# Table of Contents

**About this User Guide** ................................................................................................................................. 2

- Background and purpose .......................................................................................................................... 2
- Education Reporting Lifecycle .................................................................................................................. 2

**Setting up the user’s online account** ............................................................................................................ 3

- Linking Provider License to Online Account .......................................................................................... 3
- Online Services Login Screen .................................................................................................................. 3
- User Registration Screen .......................................................................................................................... 4
- Preview Registration Information ............................................................................................................. 5
- Email Verification ...................................................................................................................................... 5
- First Time Login ........................................................................................................................................ 6
- Linking Your Provider License ................................................................................................................ 6
- Linking Your License—Select Profession/Business .................................................................................. 7
- Linking Your License—Select License ....................................................................................................... 7
- Linking Your License—Error ..................................................................................................................... 8
- Linking Your License—Security Measures ............................................................................................... 8
- Linking Your License—License Preview .................................................................................................... 9
- Linking Your License—Confirmation ....................................................................................................... 10

**Using the Education Reporting Portal** ......................................................................................................... 11

- DBPR Online Services Login Screen ....................................................................................................... 11
- Navigating the Home Screen .................................................................................................................... 12
- Report Education Credits ...................................................................................................................... 13
- Select your Provider License ................................................................................................................... 13
- Entering Your Course Information ........................................................................................................ 14
- Entering and Submitting Attendee Information ...................................................................................... 15-16
- Successful Reporting Message ................................................................................................................. 16
- Confirmation Email .................................................................................................................................. 17
- DBPR Education Reporting Results Email .............................................................................................. 18-19
- Loading External Files ............................................................................................................................. 20
- Specifications for creating Attendance Files .......................................................................................... 21
- File Format Overview ............................................................................................................................. 21-22
- Formatting Instructions ............................................................................................................................ 23-24
ABOUT THIS USER GUIDE

This guide is for use by Department of Business and Professional Regulation approved Education Providers. Here education providers have a quick step method to report required education credits.

BACKGROUND AND PURPOSE OF EDUCATION REPORTING PORTAL

The Education Provider Portal is designed to provide a simple education credit reporting solution to DBPR approved Education Providers. Approved Education Providers will be able to log into the online portal utilizing the same credentials that were created online log into the DBPR Online Services Menu at myfloridalicense.com. Before using the online portal, education providers will have to first create a DBPR Online services account and link their provider licenses to that account.

WHAT THIS PROCESS SHOULD ACCOMPLISH

- More intuitive interface for Education Providers.
- Decreased reporting errors on Education Attendance File submissions.
- Increased reliability in Education Attendance File submissions.

EDUCATION CREDIT REPORTING LIFECYCLE
Linking a Provider License to the User’s Online Account

Before accessing the Education Provider Reporting Portal, the user must first need to create a DBPR Online Services account and link your provider license to that account. Most approved Education Providers have already linked their provider license to an Online Services account that they have already created. If this applies to you, please advance to PAGE 11 of this User Guide.

The user may begin this process by visiting DBPR’s Online Services Main Menu by clicking the DBPR ONLINE SERVICES link below.

DBPR ONLINE SERVICES

Procedures:

DBPR Online Services Login Screen

Once the user reaches the Main Menu page; the user must click the ‘Create My Account’ link under the ‘Create a New Online Profile’ menu.

![DBPR Online Services Login Screen](image-url)
User Registration Screen

This screen will prompt the user to add their Account Owner Contact Information, Account Login Information, Password Recovery Information and Security Measures. (The user account login user name/email must not include an underscore "_".)
Preview Registration Information

Next verify that the information entered on the preview registration page is accurate. If the user needs to make any changes just click the "edit" button, or if they wish to start completely over, they can simply click the "cancel" button. Please review this screen and click "save" when done.

Email Verification

Once information is saved, a Temporary Password is sent to the email provided on the registration page. The user should check their email for this temporary password. Click the “return” button on the User Registration- Temporary Password Issued page to be taken to the login page.

(If the user is having trouble receiving this email or if they do not see this email, they should first check their spam or junk folders within their email account. If they still have not received this email they should contact the Customer Call Center at (850) 487-1395.)
First Time Login

After receiving the verification email from DBPR the user must log into DBPR Online Services using the email chosen in the registration as the User ID temporary password provided in the confirmation email sent.

Linking Your Provider License to Your Online Account

Once the user has successfully logged in, the user must link their Provider license(s) to the online account created on the DBPR Online Service site. Clicking the ‘Link Existing License to My Account’ link under the ‘Functions’ menu to begin this process.
Linking License to Account – Select Profession/Business

User must then select the professional board related to the provider license they wish to link to the online account. For this example: to link the Community Association Manager procession select that profession in the drop down box and click next.

Linking License to Account – Select License

Next, user must select their education provider license type listed in the drop down box and input their provider license number. Afterward, click the next button at the bottom of the screen to move to the next screen. If any changes need to be made use the "previous" button to visit the screen before. If user must start completely over use the “cancel” button at the bottom of the screen.
**Linking License to Account – Error**

If the Provider identifies a license that does not exist for the specified license type, the user will receive an error saying 'License not found'. Please review the information in each box to verify if information has been entered correctly.

![Image of error screen]

**Linking License to Account – Security Measures**

After the user identifies their provider license, they will be directed to a screen where they will be prompted to key in an Initial Activation Code and verify that they are 'Not a robot'. The user's Initial Activation code will be the last four digits of the Social Security #Federal Tax ID # that is associated with their provider license in DBPR’s database. Click “next” at the bottom of the screen to continue.

![Image of security screen]
Linking License to Account – License Preview

This next screen will display the licenses that will be linked to the user’s account after completion.

After verifying that all of their Provider licenses are listed, the user will then click the ‘Add’ button to add your licenses to your online account.

(Note: Shown below is a list of all available DBPR approved education provider licenses.)
Linking License to Account – Confirmation

This is the last screen that the user will see in the license linking process. Once the user clicks the ‘Next’ button they will return to the Main Menu. Their provider licenses should now show as linked to their Online Services account.
Using the Online Education Reporting Portal

To begin reporting education credits using the Education Reporting Portal, the user must first create a DBPR Online Services account and link your provider license to that account. If the user has not already done so, please return to PAGE 3 for instructions.

Now that the user has created their DBPR Online Services account and has linked their provider license to that account, they are ready to log into the DBPR Education Reporting Portal.

The user may begin the process of reporting Education credits by clicking the DBPR EDUCATION REPORTING PORTAL link below.

DBPR EDUCATION REPORTING PORTAL

Procedures:

DBPR Online Services Login Screen

When the user reaches the Login screen of the Education Reporting Portal, they will login using the same email login and password created for your DBPR Online Services account. Please make sure that information is a direct match. Then click the “Sign In” button.
Navigating the Home Screen

Once the user logs into the Education Reporting Portal, they will be directed to the portal's Home Screen. This screen offers the user two options for reporting education credits to the department. These options are located on the portal's left sidebar and are titled ‘Report Education Credits’ and ‘Load External Files’.

The Report Education Credits option allows the user to create new Education Attendance files for submission.

The Load External Files option allows the user to load files that they have created using their own methods. Please click the link below for directions on how to use Load External Files feature to load your already prepared Course Attendance File.

LOAD EXTERNAL FILE DIRECTIONS

There is also a link underneath the introductory paragraph that takes the user to an Education Provider Resources page that contains helpful information and alerts for education providers.

Users may visit that page by following the link below.

EDUCATION PROVIDER RESOURCES
Report Education Credits

The Report Education Credits feature allows the user to build their Education Attendance files within the Education Reporting Portal. To begin this process, the user must click the "Report Education Credit" link on the application’s left sidebar.

Select your Provider License

Once the user selects the Report Education Credits link they will be directed to a screen where they will choose their provider license. The user must click the "Select" button on the right-hand side of the screen to move on to the Course Information screen.

(Note: Providers with multiple provider licenses should be able to see all of their licenses on this screen. If the user does not see all of their provider licenses on this screen, they should contact the department by calling 850-487-1395.)
Entering Your Course Information

On this screen the user must start by entering the completion date of the course that they are reporting for in the Course Date field. Then the user will select which course they are trying to report. Only courses that are current and up to date with the department will show up on the list.

(Note: The Education Reporting Portal will not allow the user to input courses that have a completion date older than two years.)
Entering and Submitting Attendee Information

On this screen the user will build and submit their Education Attendance file. Here each licensee that has completed the course selected must be added to the Course Reporting page. The user must add their course attendee’s license information by adding their last name, first name, middle initial (optional), occupation code and license number. Please verify that all information is entered correctly before adding. License number should match the licensee listed in the “Enter Course attendee License Information” section.

After each entry, the user will click the Add icon to move the course attendee down to the Course Attendees Entered list. If the user notices an error in one of the attendee records they’ve added they can simply click the minus icon to the right of the attendee on the list to remove that attendee from the list.

Once the Course Attendee list has been completed, the user will select the Submit icon to submit the list to the department’s FTP site where it will be picked up and loaded into the department’s database.

This is what Course Reporting screen will look like prior to the user filling out the attendee information.

![Course Reporting Screen](image_url)
This is what Course Reporting screen will look like after the user fills out and adds the attendee information.

Successful Reporting Message

After the user submits their attendance file, the portal display a Success screen serves as a confirmation of successful reporting. This message will tell the use to please allow 48 hours for your submission to be processed by the department and to call DBPR’s Customer Contact Center at 850-487-1395 if their course credit does not appear within 48 hours.
Initial Confirmation Email

Directly after submitting your electronic attendance file the department will send you an automated confirmation email that contains a copy of the Electronic Attendance file that was created by your online submission. The subject line of this email message will read, ‘CE File Uploaded to the DBPR FTP site successfully!’ This file comes in a .txt format and will display the all of the licenses that were indicated in your electronic submission. A sample of this email is shown below.

From: no-reply@myfloridacense.com
To: [Recipient's Email]
Subject: CE File Uploaded to the DBPR FTP site successfully!

Congratulations!

The attached file was generated and uploaded successfully by the Florida Department of Business & Professional Regulation’s CEReporting web application. Please allow 48 hours for your submission to be processed by the department.

Thank you,
Department of Business & Professional Regulation
DBPR Reporting Results Email Message

After submitting your electronic attendance file you will receive an automated ‘DBPR Reporting Results’ email message from the department. This is a separate email message from the ‘CE File Uploaded to the DBPR FTP site successfully!’ email that is generated at the time of your electronic attendance file submission.

There are two versions of the ‘DBPR Reporting Results’ email message; one that contains ‘Successful Upload’ in the Subject Line and one that contains ‘Record Rejection(s)’ in the Subject Line.

DBPR Reporting Results - Successful Upload

The ‘Successful Upload’ version of the DBPR Reporting Results email message contains a report that will display a status of ‘CE History record created’ in its ‘Result’ column confirming that all license records on your electronic attendance file were successfully updated in DBPR’s system. A sample of this email is shown below.

Dear Education Provider,

The electronic attendance file which you have submitted on behalf of [redacted] has been processed by the Department of Business and Professional Regulation (DBPR). The attached DBPREducationUpload_Report_20190604_22017903.csv (713 B) includes a summary of records submitted and confirms the successful status of your submission. The RESULT column will display the status of ‘CE History record created’ if your submission to the specified license record was successful or ‘CE History record already exists’ if the course credit you are trying to submit has previously been successfully submitted to the specified license record.

Should you have any questions, please call the department’s Customer Contact Center at 850-487-1395, or visit our website at myfloridalicense.com.

Sincerely,

Bureau of Education and Testing
DBPR Reporting Results – Record Rejection(s)

The ‘Record Rejection(s)’ version of the DBPR Reporting Results email message contains a report that will display a specific error in its ‘Result’ column if there was problem loading the education record to a licensee’s CE file.

Please visit the department’s Education Reporting Error Definitions & Solutions page for steps on how to resolve these errors. A sample of this email is shown below.

Dear Education Provider,

One or more of the education records that you electronically submitted to the Department of Business and Professional Regulation (DBPR), on behalf of , has been rejected by our system. Please review the attached DBPREducationUpload spreadsheet to review the impacted records and the reason(s) for rejection. The RESULT column will display any errors associated with your submission. For a detailed explanation of common causes of record rejection, visit this link: http://www.myfloridalicense.com/DBPR/examination-information/bet-report-error/

The RESULT column will also display the status of 'CE History record created' if your submission to the specified license record was successful or 'CE History record already exists' if the course credit you are trying to submit has previously been successfully submitted to the specified license record.

You may submit a corrected record using the department’s electronic reporting tool. Records submitted are processed on a daily basis, but may not be reflected in DBPR’s licensing system for up to 48 hours after submission.

Should you have any questions, please call the department’s Customer Contact Center at 850-487-1395, or visit our website at myfloridalicense.com.

Sincerely,

Bureau of Education and Testing
Loading External Files

When the user chooses the Load External Files option they will be directed to a screen where the user can load attendance files that they have developed themselves using the specifications provided by the department.

The user will be able to drag and drop or browse to their attendance files using the options in the on-screen Upload box. Once the user has confirmed that their attendance file has been added to the Upload box, they will click the Upload All Documents button to submit their attendance files to the department.
Specifications for creating Attendance Files

File Format Overview

The file is the information that you will be submitting to the department. It contains information that will identify you as the provider, the courses that were taught and the licensees that attended your course. There are also built in error correction tools to reduce transmission errors and allow the department to respond quicker to any problems that are found. The information you submit to the department will be displayed as lines on your screen. Each line will have a number in front of it indicating what it represents. We refer to these line numbers as the record Type.

There are five different record Types:

1 identifies the provider.
2 identifies the course.
3 identifies the attendees.
4 identifies the number of attendees in the course.
5 identifies the number of records on the file. Different courses and their attendees could be on a single file (total number of record Types 1-4).

All files sent to the department will contain only one record Type 1 and one record Type 5. Please note that you may submit multiple courses on each file. If you choose to do this you will need to create a separate record Type 4 for each class you are reporting.

Listed below is an example of a file that could have been sent by a provider. An explanation of the file follows the record example.

[Type 1] 11234567ABC Education Consultants 1234
[Type 2] 2765432103/31/2000Construction101
[Type 3] 3CB 0059036Smith, John
[Type 3] 3CS 0004021Smith, John
[Type 3] 3CB 0000109Conner, Nancy
[Type 4] 40003
[Type 2] 2234567804/01/2000Construction510
[Type 3] 3CB 0006780Johnson, John
[Type 3] 3EC 0000098Johnson, John
[Type 3] 3EY 000187Garrett, Greg
[Type 4] 40003
[Type 2] 2234567904/02/2000Plumbing and Wiring
[Type 3] 3CB 0059036Smith, John
[Type 3] 3CB 0006780Johnson, John
[Type 4] 40002
[Type 5] 50016emailaddress.com

*** Please note the bold faced print will not be on the report itself ***

There is one provider record (Type 1) from ABC Education Consultants (provider numbers: 1234567) with the pass code 1234.

There are three course records (Type 2). ABC Education Consultants is submitting three courses entitled: Construction 101 (course number 7654321), Construction 510 (course number 2345678), and Plumbing and Wiring (course number 2345679). These courses were given on 3/31/2000, 04/01/2000, and 4/02/2000, respectively.
There are eight attendee records (Type 3). Construction 101 (course number 7654321) had three attendees. Construction 510 (course number 2345678) had three attendees. Plumbing and Wiring (course number 2345679) had two attendees.

There are three course control records (Type 4). Construction 101 (course number 7654321) total attendee amount is three. Construction 510 (course number 2345678) total attendee amount is three. Plumbing and Wiring (course number 2345679) total attendee amount is two.

There is one EOF (End OF File) record (Type 5). The total amount of records on the entire file including the type 5 (EOF record) is 16 and the confirmation Email address is emailaddress.com. The provider should report all of the attendee's licenses if the course satisfies CE requirements for multiple licenses. For example: John Smith and Nancy Conner attended the first class but John Smith submitted two license numbers. He submitted both numbers because this class satisfied a CE requirement for each of his contractor licenses. The department can now give him attendance credit for each license.

Here is an example of what this .txt file would look like in Notepad.

```
112345678 ABC Education Consultants 1234521030
2765432103/31/2000construction101
3CB 0059036smith, John
3CS 004021smith, John
3CB 0000109Conner, Nancy
40002
2234567804/01/2000Construction510
3CB 0006780Johnson, John
3EC 000058Johnson, John
3EY 000018Garrett, Greg
40003
2234567904/02/2000Plumber and Wiring
3CB 0059036smith, John
3CB 0006780Johnson, John
40002
5001emailaddress.com
```

If the Provider Continuing Education Attendance File is not formatted correctly, the Bureau of Education & Testing will notify the provider. Education & Testing will work with the provider to correct the problem. After three incorrectly formatted production files, the department will review the provider's file transfer history and possibly make recommendations for action against the provider.
**Formatting Instructions**

When creating the Provider Continuing Education Attendance File, without using the application provided specific file specifications must be met. Once the file has been created, it can be sent to DBPR's FTP server using the Load External Files feature of the Education Reporting Portal.

The file must be a fixed length 78-character file.
The file must be saved as a TEXT file (extension .txt)

**Record Type 1 (Provider Record)**
There is only one provider record per file.

<table>
<thead>
<tr>
<th>In Space(s):</th>
<th>Name</th>
<th>Data Type</th>
<th>Length</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Record Type</td>
<td>Character</td>
<td>1</td>
<td>Will always be ‘1’</td>
</tr>
<tr>
<td>2-8</td>
<td>Provider Number</td>
<td>Numeric</td>
<td>7</td>
<td>7-digit provider number (i.e.: 1234567)</td>
</tr>
<tr>
<td>9-53</td>
<td>Provider Name</td>
<td>Character (CAPS)</td>
<td>45</td>
<td>Name of Provider (Remember that blanks count as spaces, too)</td>
</tr>
<tr>
<td>54-57</td>
<td>Provider Pass Code</td>
<td>Numeric</td>
<td>4</td>
<td>4 digit pass code</td>
</tr>
<tr>
<td>58-63</td>
<td>Application Version Number</td>
<td>Character</td>
<td>6</td>
<td>Will always be ‘V21030’</td>
</tr>
<tr>
<td>64-78</td>
<td>Spaces</td>
<td>Character</td>
<td>15</td>
<td>Spaces</td>
</tr>
</tbody>
</table>

**Record Type 2 (Course Record)**
There will be a separate course record for each course.

<table>
<thead>
<tr>
<th>In Space(s):</th>
<th>Name</th>
<th>Data Type</th>
<th>Length</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Record Type</td>
<td>Character</td>
<td>1</td>
<td>Will always be ‘2’</td>
</tr>
<tr>
<td>2-8</td>
<td>Course Number</td>
<td>Numeric</td>
<td>7</td>
<td>7-digit course number</td>
</tr>
<tr>
<td>9-18</td>
<td>Course Date</td>
<td>Date</td>
<td>10</td>
<td>MM/DD/CCYY (ie:12/01/2001)</td>
</tr>
<tr>
<td>19-78</td>
<td>Course Name</td>
<td>Character (CAPS)</td>
<td>60</td>
<td>Name of Course (Remember that blanks count as spaces, too)</td>
</tr>
</tbody>
</table>

**Record Type 3 (Attendee Record)**
For each course record there must be an attendee record. Attendee records always follow the course record to which they are related.

<table>
<thead>
<tr>
<th>In Space(s):</th>
<th>Name</th>
<th>Data Type</th>
<th>Length</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Record Type</td>
<td>Character</td>
<td>1</td>
<td>Will always be ‘3’</td>
</tr>
<tr>
<td>2-4</td>
<td>Occupation</td>
<td>Character (CAPS)</td>
<td>3</td>
<td>Type of license (i.e.: CB, VM, CAM, BK, SL, etc.)</td>
</tr>
<tr>
<td>5-14</td>
<td>License Number</td>
<td>Character (CAPS)</td>
<td>10</td>
<td>10-character license number</td>
</tr>
<tr>
<td>15-59</td>
<td>License Name</td>
<td>Character (CAPS)</td>
<td>45</td>
<td>Last, First Middle (i.e.: Smith, John Martin)</td>
</tr>
<tr>
<td>60-78</td>
<td>Spaces</td>
<td>Character</td>
<td>19</td>
<td>Spaces</td>
</tr>
</tbody>
</table>
Record Type 4 (Course Control Record)
For each course there must be a course control record. Course control records should always follow the attendee records.

<table>
<thead>
<tr>
<th>In Space(s):</th>
<th>Name</th>
<th>Data Type</th>
<th>Length</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Record Type</td>
<td>Character</td>
<td>1</td>
<td>Will always be ‘4’</td>
</tr>
<tr>
<td>2-5</td>
<td>Number of Attendees</td>
<td>Numeric</td>
<td>4</td>
<td>Number of Attendees for one course</td>
</tr>
<tr>
<td>6-78</td>
<td>Spaces</td>
<td>Character</td>
<td>73</td>
<td>Spaces</td>
</tr>
</tbody>
</table>

Record Type 5 (EOF (End of File) Record)
There is only one EOF (End of File) record per file. The EOF record is always the last record on the file.

<table>
<thead>
<tr>
<th>In Space(s):</th>
<th>Name</th>
<th>Data Type</th>
<th>Length</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Record Type</td>
<td>Character</td>
<td>1</td>
<td>Will always be ‘5’</td>
</tr>
<tr>
<td>2-5</td>
<td>Number of records on the file</td>
<td>Numeric</td>
<td>4</td>
<td>Total number of records on the file including the EOF record</td>
</tr>
<tr>
<td>6-78</td>
<td>Email address</td>
<td>Character</td>
<td>73</td>
<td>Receipt of file notification Email address</td>
</tr>
</tbody>
</table>

File Name
The file naming convention is that the file name must begin with the provider number followed by an underscore (_), followed by a seven-digit number followed by .TXT.
(Example 1234567_0101010.TXT)