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Introduction

The Education Provider Portal is an application designed to help Education Providers record and manage course credit information for Ohio’s insurance agents. Before you can begin using the portal however, there are some steps that must be taken to prepare you for using the portal. These steps include:

Step #1: Obtain a Gateway account. This provides access to the Education Provider application

Step #2: Log into the Gateway and associate yourself.

Step #3: You’re ready to begin using the portal to upload and manage schedule and roster information!
Step 1 – Obtain a Gateway Account

The Gateway page is displayed:

Open an internet browser window and type in the following URL:
https://gateway.insurance.ohio.gov

Click the red “click here” link to request a Gateway account
Ohio Department of Insurance Account Request - Disclaimer

Please read the information below. To continue, please indicate your agreement by clicking the "I Agree" button at the bottom of this screen.

Revised January 10, 2009 - The Ohio Department of Insurance (Department) recognizes the importance of privacy to our website visitors. Therefore, visitors should be aware of the following information:

Public Records
Visitors should be aware that, subject to certain statutory exceptions, most documents and records maintained by the Department, including but not limited to electronic data, are public records under Ohio law. Therefore, information submitted through this website may be subject to disclosure pursuant to a public records request.

Usage Statistics
In order to generate usage statistics to help us improve our website, we automatically collect information on every visitor to this website. However, this information does not disclose "personal identifiers" (such as name, address, telephone number, e-mail address, etc.). Each time a request is made to view a page within this website, our website creates a log file capturing generic user information. The following information is compiled to produce usage statistics:

- The IP address of the computer accessing our website
- The date and time the computer accesses our website
- The type of Internet browser, operating system, and screen resolution of the visitor
- The internet address of the site from which the visitor linked to our website

All information collected by way of server log files is used in aggregate form only and may be analyzed for trends and statistics.

Online Forms and E-mail
This website will not collect personally identifiable information (such as name, address, telephone number, etc.) unless you provide such information voluntarily and when necessary to provide a service to the public or to other state agencies. Any personal information voluntarily provided by visitors, including personal information from online forms and e-mail, will be used for the purpose stated on the web page and may also be shared with our staff and other agencies as required by law or pursuant to agency authority. Information submitted through this website may also be subject to disclosure pursuant to a public records request.

Web Cookies
Cookies are unlikely to be found anywhere on our website. However, temporary cookies may be used when necessary to complete a specific transaction. If a persistent cookie is required, the website discloses to visitors that a persistent cookie is being used. Any information collected on our website that includes information from persistent web cookies may also be subject to disclosure pursuant to a public records request.

Choices Available to Visitors Regarding Collection, Use and Distribution of Information
Visitors will only receive information from us in response to a request. There may be instances where we send ongoing updates or announcements to interested parties. In such cases, visitors will have the choice either not to receive these updates or announcements.

Security Measures
The Department will follow Ohio laws that require the establishment of reasonable precautions to prevent personal information from unauthorized modification, destruction, use, or disclosure. We take very seriously the integrity of the information and systems we maintain. Therefore, we have instituted security measures for all information systems under our control. These security measures are designed to identity attempts to tamper with this website. Information collected through these security measures may be used in connection with a criminal prosecution or other legal proceedings.

Access and Dispute of Information Rights
Pursuant to Ohio Revised Code, section 149.43, 1347.08 and 1347.09, users have rights to their information given to this site. In respect to inspecting, correcting or disputing. This is applicable to any information collected, in use, or disclosed.

Contact
Any further questions concerning the privacy policy for www.insurance.ohio.gov should be forwarded here.

Link Policy
Ohioinsurance.gov operates as a public service to Ohio residents and visitors. Ohioinsurance.gov provides links to external web sites that are not maintained or controlled by the Department. The Department is not responsible for the content of external web sites. A link to a non-governmental web site does not constitute endorsement. The decision as to which links appear on the Department’s website is within the sole discretion of the Department.

Read the disclaimer and click the “I Agree” button
Select the “Education Provider Portal” option and click the “Continue” button.
Once the “I Agree” checkbox is checked, the page expands to display the personal information field.
1. Enter the account information
2. Match the Captcha text
3. Click Continue
You will receive an email with a link:

```
ODI Account Notification

Thank you for requesting an account with the ODI Application Gateway. Your confirmation number is: ODI-2733

Please visit https://appsqa.insurance.ohio.gov/UI/ODI_Saap_Public/UI/AccountRequest.mvc/DisplayRequestorConfirmation?tid=2733 to confirm your account

After confirming your information, you will be able to login to your account. Soon after that, we will setup your access rights to the requested applications
```

Record your confirmation number, you’ll need that later

Click the link to confirm your account information
When you have successfully completed the confirmation process you will see the following Account Confirmation message.
**Step 2: Log into the Gateway and Associate Yourself**

Once your gateway account is established, the next step for a Provider Official is to associate themselves (and your gateway account) with the Education Provider by making a Gateway association request.

**Creating a Gateway Association Request**

To make a request

You may click the link at the end of creating your Gateway account to access the Gateway page, or type in the URL: https://gateway.insurance.ohio.gov
The **Ohio Department of Insurance Information System (ODIIS)** displays all application links available to you.

When the “Licensing Education Provider Portal” link is clicked, ODIIS displays the “Account Not Associated” web page.

Click the link to log into the Education Provider Portal

Enter your Education Provider ODIIS id and click the OK button
ODIIS refreshes the web page and displays a “Providers” page that lists the association request you have made.

When you request an association with an Education Provider, a notification of the request is sent to ODI. When ODI approves your request an email notification is sent to you letting you know that you are now associated with the provider. The Provider Official cannot proceed past this point until the request has been approved by ODI.

Click the Delete icon to withdraw your association request.

Click the link to take you to the Gateway login page.

From: Licensing CommunicationDEV_SVC  
Sent: Monday, November 05, 2012 12:50 PM  
To: Karen Vourvopoulos  
Subject: Important information regarding your Approved Affiliation Request

Dear Brutus Buckeye,

Your request for access to the Education Provider Portal has been approved by the Education section of the Licensing Division. You may now log into the Provider Portal using your user name and password. One you log in, you may use this portal to perform any of the following tasks:

1. Associate additional provider staff members to the portal  
2. Enter Course Schedules  
3. Enter Course Rosters  
4. Manage Provider Official Information

If you have questions, please call the Licensing Division at (614) 728-5860

Sincerely,

Ohio Department of Insurance
When you return to the Gateway and login, your Providers page now displays your Provider name in the “Affiliated Providers” section.

Click the “Show Courses” button to view all the Providers Courses.

Providers Page Legend

- **Unaffilate** your account with this provider
- **Subaccount Management** — associate others with this education provider account
- **Show Courses** — displays courses offered by this education provider
- **Add Education Providers** — adds education providers to your association list
Step 3: Upload and Manage Schedules and Rosters

Now that your gateway account is established and your education provider association request approved, you are ready to begin entering schedules and rosters.

Click the “Show Courses” button to view all the Providers Courses.
Provider Courses

The Provider Courses page includes two main sections:

1. **Education Provider Summary information**: basic information about the provider (ODIIS ID, Federal EIN, Name, and Education Type). This information is for display only and is not editable.

2. **Provider Courses**: a list of the active courses offered by this provider.
Provider Courses Information

The Provider Courses section displays general information about each course:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider Course ID</td>
<td>a unique identifier for courses offered by this provider (a combination of</td>
</tr>
<tr>
<td></td>
<td>the course id and the provider id)</td>
</tr>
<tr>
<td>Course Name</td>
<td>the name given to the course</td>
</tr>
<tr>
<td>Category</td>
<td>The category of the course (general, ethics, etc.)</td>
</tr>
<tr>
<td>Method</td>
<td>The method of course instruction (classroom, self-study, etc.)</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the course (active, inactive, etc.)</td>
</tr>
<tr>
<td>Effective Date</td>
<td>the date on which the course status began</td>
</tr>
<tr>
<td>Hours</td>
<td>the number of hours earned when completing this course</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>the date on which the course becomes inactive</td>
</tr>
</tbody>
</table>
Provider Courses Page Legend

- Displays the first page of information
- Displays the previous page of information
- Displays next page of information
- Displays last page of information
- Page display indicator (page one of one page)
- Number of courses displayed per page
- View course schedules for this course
- View course rosters for this course

Entering New Course Schedules

Click the “Schedule” icon to view schedule information for this course
Provider Course Schedules

The Provider Course Schedules page houses three main sections:

1. Provider Course Detail – includes detail information about the course
2. Provider Course Schedule Search Criteria – provides a list of criteria you may use to search for a specific course schedule
3. Provider Course Schedules – displays the search results. If no search criteria are used, all schedules for this course are displayed.
Provider Course Detail

The Provider Course Detail section lists the Provider Course ID for the selected course schedule and the Course Name. These are not editable fields.

Provider Course Schedule Search Criteria

The Provider Course Schedule Search Criteria provides a mechanism to search for a specific schedule by using a combination of search criteria.

In the example shown below, the search criteria searches for a date range, city, and zip code. Because of the search criteria used, the results displayed are narrowed to a single course schedule.
**Provider Course Schedules Display**

The Provider Course Schedules display lists all the schedules that match the search criteria entered.

This section of the page includes schedule information such as:

- **Start Date** of the schedule
- **Completion Date** of the schedule
- **Start Time** of the schedule
- **End Time** of the schedule
- The date the schedule was **Received**
- The location of the course schedule

**Provider Courses Schedules Page Legend**

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>✍️</td>
</tr>
<tr>
<td>✗</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Provider Course Schedules</th>
<th>Start Date</th>
<th>Completion Date</th>
<th>Start Time</th>
<th>End Time</th>
<th>Received</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider 1</td>
<td>10/27/2012</td>
<td>10/27/2012</td>
<td>8:00 AM</td>
<td>5:00 PM</td>
<td>11/01/2012</td>
<td>100 Park Place Blvd, Columbus, OH 43214</td>
</tr>
<tr>
<td>Provider 2</td>
<td>10/28/2012</td>
<td>10/29/2012</td>
<td>9:00 AM</td>
<td>3:00 PM</td>
<td>11/01/2012</td>
<td>100 Park Place Blvd, Columbus, OH 43214</td>
</tr>
<tr>
<td>Provider 3</td>
<td>10/13/2012</td>
<td>10/13/2012</td>
<td>8:00 AM</td>
<td>5:00 PM</td>
<td>11/01/2012</td>
<td>100 Park Place Blvd, Columbus, OH 43214</td>
</tr>
<tr>
<td>Provider 4</td>
<td>01/20/2012</td>
<td>01/20/2012</td>
<td>8:30 AM</td>
<td>4:10 PM</td>
<td>12/20/2011</td>
<td>Holiday Inn 4601 Eastgate Bl, Cincinnati, OH 45246</td>
</tr>
<tr>
<td>Provider 5</td>
<td>02/02/2011</td>
<td>02/02/2011</td>
<td>8:50 AM</td>
<td>4:10 PM</td>
<td>02/02/2011</td>
<td>Holiday Inn 4601 Eastgate Bl, Cincinnati, OH 45246</td>
</tr>
</tbody>
</table>

**Add Schedule**
Adding a Course Schedule

When you click **Add Schedule** ODIIS displays the Edit Provider Course Schedule popup window.

Red asterisk indicates a required field

Click here to add a course schedule

Click here to save the course schedule

When you click **Add Schedule** ODIIS displays the Edit Provider Course Schedule popup window.
Enter Course Schedule Information

- Click the Schedule icon for the course you want to add a schedule. ODIIS displays the Add Provider Course Schedule popup window.

- Enter the State Date of the schedule. ODIIS inserts this same date into the Compl. Date field.

- ODIIS defaults the Completion Date field to be the same as the Start Date, but you may change this date if the schedule required it.

- Enter the Start Time of the course.

- Enter the End Time of the course.

- Enter the location (address) of the course.

- Enter the City in which the course is held.

- ODIIS defaults to the State of Ohio, but you may select another state if required.

- Enter the zip code of the location of the course.

- You may enter a comment about the course, although this is not a required field.

- When all the information has been entered, click the Save button. ODIIS saves the information, closes the popup window, and displays the row of course information in the Provider Course Schedules section of the Provider Course Schedules page:
Entering Course Rosters

ODIIS displays the Provider Course Rosters page:

Click the Roster icon to add a course roster
Provider Course Roster Page

The Provider Course Roster page includes three main sections:

1. Provider Course Detail – includes detail information about the course
2. Provider Course Roster Search Criteria – provides a list of criteria you may use to search for a specific course roster
3. Provider Course Rosters – displays the search results. If no search criteria are used, all schedules for this course are displayed.
Provider Course Detail

The Provider Course Detail section lists the Provider Course ID for the selected course schedule and the Course Name. These are not editable fields.

Provider Course Roster Search Criteria

The Provider Course roster Search Criteria provides a mechanism to search for a specific roster by process date range or completion date range.

In the example shown below, the search criteria searches for a completion date range.
Provider Course Rosters Display

The Provider Course Rosters display lists all the rosters that match the search criteria entered.

Provider Courses Rosters Page Legend

- **Opens the Edit Provider Course Roster popup window**
- **Opens the Provider Course Roster page**
- **Deletes a Provider Course Roster. Only rosters with no people associated to them may be deleted.**
- **Opens the “Select Roster Schedule” popup window**
Adding a Course Roster

When you click Add Roster, ODIIIS displays the Select Roster Schedule popup window.

Click the action arrow for the schedule you want to add a roster to.
ODIIS displays the Add Provider Course Roster popup window.

When the schedule has been selected and saved, ODIIS displays the Provider Course Roster page.
**Provider Course Roster Page**

You may enter individuals to a roster, or upload an entire roster file from the Provider Course Roster page.

![Provider Course Roster Page](image)

**Provider Course Roster Page Legend**

- **Add Roster Member**: Displays the Roster Member search window
- **Upload File**: Displays a search window in which to add the file to upload
- **Submit Roster**: Submits the selected roster file

Returns to the Provider Courses page

Returns to the Provider Course Rosters page
**Entering Individual Roster Members**

You may enter a single individual to a roster by clicking **Add Roster Member**:

When **Add Roster Member** is clicked, ODIIS displays the “Associate individual to Roster” search window.
Enter the NPN or name and click here.
When **Find Individual** is clicked, ODIIIS searches for a match. All matching names/NPN's are listed in the search results section.

<table>
<thead>
<tr>
<th>Name</th>
<th>Instructor</th>
<th>Credits</th>
<th>NPN</th>
<th>Birth Date</th>
<th>Home State</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANDREW J CARSON</td>
<td></td>
<td>7</td>
<td>2778790</td>
<td>12/11/1970</td>
<td>OH</td>
<td></td>
</tr>
<tr>
<td>ANDREW SCOTT</td>
<td>✓</td>
<td>7</td>
<td>18388797</td>
<td>03/03/1986</td>
<td>OH</td>
<td></td>
</tr>
</tbody>
</table>

Check to indicate the individual was an instructor for the course

Edit credit hours earned

Click to select the individual you want to add to a roster

Close
Managing a Provider Course Roster

When individuals are added to the roster one at a time using Add Roster Member, ODIIIS displays them in the Roster Member section of the Provider Course Roster page.

Provider Course Roster Page Legend

Add Roster Member

- Displays the Roster Member search window
- Opens the Roster Member popup window to edit credit hours and/or Instructor flag
- Removes the individual from the roster

Upload File

- Displays a search window in which to add the file to upload

Submit Roster

- Submits the selected roster file
Provider Roster Member Rules

- Selecting the “Instructor” checkbox doubles the number of credit hours issued to the individual. You do not need to edit the credit hours for instructors; ODIIS will do that for you.
- You may have more than one instructor per roster
- You cannot edit credits hours to be more than the total course hours.
- You may enter fewer credit hours than the course total.
- Once a roster has been submitted, it cannot be edited.
- To delete a roster member from a submitted file, send an email to the Department at educprovider@insurance.ohio.gov.

Creating a Roster File

You may upload multiple roster members by creating a roster file, and uploading the file to ODIIS.

Roster File Rules

A roster file must adhere to the following guidelines:

- It must be a CSV (comma separated value) file, or a “tab delimited” file
- Each column of information must be formatted as a “Text” column. This allows “0” to be part of the NPN number.
- Instructor flag: 1=Yes, 0=No
- Each of these file types may be created from an Excel spreadsheet and saved as a CSV or Text (Tab delimited) file
- Give your file a name that is easily recognizable by you to identify the course and schedule associated with it.
- The file does not need a header row, although it will load successfully if one is included
Uploading a Roster File

You may enter multiple individuals into a roster by uploading an entire roster file:

When is clicked, ODIIS displays an Add Document popup window:

Click the link to search for the file to upload

Click here to choose a file to upload
ODIIS displays a “Choose File to Upload” window:

Highlight the file you want to upload and click Open

ODIIS displays the selected file in the Add Document popup window

Click the Upload button to upload the selected file
ODIS uploads the roster file and displays any errors that occurred during the upload process. In the example below, you can see a list of roster members uploaded to the roster, however, the “Add Document” popup window displays that a few errors were encountered.

Rosters with icons in the Action column have NOT been submitted! You may still add and delete roster members from this roster. Once a roster has been submitted, you can no longer add or delete roster members to it.

- To add additional individuals to a submitted roster, submit a new roster (individually or as an entire roster) for the same course and date.
- To delete credits from a submitted roster, send an email containing the name, NPN, and course ID to the Department at educprovider@insurance.ohio.gov.
**Provider Course Roster Page Legend**

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Roster Member</td>
<td>Displays the Roster Member search window</td>
</tr>
<tr>
<td>📏 ✓</td>
<td>Opens the Roster Member popup window to edit credit hours and/or Instructor flag</td>
</tr>
<tr>
<td>🗑️</td>
<td>Removes the individual from the roster</td>
</tr>
<tr>
<td>Upload File</td>
<td>Displays a search window in which to add the file to upload</td>
</tr>
<tr>
<td>Submit Roster</td>
<td>Submits the selected roster file</td>
</tr>
</tbody>
</table>

**Roster Error Messages**

When uploading a roster file, the upload process may encounter errors.

![Error Message Image]
Certain import errors may prevent roster members from being included in the roster upload process. In the example below, the following rows of the roster file contained errors:

<table>
<thead>
<tr>
<th>Row 1:</th>
<th>The header row of the file. This does not prevent the roster from being uploaded, however, this row was “ignored” during the upload process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rows 7, 8 and 11:</td>
<td>were ignored during the upload process because the name, NPN, or course hours did not match information in ODIIS (in this case the NPN’s were incorrect for each individual)</td>
</tr>
</tbody>
</table>

Add Document

There were errors processing your file.

- Input lines ignored: 1, 7, 8, 11

Click here to choose a file to upload.

Import Errors

- First Name, Last name, NPN, Instructor, Credit Hours
  - Christopher, Aluise, 16954179, 0, 7
  - Anthony, Cook, 16395406, 0, 7
  - Rober, Costas, 55123, 0, 7

Upload Close
**Submitting a Roster**

Once a roster is submitted, you cannot add or delete members from the roster file. You may add roster members individually, but the roster file is no longer editable.

When you click **Submit Roster**, ODIIS checks to make sure this is what you want to do:
Once the roster is submitted, edit and delete options are no longer available.

Click to view the roster confirmation
**Roster Confirmation of Credits**

When you click [View Confirmation], ODIIS displays the Ohio Confirmation of Credits Submitted report.

---

**Ohio Confirmation of Credits Submitted**

Charles E Miller  
Buckeye Education Services  
191 Main St  
Batavia, OH 45103  
96456  
November 06, 2012

Courses Completed for offering identified below.

Our records indicate that you submitted a roster for the course(s), the completion date(s), and the individuals listed below. If this confirmation does not agree with your records, contact us immediately for clarification or correction.

Prometric  
1260 Energy Lane  
St. Paul, MN 55108-5252  
Phone: 800.532.2170  
Fax: 800.735.7977  
E-mail: pro.ce-services@prometric.com

<table>
<thead>
<tr>
<th>Apprehending a Defendant</th>
<th>Credit(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>8975</td>
<td>7</td>
</tr>
<tr>
<td>11/01/2012 08:00:00 AM to 10/27/2012</td>
<td>100 Park Place Blvd.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Individual</th>
<th>NPN</th>
<th>Credit(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>CARL S KOLTAS</td>
<td>1421541</td>
<td>3</td>
</tr>
<tr>
<td>STEVEN M SMILEY</td>
<td>2775719</td>
<td>3</td>
</tr>
<tr>
<td>PATRICIA MATTHEWS MCCALL</td>
<td>1713016</td>
<td>3</td>
</tr>
<tr>
<td>HOWARD H HEROLD</td>
<td>1737717</td>
<td>4</td>
</tr>
<tr>
<td>WILLIAM H HOPPLE</td>
<td>1730607</td>
<td>3</td>
</tr>
<tr>
<td>JOLYNNE KELTY</td>
<td>15751325</td>
<td>4</td>
</tr>
</tbody>
</table>

The following individual(s) were included on the course completion provided, but do not match a producer with the Ohio Department of Insurance. Please confirm the number with the producer and notify us with correction. The individual may not be an Ohio producer.

<table>
<thead>
<tr>
<th>Individual</th>
<th>NPN</th>
<th>Credit(s)</th>
</tr>
</thead>
</table>

The enclosed roster contains the following:

Total number of student records : 6

Total Fee $42
Steps to Activating a Sub-Account User

To create a Gateway account, sub-account users must follow three steps:

Step #1: Obtain a Gateway account. This provides access to the Education Provider application

Step #2: Give your Provider Official the user name assigned to you for the Gateway account, normally this looks something like: firstname.lastname@odi (john.smith@odi).

Step #3: Have your Provider Official log into the Education Provider Portal and add you as a sub-account user for the appropriate Provider(s).

Before beginning step one, review the rules for Provider Officials and Sub-Account users.

Provider Official Rules

Provider Officials are the main contact person for the Provider and are subject to the following guidelines:

- Each Education Provider may have only one active Provider Official at any one time.
- The Provider Official is the main contact person for the provider, and is responsible for managing business information between the provider and the Department.
- The Provider Official may appoint multiple sub-account users.
- Only Provider Officials may create sub-accounts.
  - It is the Provider Official’s responsibility to manage sub-account user information, making sure they are following all the guidelines for entering course schedules and rosters, and keeping sub-account user information up-to-date.

Sub-Account User Rules

- Sub-Account users must create a Gateway Account before a Provider official can add them as a sub-account user.
- Sub-Account users may be Third Party vendors to the Provider, however, the Provider is ultimately responsible for the actions and activity of the Third Party vendor when they are performing transactions as a Sub-Account user to the Provider.
  - Each person functioning under the Third Party vendor’s contract must have their own gateway account and Sub-Account approval from the Provider Official.
Adding a Sub-Account User

The Sub-Account User must have a Gateway Account. Refer to Step 1 – Obtain a Gateway Account on page 6 of this document to set up a Gateway account for the sub-account user.

Once the sub-account user has their gateway account established the next step is to have the Provider Official add them as a Sub-Account user to the provider’s account list.

1. Provider Official: enter User Name
2. Enter your Password
3. Click the Sign In button
The Ohio Department of Insurance Information System (ODIIS) displays all application links available to you.

Now that the Provider Official is logged into the Education Provider Portal, he/she may add a sub-account user using the “Subaccount Management” icon:

[Click the link to log into the Education Provider Portal]

[Click the Subaccount Management icon]
The sub-account name entered **must match exactly** the gateway account name displayed in the email when the gateway account was created.
The new sub-account is listed in the “Provider Accounts” section of the page:
Deleting Sub-Account Users

You may remove a sub-account user from the Provider Accounts list by clicking the “Remove Provider User Access” icon.

The system displays the “Add Provider Sub-Account” popup window.

1. Click the Subaccount Management icon

2. Click to remove a sub-account user from the list
When the “Remove Provider User Access” icon is clicked, a “Please Confirm” dialog window is displayed:

![Image of dialog window]

③ Click Yes, to remove the sub-account user, or No, to close the “Please Confirm” dialog window.
Logging in as a Sub-Account User

1. Enter the Gateway User Name
2. Enter the Password
3. Click Sign In

The Gateway Portal Page is displayed listing the application(s) associated with the Gateway User Name and Password.

Click the Licensing Education Provider Portal link
When the Licensing Education Provider Portal link is clicked, the system displays the “My Providers” page, listing all the providers this sub-account user has permission to access.

Click the Action icon to view courses and enter schedules and rosters.
Addendum A: EPAY Instructions for CE Providers

It is not mandatory to pay your invoices online. Paper checks/money orders are acceptable.

If paying by check/money order please make payable to: “State of Ohio Treasurer”

Steps necessary to view Invoice and set-up E-Pay Account:

1. Go to www.insurance.ohio.gov
2. Click on Secured Logon (top left corner – above ODI Seal).
3. Find application titled “EPAY-Electronic ACH Payment & Invoice Viewing System”
4. Click on the “Login” link directly under “EPAY-Electronic ACH Payment & Invoice Viewing System Application”, then enter your User ID and password. (The User ID and password are the same as the User ID and password used with the Licensing Education Provider Portal.)
5. In the next screen, scroll down to the “Request Additional Affiliation” button at the bottom of the screen. Click on that button.
6. Click on “Organization Search”.
7. In the Payer ID field, enter the “ODI ID” number from your invoice (top left corner of the invoice).
8. Click “Search”.
9. When your provider name shows, click on the blue action arrow to the right of your provider name.
10. Wait for ODI to approve the affiliation. This should take between 30-60 minutes. Please DO NOT CALL the Department as this will slow down the approval process. Once ODI approves the affiliation, your provider name will show in the middle “Payer Affiliation” box on your payer profile.
11. Once your provider name appears in the “Payer Affiliation” box, select the icon that is a piece of paper with a magnifying glass over it to view your provider’s invoices.
12. Once the invoice list is displayed, click on the blue magnifying glass to view that invoice.
13. If you wish to pay your invoice online via Electronic Check or Credit Card, check the box under the payment section titled “Pay This Invoice” and follow the prompts from there.

Contact Information:

- Questions regarding paying invoices and/or establishing an E-Pay account, please contact Fiscal at 614-644-3266 or 614-752-0720.
- Questions regarding specific charges on invoice, please contact Licensing at 614-728-5860 or EducProvider@insurance.ohio.gov.