Course Provider Application Process

Overview

Before applying to be a course provider, visit the NMLS Course Provider Resources Page for information on how to submit your application, submit courses for approval, and access other resources. You can also find the following on the Course Provider Resources page:

- **User Guides** – provide detailed step-by-step instructions about how to complete every NMLS business process.
- **Policy Documents** – provide specific information on NMLS policies pertaining to such things as provider and course approval, course formats, credit banking, marketing standards, etc.
- **Functional Specification** – provides detailed technical information about how course must be constructed to satisfy conditions for approval.
- **Education Notices** - provide guidance about how to satisfy SAFE Act, CFPB or state agency education requirements.

The provider application process involves three steps:

**Step 1:** Prepare Required Documentation

**Step 2:** Submit the Online Application to the Education Management System

**Step 3:** Upload the Required Documents to the NMLS Course Approval Portal

If you encounter a problem during the application process, contact nmls.ed1@csbs.org.

Prepare Documentation

Certain materials must be submitted to NMLS for review as part of the course provider application process. The following documents must be uploaded:

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 retention
   - End of course surveys as it relates to dissemination, collection, review, and response
   - Data and document retention policy
   - Course completion certificate example

**Submit Application to the EMS**
1. Navigate to the [Education Management System](#).
2. Click the *New Course Provider? Click here to register* link.
3. Register your account.
4. Log into the EMS with your new username and the temporary password emailed to you.
5. Click the *Initiate Provider Application* button in the left navigation panel.
6. Enter your Business Demographic Information and click the **Next** button when done.
7. Answer the application questions and click the **Next** button when done.
8. Review the *Standards of Conduct for Approved Course Providers*.
9. Click the *Add Signature* button to sign and confirm that you have read and agree to the *Standards of Conduct*, then click the **Next** button when done.
10. Review your information entered to ensure accuracy and click the Continue to Payment button when done.

11. Enter your payment information and click the Submit Payment button.

12. Click the Complete button.

A confirmation email is sent to the registered email address when the application is complete. Contact nmls.ed1@csbs.org if you do not receive a confirmation by the following business day.

**Upload Documents to the Course Provider Portal**

An invitation to create a profile on Basecamp is sent within 24 to 48 hours (72 if you applied Friday-Sunday) of your application confirmation email.

If you have not received an invitation or link to Basecamp within the timeframe listed above, contact NMLS at nmls.ed1@csbs.org immediately. The approval process cannot begin until you upload the required documents into Basecamp.

1. Open the invitation and click the Get Started link.

2. Choose a username and password and click the Create Account button.

3. Log into your account.

4. Click the project link for your initial provider application in the Your Projects section.
5. Click the **Files** tab.

6. Click the **Upload a File** button.
7. Choose the files for upload and select the checkbox labeled Britton Anderson.

8. Click the **Upload the File** button.

Allow 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 immediately by phone and email.

If your application has not been approved and 14 days have passed, contact NMLS at nmls.ed1@csbs.org.