Navigating the License Requirements and Fees Chart

Video Transcript

This video will walk you through locating, downloading, and navigating the License Requirements and Fees Chart and provide tips and tricks to improve your experience.

If you do not have a Microsoft Excel license, we recommend importing the chart into a compatible application, like google sheets, to navigate the information provided more easily. I am using Excel on a Windows PC, if you are on a MAC or have the web version of Excel it may look slightly different.

Use this chart to view requirements and fees related to new applications, amendments, and periodic reporting along with the state-specific checklists, available through the Checklist Compiler, to build a complete picture of the fees and requirements that are needed for each situation and license or registration.

Let's begin by selecting the License Requirements and Fees Chart found on the checklist compiler page under Step One to download the file. I am using Google Chrome, and here you can see the file downloaded and is displayed in the upper right-hand corner of the browser. The browser you are using may be slightly different but typically these can be located from the downloads folder on your computer. Be sure to always revisit this page when needing to review license requirements because agencies can make changes at any time.

The chart is divided into three tabs: Company, Branch, and Individual. Select the tab that corresponds to your user type.

We will begin with the Company tab, which contains over 900 licenses and 60 columns of information.

Here are three tips to help you navigate this chart more effectively.

First, resize the column and wrap the text to ensure that you can see more information on the screen.

Second, use the filter to pick the state agencies and licenses that apply to the activity you are performing.

Third, show and hide columns to get the specific information you require.

Before we make any changes, we need to enable editing by selecting the enable editing button in the yellow bar at the top of the page.

Let's start off by resizing the columns and wrapping the text. To do so, highlight all cells by selecting the triangle between columns A and row one. This will automatically select, or highlight, everything within this tab.

Next, you will place your cursor between columns A&B until a line with arrows pointing right and left appears. This allows you to drag the column. Let's select and drag the column over until it's the right size.

Now, while everything is still highlighted, ensure you have wrapped text on so that no information is lost or cut off due to my altered column width. Go to Excel's Home tab and select the Wrap Test option from the third item above, labeled Alignment. It has an AB with an arrow and a C depending on your version of excel. When I do this, you'll notice that now the cells have expanded, and text is on the 2nd and 3rd lines.

Now let's talk about how to use the filter. The filter allows us to pick the state agencies and licenses that we require, so instead of seeing all 900 licenses on the company page, we will only see relevant information.

Let's try it out. We'll begin with column A or State Agency. I'm going to select the drop down in the state agency column. Options will appear, such as sorting, filtering, searching, and the ability to select or deselect the items that I do or do not need.

In this case, let's use the search and start typing Georgia. As I start typing, the applicable state agencies will appear. Once only the Georgia agency is selected, select Ok.

Now that we have the state agency, the applicable license or registration can be selected. In this case, instead of using the text filter, let's deselect the Select All option and select the license that we're looking for. I will select Check Casher and Money Transmitter and select OK. (00:04:34) This filters the list to the two licenses available. Now, I can scroll to the right and begin to see the information that I need for each license.

Keep in mind, the information in this License Requirements and Fees Chart is going to pertain to whether you are a new applicant, an existing licensee making an update, or seeking specific information such as periodic reporting requirements. In this case, you can show and hide columns that matter to you.

To understand how this works, let's hide columns based on the idea that I am a company applying for a new license, therefore I am only looking for new applicant requirements.

As you scroll over, you will see information about a variety of requirements, credit reports requirements, criminal background checks, and periodic reporting requirements to name a few.

Starting in column S is information related to ACNs or Advanced Change Notices. Now, if I'm a new applicant, these columns don't apply to me as I don't yet hold my license. So, I could hide these columns.

To hide a column that you don't need to see, hover over the first column header you wish to hide until a down arrow appears and select the column. To select more than one column, select the down arrow and drag over the additional columns that are not needed – this will highlight them. Then right click and select Hide from the menu to hide the selected columns. Now the only information that is viewable, so far, is related to me as a new applicant.

To learn more about what columns need to be shown or hidden depending on the action you are taking; we've developed a companion guide that will add clarity to the column headers and highlight the columns specific to each checklist type and periodic reporting. It is available in step 1 of the Checklist Compiler page.

So, let's recall, we recommended to:

First, resize the column and wrap the text to ensure that you can see more information on the screen.

Second, use the filter to pick the states, agencies, and licenses that apply to the activity you are performing.

Third, show and hide the columns you require.

These steps can be applied to all three tabs, to view company, branch and individual license and registration requirements.

Thanks for watching! If you have feedback, please complete the survey on the Checklist Compiler page.