION OF INSURANCE AGENTS
(MAIA)
Continuing Education Rostering

👤 Roster by Individual Entry

📄 Roster by File Upload

Roster Attendees by uploading a file. Best for large roster tasks.

The Education Roster Entry System can accept and process text files in a tab-delimited format as well as CSV files generated from Microsoft Excel.

Each row within the text file must include course attendee data organized in columns in the following format:

Provider ID	Course ID	Completion Date (MM-DD-YYYY)	Attendee License # (System ID)	Attendee Last Name	Attendee First Name

Download Sample Text File   Download Sample CSV File

Browse...   No file selected.   Upload File

Figure 12: CE Roster - File Upload Panel

Data Entry Results

Line #	Prov ID	Course ID	Course Name	Course Credits	Comp Date	System ID	First Name	Last Name	*	Edit	Delete
1	0931	58161			02/01/2017	0537161	LHAUREN	WALKER	• Invalid Provider ID • Course not valid for this Provider 0007	✏️⚠️	✗
2	0931	58161			01/09/2017	0274701	JOY	VANNESTE	• Invalid Provider ID • Course not valid for this Provider 0007	✏️⚠️	✗

Clear

Figure 13: Data Entry Results displayed with Errors

Data Entry Results

Line #	Prov ID	Course ID	Course Name	Course Credits	Comp Date	System ID	First Name	Last Name	*	Edit	Delete
1	0007	54020	WATERCRAFT & UMBRELLA - 2010	3	11/23/2016	0590274	MELANIE	BURK		✏️⚠️	✗

Summary

	Course Totals		
	Courses:	1	
	Credit Hours:	3	
	Total Cost:		$0.00

[Submit Roster] [Clear]

Figure 14: Date Entry Results without Errors

A Course Total appears at the bottom of the screen indicating the number of courses, total number of credit hours and the total cost for the uploaded data.

CE Roster Attendee Entry: Manual Entry

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(MAIA)**
Continuing Education Rostering

👤 Roster by Individual Entry

Roster Attendees by individually entering in each attendee. Great for rostering only a few attendees.

To search for attendee information visit
http://difs.state.mi.us/fis/ind_srch/ins_agnt/

* **Course ID**

54020 (WATERCRAFT & UMBRELLA - 2010)

* **Completion Date**

Enter the Date of Course Co

* **Individual System ID**

Enter the Individual's System

* **Last Name**

Enter the Individual's First Name

* **First Name**

Enter the Individual's Last Name

[Insert]

📄 Roster by File Upload

Figure 15: Data Entry - Single Entry

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On the Roster Entry screen, click on the Course ID drop down arrow and select the course that you wish to add attendees to. *(Courses will be listed alphabetically for the selected Provider Number.)* Once selected, enter the following information in the Individual Entry section:

- Course ID

- Course Completion Date

- Individual System ID (*license ID assigned by OFIR*) which can be searched using the link identified above the Individual Entry fields

- Attendee's First Name

- Attendee's Last Name

Once entered, click on the Insert button to insert the attendee information into the roster.

Data Entry Results

Line #	Prov ID	Course ID	Course Name	Course Credits	Comp Date	System ID	First Name	Last Name	*	Edit	Delete
1	0931	58161			02/01/2017	0537161	LHAUREN	WALKER	• Invalid Provider ID • Course not valid for this Provider 0007	🖉 ⚠	✗
2	0931	58161			01/09/2017	0274701	JOY	VANNESTE	• Invalid Provider ID • Course not valid for this Provider 0007	🖉 ⚠	✗

Clear

Figure 16: Data Entry Results displayed with Errors

Data Entry Results

Line #	Prov ID	Course ID	Course Name	Course Credits	Comp Date	System ID	First Name	Last Name	*	Edit	Delete
1	0007	54020	WATERCRAFT & UMBRELLA - 2010	3	11/23/2016	0590274	MELANIE	BURK		🖉 ⚠	✗

Summary

Course Totals		
Courses:	1	
Credit Hours:	3	
Total Cost:		$0.00

Submit Roster   Clear

Figure 17: Date Entry Results without Errors

The page will populate with the information that has been entered (you may have to scroll down to see all the data). Once entered, the data can be Edited or Deleted by using the control icons on the columns to the far right of the entry.

A Course Total appears at the bottom of the screen indicating the number of courses, total number of credit hours and the total cost for the entered data.

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When all attendee information has been entered, click on the Submit Roster button to submit the information to DIFS. A total summary of the attendees entered will be displayed indicating the number of courses, credits and the total cost.

Summary			
Course Totals			
	Courses:	1	
	Credit Hours:	3	
	Total Cost:		$0.00

Submit Roster   Clear

Figure 18: Fee Summary

Review Batch

The total roster fee is $0.00. To complete the roster process, please select Pay Now at the bottom of this page. To view or edit the roster, select Edit

Course Review Information				
Course ID	Course Name	Course Credits	Attendees	Cost
58164	ANNUITIES - WHAT YOU NEED TO KNOW	4	1	4.00

Roster Total Information	
Courses:	1
Credit Hours:	4
Total Cost:	$0.00

Pay Now   Edit   Cancel

Figure 19: Review

Once verified, click on the Pay Now button, which will navigate to the CEPAS Credit Card Processing Payment Module to provide payment for the course credits.

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CEPAS Screen

Figure 20: Initiate Payments Screen

Click on the Next button to proceed with payment processing. *(Payments may be made with valid Visa, MasterCard or Discover credit cards only.)* The required fields are indicated below.

Figure 21: Payment Details Screen

Figure 22: Payment Confirmation

Enter the following into the Billing Address section:
- First Name
- Last Name
- Street – Line 1
- Street – Line 2, if applicable
- City
- State
- Zip
- County (United States, defaults)
- Phone Number
- Email Address

Confirm the payment amount in the Payment Details section.

Enter the following information in the Payment Method section:
- Name as it appears on the credit card
- Card Number
- Expiration Date – Month
- Expiration Date – Year

Upon entry, click on the Next button and confirm the details of the transaction on the Payment Review page.

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If satisfied with the information entered and verified, click on the Pay Now button to submit the payment.

Upon successful payment, the payment results page will display providing you the option to Generate the Roster Summary Report and or Generate Roster Completion Certificates.

Batch Results

Your roster(s) have been successfully submitted.

Payment Results	
Payment Result:	Successful
Confirmation Number:	noPay
Payment Amount:	$0.00
Submission Date:	4/27/2017
Card Type:	NoCard

Your transaction has been approved and a charge of $0.00 has been applied to your credit card. Your confirmation # is noPay. Please refer to this number in all correspondence regarding this transaction.

This is your receipt. Please print this page for your records.

Generate Roster Summary Report

Generate Roster Completion Certificates

Return Home

Figure 23: Confirmation Screen

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Generate the Roster Summary Report

On the payment results page, click the Generate Roster Summary Report hyperlink to generate the report.
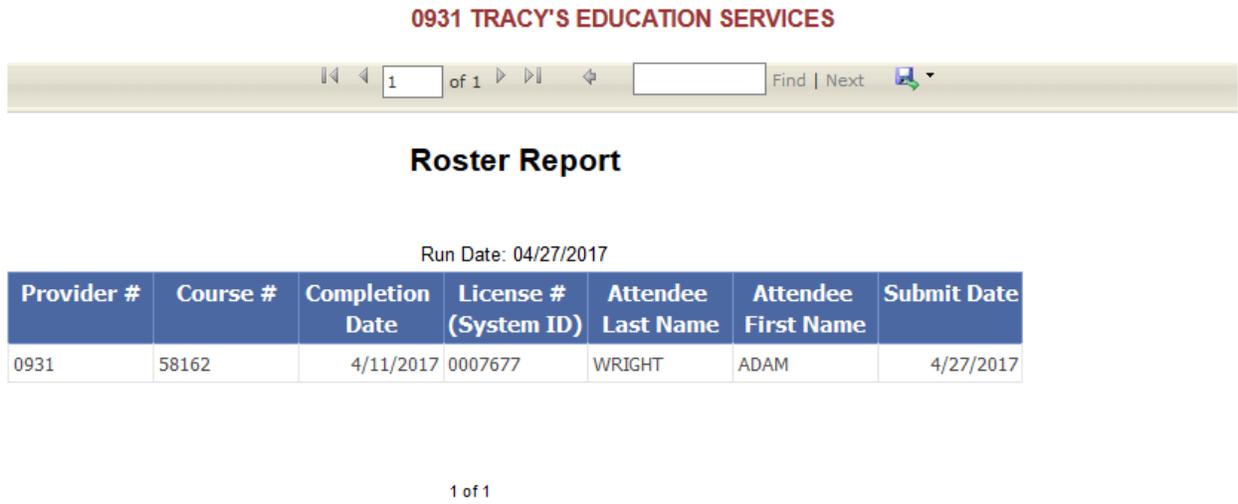

Figure 24: Roster Summary

A new window will open displaying the Summary Roster Report. This report can be saved in various formats including Word, PDF or Excel. Select the format by clicking on the down arrow next to the Save icon on the report navigation toolbar. The report will be exported to that format where you can print or save the report.

Generate Roster Completion Certificates

On the payment results page, click the Generate Roster Completion Certificates hyperlink to print the certificates.

| ◄◄ ◄ 1 of 1 ► ►| ⟵ [ ] Find | Next 💾 ▼ |

STATE OF MICHIGAN
Department of Insurance and Financial Services

CE Course Completion Certificate

This certifies that ADAM WRIGHT
has successfully completed the course requirements for:
LIFE PE BASICS

System ID: 0007677
Course Number: 58162
Number of Credits: 20
Date of Course Completion: 4/11/2017
Type: Life

Provider Name: TRACY'S EDUCATION SERVICES
Provider Number: 0931
Address: 611 W OTTAWA ST
LANSING, MI 48933 US
Phone Number: (517) 373-7228

Authorized Provider Official:
Date:

Authorized Training Representative

Figure 25: Course Completion Certificate

A new window will open displaying the Roster Completion Certificates. These Certificates can be saved in various formats including Word, PDF or Excel. Select the format by clicking on the down arrow next to the Save icon on the report navigation toolbar. The certificates will be exported to that format where you can print or save the certificates.

Please note that some features may not be 100% compatible with all internet browsers.

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Viewing Provider History

On any screen in the system users can hover over the History link in the gray menu bar and select

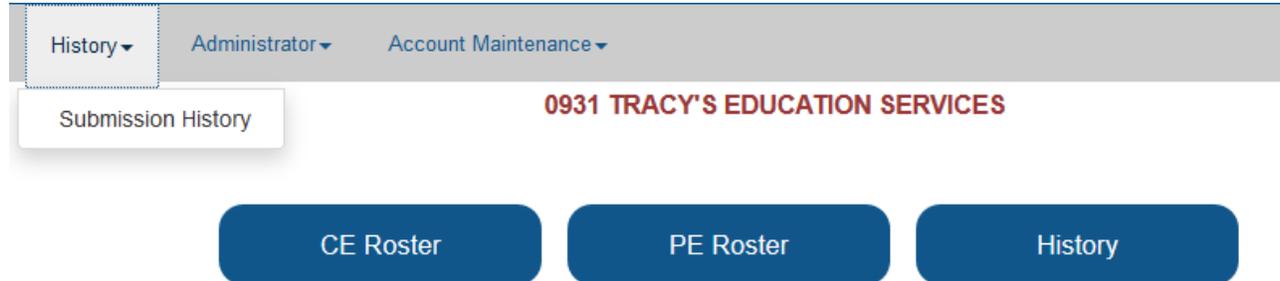Submission History. This will display all roster submissions uploaded by your active/selected provider.

Figure 26: Submission History

At the View Submission History page, you can select PE submissions, CE submissions, or both (leave both

boxes <u>un</u>checked for both) to narrow down your choice.

Figure 27: Select Provider

After selecting your submission type and your provider, a list of submissions will be generated on the

current page.

Batch #	Confirmation #	Batch Cost	Batch Courses	Batch Credits	Submission Date	Submitter	Type	View
00014433	noPay		0	2	5	3/20/2017 12:00:00 AM	lord-bishopt@michigan.gov	CE	View Roster
00014434	noPay		0	2	5	3/20/2017 12:00:00 AM	lord-bishopt@michigan.gov	CE	View Roster
00014446	noPay		0	1	3	3/23/2017 12:00:00 AM	lord-bishopt@michigan.gov	CE	View Roster

Figure 28: Select CE and PE Submissions for Provider

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From here you can select any of the submissions by clicking on the View Roster link on the right-hand side. This will display batch details pertaining to the selected batch.

Figure 29: List with batch details list underneath

From here the user can select links to generate Roster Summary Report, Completion Certificates or individual Completion Certificates.

This Submission History section will display all history for the selected provider regardless of the user that uploaded the roster information.

When finished printing the report or the certificates, click on the Return Home button to start CE Roster entry again or click the Logout hyperlink to end your session.