



Course Provider Application

Step-by-Step Guide

Overview

NMLS approved education is the only education that satisfies MLO license requirements. NMLS requires that organizations seeking to have PE or CE courses approved register and become recognized as an NMLS Approved course provider.

The provider application process for NMLS approval involves four steps:

- Step 1:** Review NMLS Approved Education Polices.
- Step 2:** Prepare Documentation.
- Step 3:** Request Education Management system (EMS) account.
- Step 4:** Submit Application.

Step 1: Review NMLS Approved Education Polices.

Before you begin the process, become familiar with NMLS policies and procedures. Visit [Policies and Notices](#).

Step 2: Prepare Documentation

The following documents must be provided to NMLS for review as part of your application. Be prepared to upload these as part of your application:

1. [Provider Application Checklist](#)
2. **Organization Structure and Ownership**
 - Organization chart naming the owners, principals, and investors. Highlight positions that will support NMLS approved education and explain their role.
 - Resumes of the owners, principals, and investors.
 - Current business license or another document that shows that you are authorized to do business.
 - Organization changes from the past five years listed in chronological order
3. **E-Commerce Policies and Procedures**
 - Privacy Policy
 - Refund Policy
 - Course Cancellation Policy
4. **Education Administration Policies and Procedures**
 - Registration
 - Attendance
 - Instructor hiring practices and policy



- NMLS Rules of Conduct for Students (ROCS); issuance and retainment
- End of course surveys as it relates to dissemination, collection, review, and response
- Data and document retention policy
- Course completion certificate example

Step 3: Request EMS account

New Course Providers must request and be granted access to EMS before applying for NMLS approval.

Choose one representative from your organization be the contact for the duration of the application process. Once approved, you can add additional contacts and users.

Follow these steps to request access to EMS:

1. Go to the [Education Management System \(EMS\)](#).
2. Click **EMS (Prospective NMLS Course Provider)**. Then **New NMLS Course Provider Registration**.

The image shows two screenshots of the CSBS (California State Board of Standards) website. The left screenshot displays the user selection page with the heading "What type of user are you?". The options listed are "Regulator", "EMS (Okta Login)", "EMS (Prospective NMLS Course Provider)", and "Internal CSBS Staff". A red box highlights the "EMS (Prospective NMLS Course Provider)" option, with a mouse cursor pointing to it. A blue arrow points from this option to the right screenshot. The right screenshot shows the login page with the heading "CSBS" and fields for "Username" and "Password". There is a checked "Remember me" checkbox and a "SIGN IN" button. A red box highlights the "New NMLS Course Provider Registration" link, with a mouse cursor pointing to it. A "Forgot your password?" link is also visible above the registration link.



3. Enter your information, click **Verify Information**, then click **Submit**.

The image shows two screenshots of the CSBS registration form. The first screenshot shows the form with empty fields for User Details (First Name, Last Name, Organization Name, DBA) and Contact Details (Email, Phone Number). A red box highlights the 'VERIFY INFORMATION' button. The second screenshot shows the form with sample data: First Name 'Sam', Last Name 'Smith', Organization Name 'School', and Phone Number '8888888888'. A green success message is displayed at the bottom: 'Success! Please click on Submit to continue with your registration.' A red box highlights the 'SUBMIT' button. An arrow points from the 'VERIFY INFORMATION' button in the first form to the 'SUBMIT' button in the second form.

Note: NMLS staff may reach out by email or phone within 2 business days if there are questions.

4. If granted access, you will receive an email with a username and temporary password. Continue to next step.
5. Return to the EMS login page. Enter your **username** and **temporary password** and click **Sign In**.

The image shows two screenshots of the CSBS login page. The first screenshot shows the 'What type of user are you?' selection screen with options: Regulator, EMS (Okta Login), EMS (Prospective NMLS Course Provider) (highlighted with a red box and arrow), and Internal CSBS Staff. The second screenshot shows the login form with fields for Username and Password, a 'Remember me' checkbox, and a 'SIGN IN' button (highlighted with a red box and arrow). Below the form are links for 'Forgot your password?' and 'New NMLS Course Provider Registration'.

Note: Find your username and temporary password is in the email

6. Change your password by entering the temporary password from the email as the current password and then setting a new password.

Once logged into EMS, you can initiate a new course provider application.



Step 4. Submit your Provider Application.

Note: The application process uses two portals. EMS and Basecamp. You will set up your Basecamp account later.

1. In EMS, click **Initiate Provider Application** in the left navigation panel.

The screenshot shows the NMLS Education Management System (EMS) dashboard. The navigation menu on the left includes 'Initiate Provider Application', which is highlighted with a red box and a red arrow. The main content area displays statistics for Pending Courses (0), Active Courses (0), Pending Inactive (0), and Inactive Courses (0). Below these are sections for 'Active Applications' and 'Courses with Renewal Due', both showing 'No items available'. The footer contains 'Hours of Operation', 'System Policies', and 'State Regulatory Registry, J. NMLS' contact information.

2. Enter your Business Demographic Information and click **Next**.
3. Answer the application questions and click **Next**.
4. Review the *Standards of Conduct for Approved Course Providers*.
5. **Add Signature** to confirm you read and agree to the *Standards of Conduct* and click **Next**.

The screenshot shows the 'Course Provider Application' form, specifically the 'Standards of Conduct Attestation' step. The form displays the 'STANDARDS OF CONDUCT FOR APPROVED COURSE PROVIDERS' document. At the bottom, there is a red box around 'View Entire Policy' and another red box around 'Add Signature'. Navigation buttons 'PREVIOUS', 'CANCEL', 'SAVE DRAFT', and 'NEXT' are visible at the bottom.



6. Review your information to ensure accuracy and click **Continue to Payment**.
7. **Click to Pay** will open the payment page.

Line Items	Amount	
Description		
Subtotal	\$100.00	
Credit Card Processing Fee	2.5% * \$100.00 = \$2.50	

ACH Total: \$100.00
Credit Card Total*: \$102.50
*Includes 2.5% processing fee

Please complete the payment info below to continue.

CLICK TO PAY

The payment page must be opened in a new tab. Click here to open the page. Once you have submitted the payment, close the tab and return to this page to click **COMPLETE** below.

COMPLETE

8. Enter your payment information and click **Submit Payment**.

Payment Page

Invoice Number: EMS-4-INV-6

CSBS Education Management System (UAT)

Payment Info
Amount: \$2,100.00
Choose payment method
Credit Card | ACH (eCheck)

Billing Info
Company Name
First Name *
Email Address
Phone #

Address 1 *
Address 2
City *
State *
Zip/Postal Code *
Country *
United !

Payment details
Card Number *
Expiration Date *
Security Code (CVV) *

You are currently running in test mode.
Please switch to live mode, in your HPP setup, to start accepting payments.

VISA | Mastercard | DISCOVER

Submit Payment

Privacy | Test



9. Return to EMS tab and click **Complete**.

The screenshot shows a web browser window with the URL <https://csbs-uat.appiancloud.com/suite/sites/ems/page/home>. The page title is "Course Application". The navigation menu includes HOME, APPLICATIONS, COURSES, and OFFERINGS & ROSTERS. The "Payment/Submission" tab is active. The "Fee Summary" section displays the following table:

Description	Amount
Application Fee	\$400.00
Fee Per Hour	\$20.00 * 1 hours = \$20.00
Subtotal	\$420.00
Credit Card Processing Fee	2.5% * \$420.00 = \$10.50

Summary Totals:

- ACH Total: \$420.00
- Credit Card Total*: \$430.50

*Includes 2.5% processing fee

A large blue button labeled "CLICK TO PAY" is present, with instructions: "The payment page must be opened in a new tab. Click here to open the page. Once you have submitted the payment, close the tab and return to this page to click **COMPLETE** below." A "COMPLETE" button is highlighted with a red box.

10. Close the *Pay* tab. A confirmation email is sent to the registered email to confirm payment.

11. An invitation to create a profile on Basecamp is sent within 2 business days of receipt of your payment. Email nmls.ed1@csbs.org if you do not receive an invitation.

Note: The approval process cannot begin until you have uploaded the required documents into Basecamp.

12. Open the invitation email and click the **Get Started** link.

13. Choose a username and password and click the **Create Account** button.

14. Log into your account.



15. Click the project link for your new provider application in the Your Projects section.

The screenshot shows the 'NMLS Course Provider Portal' interface. At the top, there is a navigation bar with 'Back to Projects' on the left and 'Jessica Esquina | My info | Sign out' on the right. Below the navigation bar is a header 'NMLS Course Provider Portal'. The main content area features a calendar for the week of Sun 4 to Sat 10. The date 'Tue 6' is highlighted in yellow and labeled 'Today 6'. Below the calendar, there is a project entry: 'New Provider Process — New Provider Application'. This entry includes a 'Message' link for 'Awaiting Documents - Provider Application' (Posted by Jessica E. TODAY) and a 'Milestone' link for 'Checklist and Documents Due' (Assigned to Jessica E. TODAY). On the right side, there is a 'Your projects' section with a red box highlighting the 'New Provider Application' link.

16. Click the Files tab.

The screenshot shows the 'New Provider Application' project page in a web browser. The browser's address bar shows the URL 'nmlscourses.basecampHQ.com/projects/15248001-new-provider-application/log'. The page header includes 'New Provider Application' and 'New Provider Process'. Below the header is a navigation bar with tabs: 'Overview', 'Messages', 'To-Dos', 'Calendar', 'Writeboards', and 'Files'. The 'Files' tab is highlighted with a red box. The main content area is titled 'Project overview & activity' and includes a calendar for the week of Sun 4 to Sat 10. The date 'Tue 6' is highlighted in yellow and labeled 'Today 6'. Below the calendar, there is a 'TODAY' section with a 'Message' link for 'Awaiting Documents - Provider Application' (Posted by Jessica E.) and a 'Milestone' link for 'Checklist and Documents Due' (Assigned to Jessica E.). On the right side, there is a 'Stay up to date on this project' section with options to 'Turn on email updates' and 'Project RSS feed'. Below that is a 'People on this project' section listing several users: Jessica Esquina (Latest activity 4 minutes ago), Paula Lindsay (Hasn't signed in recently), Michelle Gallagher (Hasn't signed in recently), Sierra Love (Hasn't signed in recently), SRR Staff (Hasn't signed in recently), and Michelle VanderNaalt.



17. Click the **Upload a File** button.

New Provider Application New Provider Process

Overview Messages To-Dos Calendar Writeboards **Files**

Upload a file

Provider.docx Remove

Category:

Optional description:

Choose another file to upload

No file chosen

Notify people via email

New Provider Process: Jessica Esquina

All of NMLS

Jessica Esquina Paula Lindsay Sierra Love

Michelle VanderNaalt Richard Madison SRR Staff

Michelle Gallagher

or Cancel

18. Choose the files for upload and **select the checkbox labeled SRR Staff**.

19. Click the **Upload the File** button.

Allow for **14 business days** from the upload date for your application to be reviewed and processed. If NMLS finds any issue with your application, you will be notified by phone and/or email.

Questions? Email nmls.ed1@csbs.org.

Post Approval: If your application is approved, congratulations on becoming an NMLS Approved Course Provider!

Next Steps:

1. Access EMS with Okta: NMLS Approved Course Providers access EMS through a single sign on platform called Okta, using Symantec VIP for authentication. See [Access EMS \(Okta\)](#) guide to get set-up.
2. Submit Course Applications: Once logged into EMS, [submit course\(s\) for NMLS Approval](#).