

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.

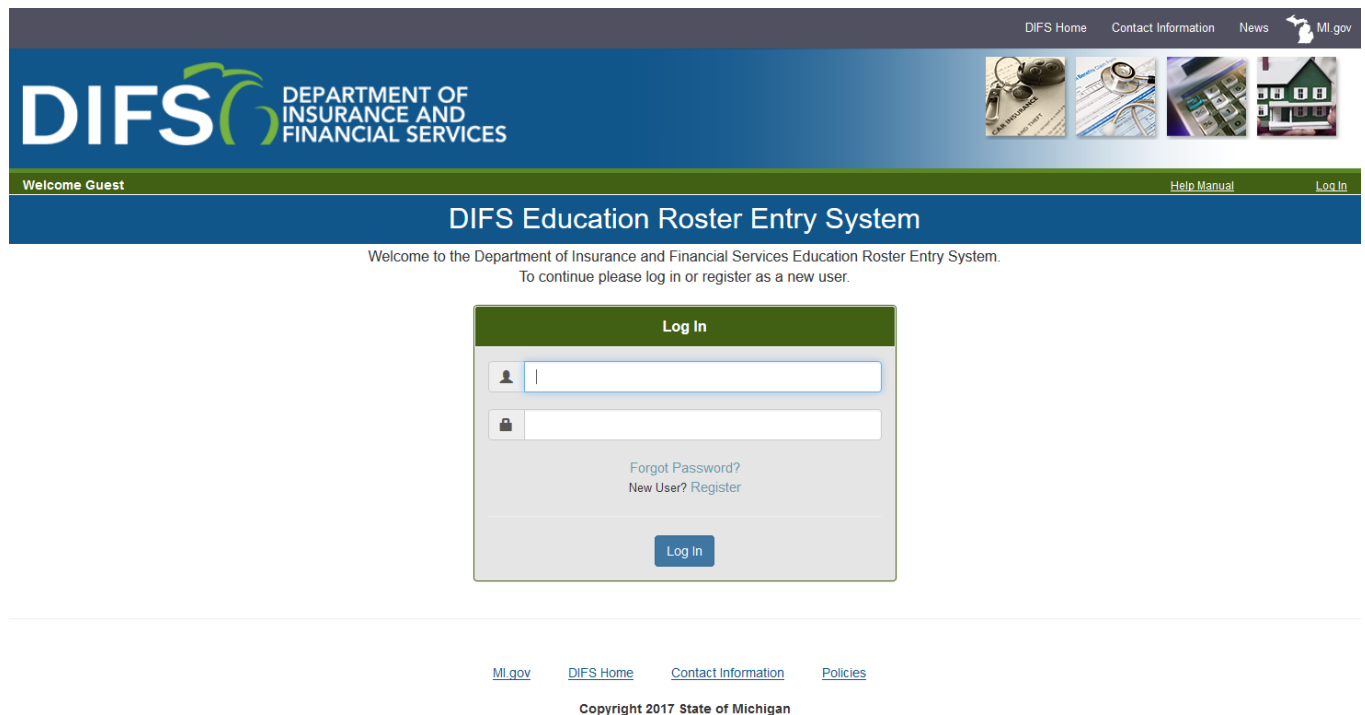


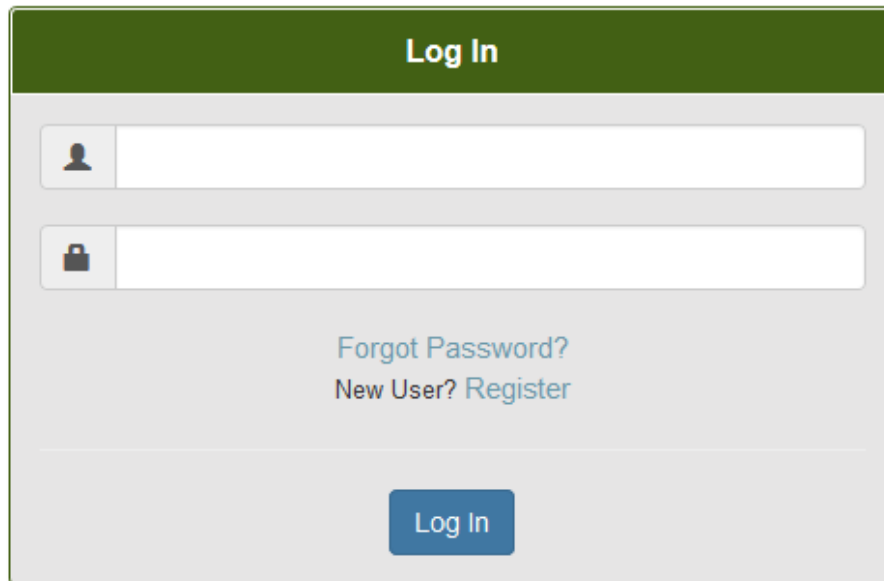
Figure 1: New look and feel

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.

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.



The screenshot shows a login interface with a green header containing the text "Log In". Below the header, there are two input fields. The first field has a person icon on the left, and the second field has a lock icon on the left. Below the input fields, there are two links: "Forgot Password?" and "New User? Register". At the bottom of the form is a blue button with the text "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

The registration screen is titled "DIFS Education Roster Entry System" and "Registration". It is divided into two main sections: "User Information" and "Security Questions (answer at least 4)".

User Information

- * First Name: Enter a First Name
- * Last Name: Enter a Last Name
- * Email: Enter an Email Address
- * Confirm Email: Confirm the Email Address
- Company Name: Enter a Company Name
- Phone Number: 333, 123, 5678
- Ext.: x361 Ext. 7

Security Questions (answer at least 4)

- Name of your favorite childhood friend? Provide an answer
- What school did you attend for sixth grade? Provide an answer
- What is your paternal grandmother's last name? Provide an answer
- What city were you born in? Provide an answer
- What is your father's middle name? Provide an answer
- What is your mother's maiden name? Provide an answer

Buttons: Save, Cancel

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.

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DIFS Education Roster Entry System

You Have Successfully Registered! You will get an email with Login Information

Registration

User Information

<p>* First Name</p> <input style="width: 95%; padding: 5px;" type="text" value="Enter a First Name"/>	<p>* Last Name</p> <input style="width: 95%; padding: 5px;" type="text" value="Enter a Last Name"/>								
<p>* Email</p> <input style="width: 95%; padding: 5px;" type="text" value="Enter an Email Address"/>	<p>* Confirm Email</p> <input style="width: 95%; padding: 5px;" type="text" value="Confirm the Email Address"/>								
<p>Company Name</p> <input style="width: 95%; padding: 5px;" type="text" value="Enter a Company Name"/>	<p>Phone Number</p> <table style="width: 100%; border-collapse: collapse;"><tr><td style="width: 25%; border: 1px solid #ccc; padding: 2px 5px;">333</td><td style="width: 25%; border: 1px solid #ccc; padding: 2px 5px;">123</td><td style="width: 25%; border: 1px solid #ccc; padding: 2px 5px;">5678</td><td style="width: 25%; border: 1px solid #ccc; padding: 2px 5px;">Ext.</td></tr><tr><td colspan="3"></td><td style="border: 1px solid #ccc; padding: 2px 5px;">x361 Ext. 7</td></tr></table>	333	123	5678	Ext.				x361 Ext. 7
333	123	5678	Ext.						
			x361 Ext. 7						

Security Questions (answer at least 4)

<p>Name of your favorite childhood friend?</p> <input style="width: 95%; padding: 5px;" type="text" value="Provide an answer"/>	<p>What school did you attend for sixth grade?</p> <input style="width: 95%; padding: 5px;" type="text" value="Provide an answer"/>
<p>What is your paternal grandmother's last name?</p> <input style="width: 95%; padding: 5px;" type="text" value="Provide an answer"/>	<p>What city were you born in?</p> <input style="width: 95%; padding: 5px;" type="text" value="Provide an answer"/>
<p>What is your father's middle name?</p> <input style="width: 95%; padding: 5px;" type="text" value="Provide an answer"/>	<p>What is your mother's maiden name?</p> <input style="width: 95%; padding: 5px;" type="text" value="Provide an answer"/>

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

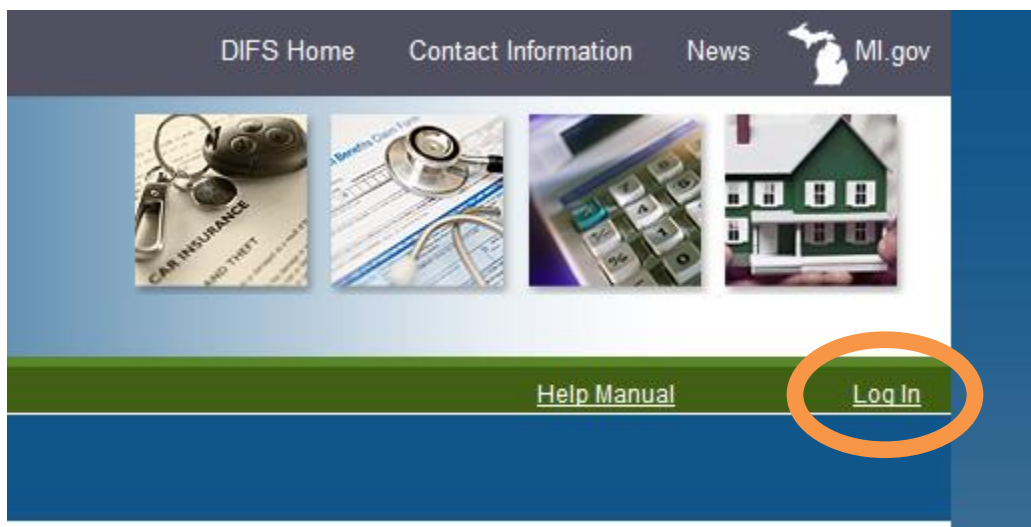
Your User ID is: sample@sample.com

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.



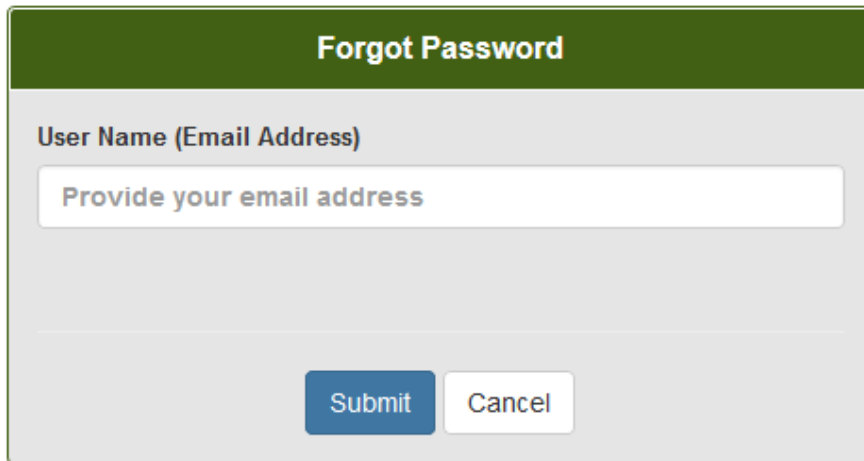
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Forgot Password

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.



The screenshot shows a web form titled "Forgot Password". The form is contained within a light gray box with a dark green header. The header contains the text "Forgot Password" in white. Below the header, the text "User Name (Email Address)" is displayed in a dark gray font. Underneath this text is a white input field with a light gray border and the placeholder text "Provide your email address" in a light gray font. At the bottom of the form, there are two buttons: a blue "Submit" button and a white "Cancel" button with a light gray border.

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.

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[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**

* **New Password**

* **Retype New Password**

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.

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The screenshot shows a web form titled "Change Your Password" with a dark green header. Below the header, there is a question "Why am I being asked to create a new password?". A light green message box states: "Your password has been successfully changed. You will be redirected to the login page momentarily." Below this are three required input fields: "* Current Password" with the placeholder "Provide your current password", "* New Password" with the placeholder "Provide a new password keeping the above requirements in mind", and "* Retype New Password" with the placeholder "Retype the new password". At the bottom are "Save" and "Cancel" buttons.

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.

Add a Provider

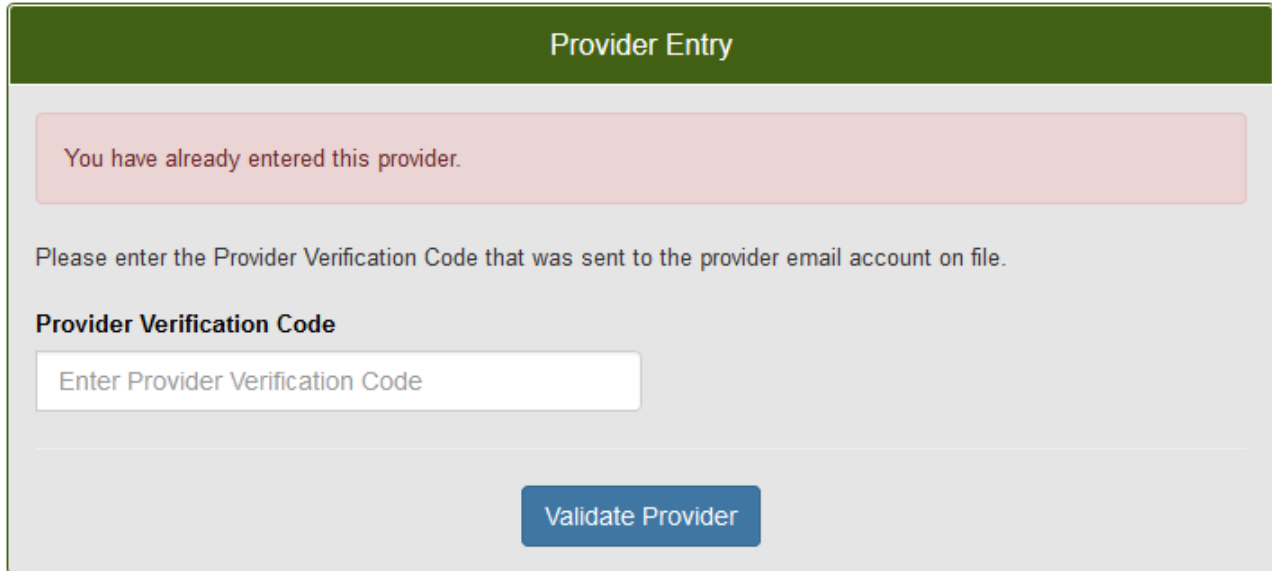
The screenshot shows a web form titled "Provider Entry" with a dark green header. Below the header, there is a prompt: "Please enter the Provider Verification Code that was sent to the provider email account on file." Below this is a text input field labeled "Provider Verification Code" with the placeholder "Enter Provider Verification Code". At the bottom is a "Validate Provider" button.

Figure 8: Provider Validation Screen

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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.

Add a Provider



The screenshot shows a web form titled "Provider Entry" with a dark green header. Below the header is a light gray background. At the top, a pink error message box contains the text "You have already entered this provider." Below this, a blue instruction reads "Please enter the Provider Verification Code that was sent to the provider email account on file." Underneath is the label "Provider Verification Code" followed by a white input field with the placeholder text "Enter Provider Verification Code". At the bottom center is a blue button labeled "Validate Provider".

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.

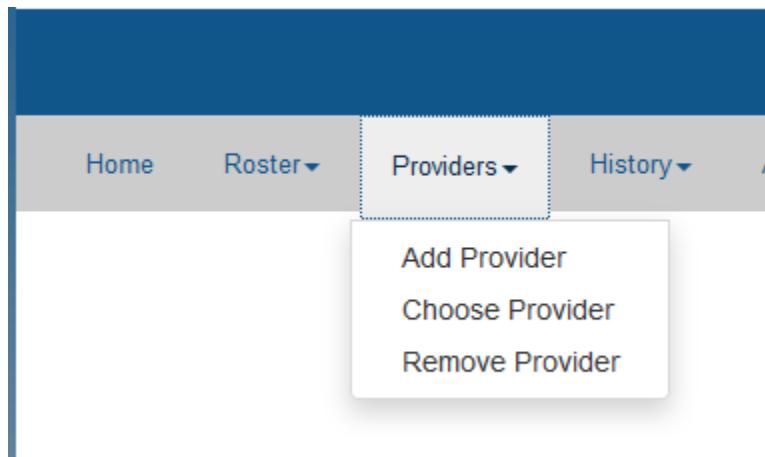


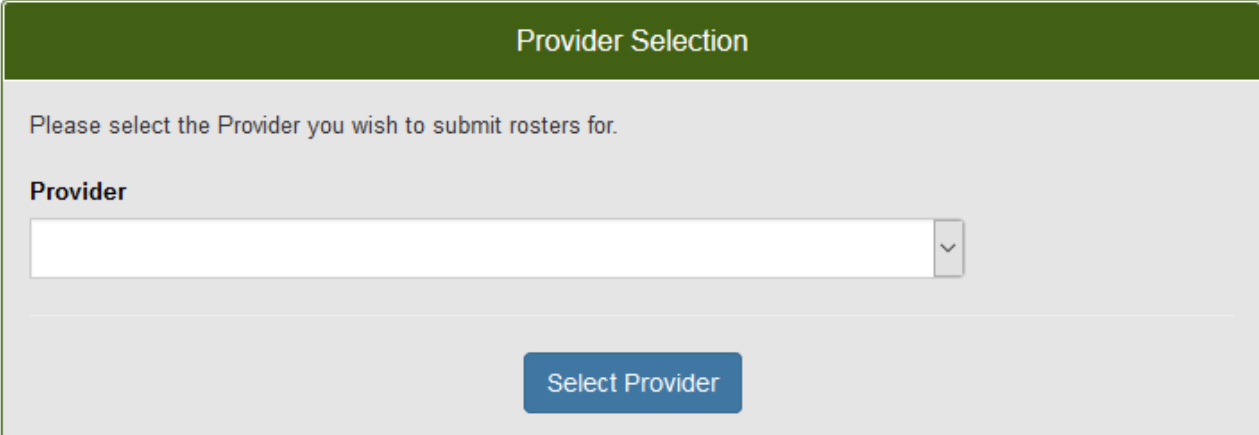
Figure 10: Add Provider from Menu

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

Select Provider

Figure 11: Choose Provider Screen

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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 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
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[Download Sample Text File](#) [Download Sample CSV File](#)

No file selected.

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	<ul style="list-style-type: none">Invalid Provider IDCourse not valid for this Provider 0007		
2	0931	58161			01/09/2017	0274701	JOY	VANNESTE	<ul style="list-style-type: none">Invalid Provider IDCourse not valid for this Provider 0007		

Figure 13: Data Entry Results displayed with Errors

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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

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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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	* Completion Date	* Individual System ID
<input type="text" value="54020 (WATERCRAFT & UMBRELLA - 2010)"/>	<input type="text" value="Enter the Date of Course Co"/>	<input type="text" value="Enter the Individual's System"/>
* Last Name	* First Name	
<input type="text" value="Enter the Individual's First Name"/>	<input type="text" value="Enter the Individual's Last Name"/>	

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	<ul style="list-style-type: none"> • Invalid Provider ID • Course not valid for this Provider 0007 		
2	0931	58161			01/09/2017	0274701	JOY	VANNESTE	<ul style="list-style-type: none"> • Invalid Provider ID • Course not valid for this Provider 0007 		

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

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

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

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



**Department of
Insurance and
Financial Services**



**MICHIGAN.GOV**
Michigan's
Official
Website

Payment Method



DIFS Continuing Education Payment Request

Welcome to the CEPAS Credit Card Processing Payment Module for the DIFS Continuing Education.
This process is being used as a secure means of processing credit card transactions.
Payment may be made with a valid Visa, Discover or MasterCard.
To begin the payment process, click on "Next" in the box below.

* Indicates required field

Choose method of payment

Pay by credit card



Back Next Exit

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.

* Indicates required field

Billing Address

Use Business Name
***First Name:**
M.I.:
***Last Name:**
***Street Line 1:**
Street Line 2:
***City:**
***State:** Select State
***Zip:**
***Country:** UNITED STATES
Phone:
***E-Mail:**

Payment Details

***Payment Amount:** USD

Payment Method

***Name on Card:**
***Card Number:**
***Expiration Date:** *** Month** *** Year**
***Card Verification Value(CVV2):** [What's This?](#)

Back Next Exit

Figure 21: Payment Details Screen

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Address
Billing Address: Mopar Crucials 3534tgr hyhy, AK 12345 jhmjhm@HGHEFG.NET
Payment Method
Credit Card  JULIE a WAGONER x1111 05/25
Payment Amount
Amount: 1.00 USD
Total: 1.00 USD
Back Pay Now Exit

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.

0931 TRACY'S EDUCATION SERVICES

1 of 1 Find | Next

Roster Report

Run Date: 04/27/2017

Provider #	Course #	Completion Date	License # (System ID)	Attendee Last Name	Attendee First Name	Submit Date
0931	58162	4/11/2017	0007677	WRIGHT	ADAM	4/27/2017

1 of 1

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.

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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.

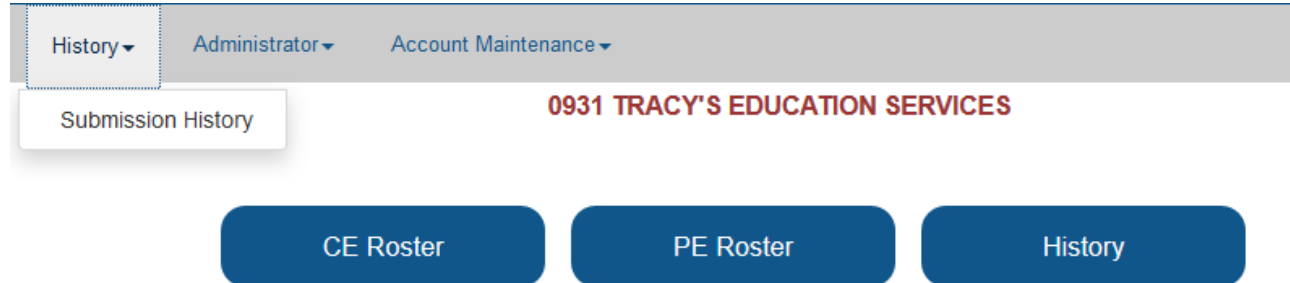


Figure 26: Submission History

At the View Submission History page, you can select PE submissions, CE submissions, or both (leave both boxes unchecked for both) to narrow down your choice.

View Submission History

Include CE Submissions Include PE Submissions

Provider

Please select a provider

Select

Figure 27: Select Provider

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

View Submission History

Include CE Submissions Include PE Submissions

Provider

0007 - MICHIGAN ASSOCIATION OF INSURANCE AGENTS (MAIA)

Select

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.

View Submission History

Include CE Submissions Include PE Submissions

Provider
 0007 - MICHIGAN ASSOCIATION OF INSURANCE AGENTS (MAIA)

[Select](#)

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

[Generate Roster Summary Report](#)
[Generate Completion Certificates for the Roster](#)

Provider ID	Course ID	Course Name	Course Credits	Completion Date	System ID	First Name	Last Name	Print Certificate
0007	54015	MICHIGAN HOMEOWNERS INSURANCE -2010	3	3/6/2017	0155281	ALFRED	TODD	Go
0007	54647	HOW TO GET YOUR SUBMISSION TO THE TOP	2	2/22/2017	0188499	SALEEM	SHAH	Go

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.