

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 <u>Policies and</u> <u>Notices</u>.

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.

CSBS	CSBS
What type of user are you?	Username
Regulator	Password
EMS (Okta Login)	✓ Remember me
EMS (Prospective NMLS Course Provider)	Forgot your password? SIGN IN New NMLS Course Provider Registration



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

CSBS	CSBS
User Details	User Details
First Name * Last Name *	First Name * Last Name * Sam Smith
Organization Name *	Organization Name *
	School
DBA	DBA
Contact Details	Contact Details
	Email*
Phone Number *	School@School.com
	Phone Number *
I'm not a robot	Success! Please click on Submit to continue with your registration.
VERIEV INFORMATION	SUBMIT

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**.

CSBS	CSBS
What type of user are you?	Username
Regulator	Password
EMS (Okta Login)	Remember me
EMS (Prospective NMLS Course Provider)	Forgot your password? SIGN IN 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.

MS EDUCATION MANAGEMENT SYS	TEM
Springer Foundation	0 Inactive Courses
Actions ActiveActions C2 Initiate Provider Application C Requiring My Attention All Active Applications Application ID I Course Number Course Name Type Status No items available	Last Modified On
+ Show Columns	Export to Excel
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- 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.

	Application Questions	Attestation	Confirmation	Payment/Submission
tandards of Conduct Attestation				
ise carefully read the NMLS Course Provider Standards of Condu	rct, and enter your first and last name as an electronic signature to affir	m that you have read and agree to the NMLS Course Provider Stands	ands of Conduct	
	STAI State Regulatory Regisi	NDARDS OF CONDUCT FOR APPROVED COURSE PROVID Approved February 4, 2010 By the Mortgage Testing and Education Board acting on behalf of try LLC (SRR) and Nationwide Mortgage Licensing Syste	ERS m and Registry (NMLS)	
he intent of NMLS to have all Approved Course Providers prom	ote themselves and their course offerings in accordance with the higher	st ethical standards. As such, NMLS approval status is granted with th	ne understanding that Course Providers will maintain the Standards	of Conduct listed below. Additionally, Approved Course Provid
red to operate in accordance with NMLS provider and course a	pproval policies to include:			
	come NMLS Approved - Initially published june 16, 2009			
Policy on Criteria for Granting Approval for a Course to Be Policy on NMLS Approved Pre-Licensure and Continuing Ed	ucation Classroom Formats and Standards - Initially published lune 1	16. 2009		
Policy on Criteria for Granting Approval for a Course to Be Policy on NMLS Approved Pre-Licensure and Continuing Ed Policy on Reporting (Banking) of Student Credits - Initially p	lucation Classroom Formats and Standards - Initially published June ublished June 16, 2009	16, 2009		
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- 6. Review your information to ensure accuracy and click **Continue to Payment**.
- 7. Click to Pay will open the payment page.

✔ ⓓ Home - Education I	Managemen 🗙 🖻 Pay	× +
HOME APPLICATIONS COURSES	OFFERINGS & ROSTERS	.
Fee Summary		d.
Line Items		血 ACH Tota : \$100.00
Description	Amount	E Credit Card Total*: \$102.50
Subtotal	\$100.00	*Includes 2.5% processing fee
Credit Card Processing Fee	2.5% * \$100.00 = \$2.50	
Please complete the payment info below	to continue.	
The paymer Once you have submitte	nt page must be opened in a ne d the payment, close the tab ar	w tab. Click here to open the page. nd return to this page to click COMPLETE below.
		COMPLETE

8. Enter your payment information and click Submit Payment.

Home - Education	n Management 🗙 🔲 P	ay × +
ê Payment Page	Invoice Number EMS-4-INV-6	CSBS Education Managment System (UAT)
Payment Info Amount: \$2,100.00 Choose payment method	Billing Info Company Name	Address 1 *
Credit Card ACH (eCheck) Payment details	First Name *	City *
Card Number *	You are currently running in tes lease switch to live mode, in your HPP setup, payments.	to start accepting
Expiration MM ~	Phone #	Zip/Postal Code *
YYYY ~ Security Code (cvv)		Country * United : v
		Submit Payment



9. Return to EMS tab and click Complete.



Course Application

Application Questions	Attestation	Confirmation	Payment/Submission
		🏦 ACH Tot	al: \$420.00
	Amount	Credit Card Total*: \$430.50 *Includes 2.5% processing fee	
	\$400.00		
\$20.00 * 1 hours	= \$20.00		
	\$420.00		
2.5% * \$420.00	= \$10.50		
	Application Questions Application Questions	Application Questions Attestation Amount \$400.00 \$20.00 * 1 hours = \$20.00 \$420.00 \$420.00 \$420.00 \$2.5% * \$420.00 = \$10.50 \$10.50	Application Questions Attestation Confirmation

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.

- 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 <u>nmls.ed1@csbs.org</u> 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.

COMPLETE



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

<u>Back to</u>	Projects	D							Jessica Esquina <u>My info</u> <u>Sign out</u>
NM	LS Cours	e Provider	Portal						
								~	
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	NMC	
	4	5	Today 6	7	8	9	10	<u>niiils</u>	
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	11	12 Checklist and Documents Due - Jessica E.	13	14	15	16	17	New Provider Application	
N	ew Provider Pr	ocess — New Provi	der Application						
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	Milestone Check	ist and Documents D	ше			Assigned	to Jessica E. TODAY	·	

16. Click the **Files** tab.

New Provider Appli	cation > Ovc ×	+					- 0
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Sun	Mon	Tue	Wed	Thu	Fri	Sat	Stay up to date on this project
4	5	Today 6	7	8	9	10	 Turn on email updates to receive a daily digest notifying you of any to-do items or milestones that were added or completed in the last day. Project RSS feed (What's RSS?)
11	12	13	14	15	16	17	People on this project
	Documents						NMLS
	E.						Jessica Esquina Latest activity 4 minutes ago
							Paula Lindsay
							Hasn't signed in recently
					View	he full calendar	Hasn't signed in recently Michelle Gallagher Hasn't signed in recently
TODAY Message Await	ing Documents	- Provider Applicat	ion		<u>View</u> Po	he full calendar	Hasn't signed in recently Michelle Gallagher Hasn't signed in recently Sierra Love Hasn't signed in recently
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17. Click the **Upload a File** button.

lew Provider Application New Provider Process	
Overview Messages To-Dos Calendar Writeboards Files	
Upload a file	
Provider.docx Category: No category Optional description:	Remove
Choose another file to upload Choose Files 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	
Upload the file 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 <u>nmls.ed1@csbs.org</u>.

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 <u>Access EMS (Okta)</u> guide to get set-up.
- 2. Submit Course Applications: Once logged into EMS, submit course(s) for NMLS Approval.