



ODI
Ohio Department
of Insurance

***Ohio Education
Provider Portal
User Guide***

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Governor

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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. All information received through the Education Provider Portal is instantaneously downloaded into an agent's licensing record and transcript.

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: Creating an ODI 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 – Creating an ODI Gateway Account

Purpose: Step-by-step instructions on how to create a new ODI Gateway account.

Note: This process applies to accounts for applications that use the ODI Gateway. Gateway location: <https://gateway.insurance.ohio.gov>

Note: *ODI takes our responsibility to safeguard user data seriously. As such, ODI reserves the right to verify information submitted and, if the account is for business purposes, verify that the requestor is authorized to perform the functions inherent to the application access being requested. This is true for initial account requests and/or upgrade requests.*

Step 1: Open a browser and navigate to the Gateway location. The screen should look like Figure 1 below.

Step 2: Using your mouse, click on the button to create an account; located in Figure 1 by the red outline.

Notes: The red outlines will not appear on your screen. Also, the account information shown is not for a valid Gateway account. You must enter information specific to your situation when requesting an account.

Figure 1:

Home | About ODI | Contact | Secured Sign In

ODI
Ohio Department
of Insurance

Ohio.gov State Agencies | Online Services

Application Gateway

Welcome to the Ohio Department of Insurance Application Gateway!

User name
[Can't remember your user name?](#)

Password
[Can't remember, or need to reset, your password?](#)

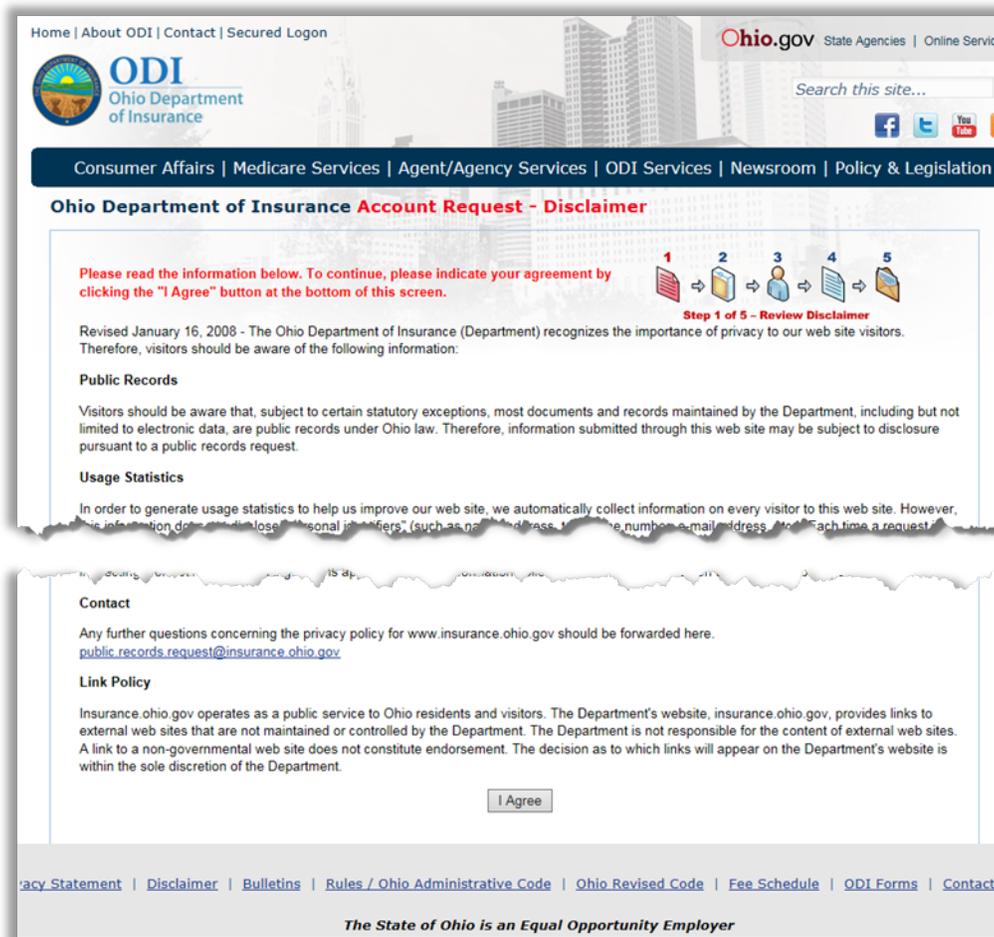
[Sign In](#) [Create an account](#)

Still having issues? Additional help is available here.

Step 3: The screen on the next page (Figure 2) explains some of the measures ODI takes to safeguard data and how we may use that data. Figure 2 is only a partial image of this screen. *You must agree to the information on this screen or you will not be able to proceed.*

Click the "I Agree" button at the bottom to continue.

Figure 2:



Step 4: On the following page, you will be asked to select the application to which you are requesting access. (If you already have a Gateway account, you are in the wrong place. Please read the document on requesting additional application access.) Figure 3 shows the list of applications with one already selected. Keep in mind the list of available applications can change over time.

Ohio Department of Insurance **New ODI Account – Request Access**

Figure 3:

Please select the area you would like to access. Depending on the area you choose, you may be asked to enter some personal information for identity purposes. You will also be asked to verify your email address using an automatically generated email with a link back to the Department's website. Once the verification process is complete you will be able to login and access certain applications. Some applications may not show up right away because they require that your company Point of Contact verify your employment before access can be granted. Once this process complete, the application will show up in your menu.



[Click here for a step-by-step guide.](#)

BUSINESS AREA AND/OR APPLICATION SELECTION	
<input type="radio"/> Agent Health Insurance Exchange Registration	This application is currently limited to Ohio licensed insurance agents who wish to have their Federal Health Insurance Exchange Registration noted on their Ohio insurance record. Access is not available to any individual who does not have an active Ohio insurance license and a National Producer Number (NPN).
<input type="radio"/> Annual Title Agent/Agency Review	Online submission of the Annual Title Review form for licensed Title Agents & Agencies.
<input type="radio"/> Captive Insurance - File Upload	Used for Captive Insurance companies to upload files.
<input checked="" type="radio"/> Education Provider Portal	This application is limited to Continuing Education Providers. Access is denied if you are not affiliated with an Ohio approved Continuing Education Provider.
<input type="radio"/> Fiscal Epay	The application used to pay invoices sent by the Ohio Department of Insurance.
<input type="radio"/> Licensing CE	This application is strictly limited to Prometric.
<input type="radio"/> Market Conduct Regulator Portal	This Regulator-Only portal facilitates interstate collaboration on Market Conduct Multi-State actions and activities. Access is limited to select State Insurance Department Market Conduct staff and approved Contractors.
<input type="radio"/> Missing Life Policy Search	The Ohio Department of Insurance's missing life insurance policy search service assists Ohio residents, and the families of deceased Ohio residents, in locating lost insurance policies that were purchased in the state. This application is to be used by insurance companies selling business in Ohio to aid in the search and discovery of these lost insurance policies.
<input type="radio"/> ODI Secured Communications	Select if you received a message requiring a secure login to view a message from the Ohio Department of Insurance (ODI).
<input type="radio"/> ORSA - Own Risk Solvency Assessment - File Upload	This application is to only be used by insurance companies needing to upload files in support of ORSA reporting to ODI.
<input type="radio"/> OSHIIP	The Ohio Senior Health Insurance Information Program (OSHIIP) provides free health insurance information and services to Medicare beneficiaries and the people that care for them. OSHIIP offers a toll-free hotline, 1-800-686-1578, free publications, a speakers bureau and training for volunteers.
<input type="radio"/> Risk Coordinated Exams	Provides access to examiners and consultants enabling them to share work papers on coordinated exams.
<input type="radio"/> Risk Exam File Uploads	Risk assessment exam file uploads. This application is to only be used by insurance companies needing to upload files in support of examinations conducted by ODI.
<input type="radio"/> Secure File Transfer	ODI Secure File Transfer

Select the "Education Provider Portal" option and click the "Continue" button.

Step 5:

The next screen (Figure 4) explains that you must only create an account for yourself to use and the rules that govern your use of this account. It also states that ODI may terminate an account without notice should these rules not be followed. ODI takes very seriously our commitment to securing the data you provide to us as well as the information we may collect from citizens of Ohio. Adhering to these rules is one way we maintain security. If you have any questions about the rules in Figure 4, please contact ODI. Click the checkbox affirming that you agree to follow these rules.

Figure 4:

Consumer Affairs | Medicare Services | Agent/Agency Services | ODI Services | Newsroom | Policy & Legislation

Ohio Department of Insurance **New ODI Account – Personal Information**

In order to protect your security and ensure the interests of the citizens of Ohio are safeguarded, there are some basic rules that ODI requires to be followed when an account is requested:

- When filling out the request form, you agree that the account you are requesting is for your use only and you will not share your account information. (Each person needing access to our systems must request their own account.)
- The name you enter must be your own name.
- The email address you enter needs to be for an email account that only you use, and this email account is not shared and is not a generic account.
- ODI routinely requires a password change to protect our systems and your account. If you are suddenly not able to log in, please change your password. A link is on the log in page.

By clicking the checkbox below you agree that you are abiding by the conditions set forth above, and that you acknowledge that if ODI determines you have not created your account as set forth above, ODI may, without notice, terminate that account and remove all access to its systems for that account.

I Agree

Step 6: Please enter all required fields on the Personal Information screen (Figure 5). Access to some applications may require more detailed information than access to other applications. At the bottom, enter the letters and/or numbers to verify you are human, then click the Continue button.

Figure 5:

Please fill out the form below. We need this information to confirm your identity and create your account.

Step 3 of 5 - Provide Personal Information

[Click here for a step-by-step guide.](#)

** indicates a required field*

Personal & Identification Information

*First Name: Middle Name: *Last Name:

*Date Of Birth:

*Security Question 1: *Answer: *Re-enter Answer:

*Security Question 2: *Answer: *Re-enter Answer:

*Security Question 3: *Answer: *Re-enter Answer:

Organizational Affiliation
Simply start typing the name of your organization. After a list of organization names appears, please select one. Please note, if your organization is not in the list, simply leave this and the affiliation type fields blank.

Affiliation Type:

Contact Information

*Email: *Confirm Email:

*Phone Type: *Phone Number: Extension:

*Address Type: *Address:

*City: *State: County: *Postal Code:

Additional Information

Submit Request
In order to submit this request, enter the letters you see in the image into the textbox below it, then click "Continue".
If the letters are unclear, click the image to generate a new set of letters.

[Click here to change the image.](#)

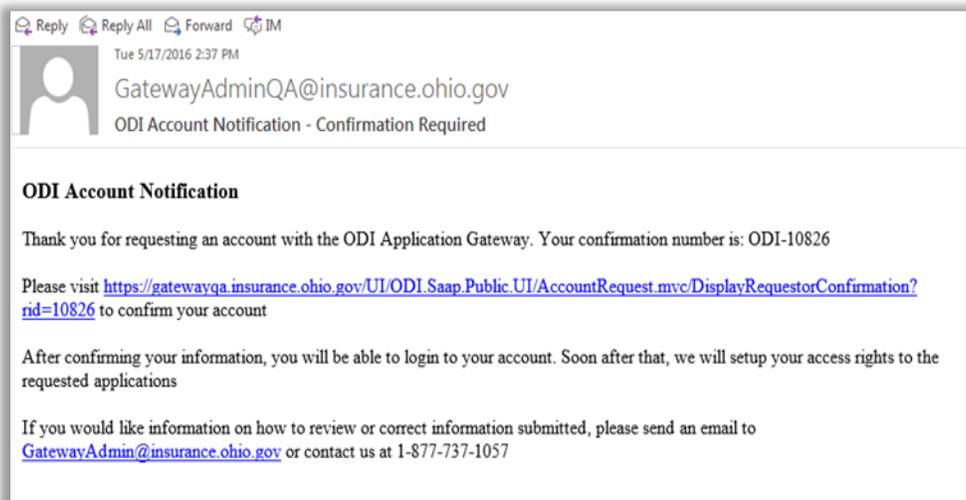
Step 7: The screen will now display a confirmation message (Figure 6) and you will receive an email at the email address you entered (Figure 7). If the application you requested access to requires review by an ODI employee, you will not receive the confirmation email immediately. If you

do not receive the confirmation email within 48 hours, please check your spam filter and (if a business) ask your IT department if the email could have been stopped before it was delivered to you. If you still can't find the email, please contact ODI at GatewayAdmin@insurance.ohio.gov, citing the confirmation number.

Figure 6:



Figure 7:



Step 8: Please click the link in the confirmation email. You will now create your password. Follow the steps in the next three images (Figures 8, 9 and 10).

Figure 8:

Ohio Department of Insurance Requestor Confirmation

CONFIRM ACCOUNT

Confirm account
Thank you for confirming the creation of your account with the ODI Application Gateway. Please complete the following form in order to verify your identity and to complete the account creation process.

In what city or town were you born in? [\(Answer a different question?\)](#)

Anytown

New Password

Confirm Password

Confirm Account

Optional: If you do not remember the answer to this question, you can click this link to receive a different one to answer.

Step 1: Enter the answer to the security question above.

Figure 9:

Ohio Department of Insurance Requestor Confirmation

CONFIRM ACCOUNT

Confirm account
Thank you for confirming the creation of your account with the ODI Application Gateway. Please complete the following form in order to verify your identity and to complete the account creation process.

In what city or town were you born in? [\(Answer a different question?\)](#)

Anytown

New Password

Confirm Password

Confirm Account

Password requirements

- ✗ At least eight characters in length
- ✓ Contains at least one lowercase letter
- ✓ Contains at least one uppercase letter
- ✗ Contains at least one number
- ✓ Contains at least one special character (\$, %, ^, +, =, (,), !)

This is the list of password requirements. Each must be met to conform to ODI password standards. The individual criteria indicators will change as they become met. Criteria with a ✗ have not been met and will change to a ✓ when it has been met.

Step 2. Type your password. You will need to enter it twice.

Figure 10:

Finished! You have now successfully created your Gateway account. Your username is displayed on the screen (Figure 11), and your password is what you entered in the previous step.

Figure 11:

here to log in.'"/>

Additional information regarding the process of adding other users to the provider's account may be found starting on page 46 of this handbook under Sub-Account User Rules. **Please note that sharing user names and passwords are against Departmental security policy. Each individual accessing the Ohio Education Provider Portal **MUST** have his/her own user name and password.**

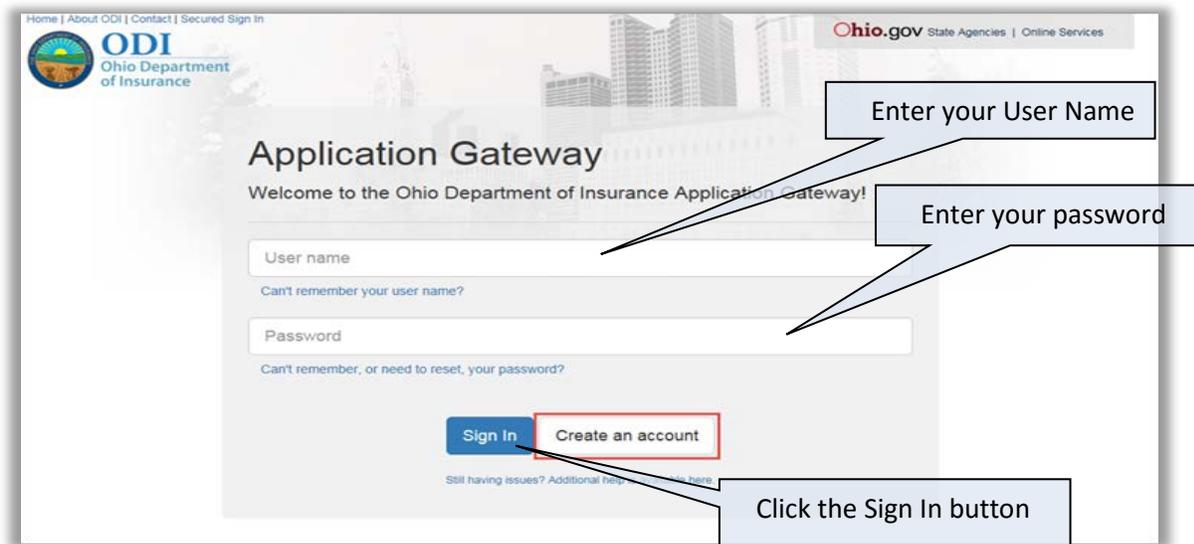
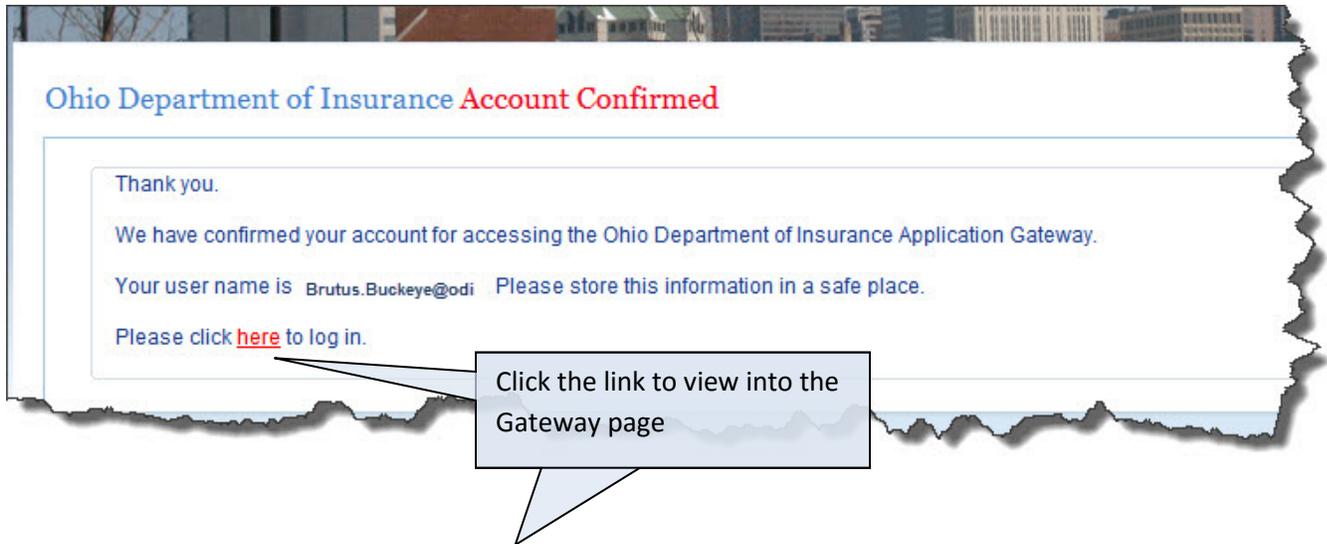
Step 2: Log into the Gateway and Associate Yourself

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.

Home | About ODI | Contact | Secured Sign In

Ohio Department of Insurance

Logged in as: brutus.buckeye@odi Log Off

Ohio Department of Insurance Gateway

Manage ODI Account Profile Information

Applications

- Licensing Education Provider Portal

Administration Tools

Helpful Links and Files

- Forgot Password
- Forgot Username
- Sign Up for an Account
- Point of Contact Form
- Point of Contact Email

Privacy Statement | Disclaimer | Bulletins | Rules / Ohio Administrative Code | Ohio Revised Code | Fee Schedule | Contact

Version: 1.4.5

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

Home | About ODI | Contact | Secured Sign In

Ohio Department of Insurance

Logged in as: brutus.buckeye@odi Log Off

Education Provider Portal | ODI Gateway

Home | Account Management | My Providers

Account Not Associated

Please note: Only Approved Education Provider Officials can request association with Ohio Education Providers.

Your account is not associated with any education providers. If you are an approved provider official, please enter the Provider ODIIS ID below to request access to the course, schedule and roster information. Please note, the information you entered during the gateway account registration process must match the provider official data the Department has on file. If you are not the approved provider official, please contact the provider official to obtain access.

Provider ODIIS ID:

Enter your Education Provider ODIIS id and click the OK button

Privacy Statement | Disclaimer | Bulletins | Rules / Ohio Administrative Code | Ohio Revised Code | Fee Schedule | Contact

Version: 1.0.56

ODIIS refreshes the web page and displays a “Providers” page that lists the association request you have made.

The screenshot shows the 'Providers' section of the Education Provider Portal. It features a navigation bar with 'Home', 'Account Management', and 'My Providers'. The main content area is divided into 'AFFILIATED PROVIDERS' (showing 'No providers found.' and an 'Add Provider' button) and 'PENDING PROVIDERS AFFILIATION REQUESTS'. A table lists a pending request for 'Buckeye Education Services' with columns for Provider Name, ODIIS ID, Federal EIN, Education, Status, Exp. Date, and Action. A red minus sign icon in the Action column is highlighted with a callout box that says 'Click the Delete icon to withdraw your association request'. Another callout box points to the 'No providers found.' message, stating 'Your association request is displayed'. The footer includes links for Privacy Statement, Disclaimer, Bulletins, Rules, Ohio Administrative Code, Ohio Revised Code, Fee Schedule, and Contact, along with the version number 1.0.

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. NOTE: If the Department does not have you listed as the provider official, you will not be able to associate yourself with the provider.***

The screenshot shows an email notification with the following details:

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

 The body of the email reads:

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. Once 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

 A callout box points to the [Provider Portal](#) link, stating 'Click the link to take you to the Gateway login page'.

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

Home | About ODI | Contact | Secured Sign In

Ohio Department of Insurance

Education Provider Portal | ODI Gateway

Logged in as: brutus.buckeye@odi Log Off

Home | Account Management

Providers

AFFILIATED PROVIDERS

Provider Name	ODIS ID	Federal EIN	Education	Status	Exp. Date	Action
Buckeye Education Services	158	00-0014459	Continuing Education	Approved	12/31/2012	

Add Provider

PENDING PROVIDERS AFFILIATION REQUEST

No requests found.

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

Privacy Statement | Disclaimer | Bulletins | Rules / Ohio Administrative Code | Ohio Revised Code | Fee Schedule | Contact

Version: 1.0.56

Providers Page Legend

	Unaffiliate 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.

The screenshot shows the Ohio Department of Insurance Education Provider Portal. At the top, there is a navigation bar with links for Home, About ODI, Contact, and Secured Sign In. The main header includes the Ohio Department of Insurance logo and the text "Education Provider Portal | ODI Gateway". The user is logged in as "brutus.buckeye@odi" and can log off. Below the header, there are tabs for "Home" and "Account Management". The main content area is titled "Providers" and contains two sections: "AFFILIATED PROVIDERS" and "PENDING PROVIDERS AFFILIATION REQUEST". The "AFFILIATED PROVIDERS" section displays a table with the following data:

Provider Name	ODIS ID	Federal EIN	Education	Status	Exp. Date	Action
Buckeye Education Services	156	00-0014459	Continuing Education	Approved	12/31/2012	 

Below the table is an "Add Provider" button. The "PENDING PROVIDERS AFFILIATION REQUEST" section shows "No requests found." A callout box with a white background and black border points to the blue plus button in the "Action" column of the table, containing the text: "Click the 'Show Courses' button to view all the Providers Courses". At the bottom of the page, there is a footer with links for Privacy Statement, Disclaimer, Bulletins, Rules / Ohio Administrative Code, Ohio Revised Code, Fee Schedule, and Contact, along with the version number "Version: 1.0.56".

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.

The screenshot displays the 'Education Provider Portal' interface. At the top, there is a navigation bar with links for Home, About ODI, Contact, and Secured Sign In. The Ohio Department of Insurance logo is prominently displayed. Below the navigation bar, the user is logged in as 'brutus.buckeye@odi' and can access Home and Account Management options.

The main content area is titled 'Provider Courses' and is divided into two sections:

- EDUCATION PROVIDER SUMMARY:** This section shows the following details:
 - ODIIS ID: 156
 - Federal EIN: 00-0014459
 - Name: Buckeye Education Services
 - Education Type: Continuing Education
- PROVIDER COURSES:** This section contains a table of active courses. The table has columns for P/C ID, Course ID, Course Name, Category, Method, Status, Eff. Date, Hour, Exp. Date, and Action. There are 10 courses listed, all with a status of 'Active' and an expiration date of 12/31/2012.

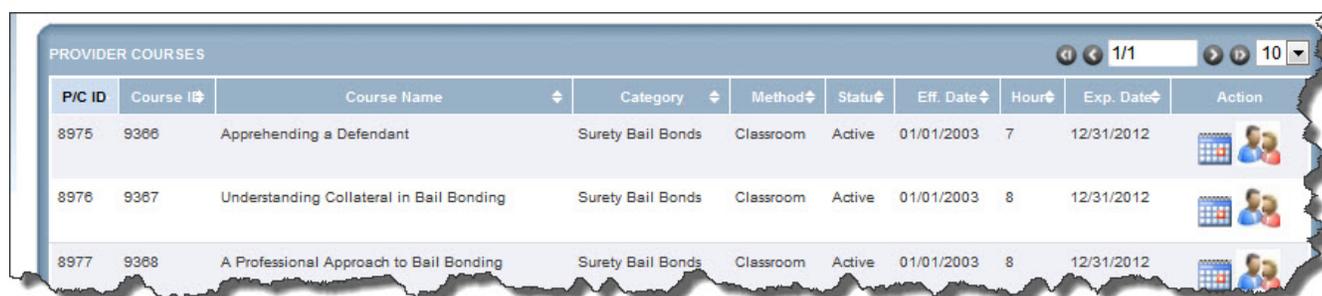
At the bottom of the page, there is a footer with links for Privacy Statement, Disclaimer, Bulletins, Rules / Ohio Administrative Code, Ohio Revised Code, Fee Schedule, and Contact. The version number is 1.0.56.

P/C ID	Course ID	Course Name	Category	Method	Status	Eff. Date	Hour	Exp. Date	Action
8975	9366	Apprehending a Defendant	Surety Bail Bonds	Classroom	Active	01/01/2003	7	12/31/2012	 
8976	9367	Understanding Collateral in Bail Bonding	Surety Bail Bonds	Classroom	Active	01/01/2003	8	12/31/2012	 
8977	9368	A Professional Approach to Bail Bonding	Surety Bail Bonds	Classroom	Active	01/01/2003	8	12/31/2012	 
8978	9369	Underwriting & Executing Bail Bonds	Surety Bail Bonds	Classroom	Active	01/01/2003	6	12/31/2012	 
8979	9370	Understanding Bail Bonds Past & Present	Surety Bail Bonds	Classroom	Active	01/01/2003	8	12/31/2012	 
8980	9371	Procedures for the Courts and Jails	Surety Bail Bonds	Classroom	Active	01/01/2003	7	12/31/2012	 
8981	9372	Understanding Rules & Regulations in Bail	Surety Bail Bonds	Classroom	Active	01/01/2003	7	12/31/2012	 
33492	33733	Ethics in Surety Bail Bonds	Ethics	Classroom	Active	01/01/2011	1	12/31/2012	 
33700	33674	Rules of Ethics	Ethics	Classroom	Active	11/29/2010	3	12/31/2012	 

Provider Courses Information

The Provider Courses section displays general information about each course:

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



PROVIDER COURSES									
PIC ID	Course ID	Course Name	Category	Method	Status	Eff. Date	Hour	Exp. Date	Action
8975	9366	Apprehending a Defendant	Surety Bail Bonds	Classroom	Active	01/01/2003	7	12/31/2012	 
8976	9367	Understanding Collateral in Bail Bonding	Surety Bail Bonds	Classroom	Active	01/01/2003	8	12/31/2012	 
8977	9368	A Professional Approach to Bail Bonding	Surety Bail Bonds	Classroom	Active	01/01/2003	8	12/31/2012	 

PROVIDER COURSES									
P/C ID	Course ID	Course Name	Category	Method	Status	Eff. Date	Hour	Exp. Date	Action
8975	9386	Apprehending a Defendant	Surety Bail Bonds	Classroom	Active	01/01/2003	7	12/31/2012	 
8976	9387	Understanding Collateral in Bail Bonding	Surety Bail Bonds	Classroom	Active	01/01/2003	8	12/31/2012	 
8977	9388	A Professional Approach to Bail Bonding	Surety Bail Bonds	Classroom	Active	01/01/2003	8	12/31/2012	 

Provider Courses Page Legend

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

Entering New Course Schedules

PROVIDER COURSES									
P/C ID	Course ID	Course Name	Category	Method	Status	Eff. Date	Hour	Exp. Date	Action
8975	9386	Apprehending a Defendant	Surety Bail Bonds	Classroom	Active	01/01/2003	7	12/31/2012	 
8976	9387	Understanding Collateral in Bail Bonding	Surety Bail Bonds	Classroom	Active	01/01/2003	8	12/31/2012	 
8977	9388	A Professional Approach to Bail Bonding	Surety Bail Bonds	Classroom	Active	01/01/2003	8	12/31/2012	 

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.

Home | About ODI | Contact | Secured Sign In

Ohio Department of Insurance

Education Provider Portal | ODI Gateway

Logged in as: brutus.buckeye@odi Log Off

Home | Account Management | My Providers

Provider Course Schedules

PROVIDER COURSE DETAIL

Provider Course ID: Course Name:

PROVIDER COURSE SCHEDULE SEARCH CRITERIA

Start Date From : To : Process Date :

Compl. Date From : To : City Name : Zip Code :

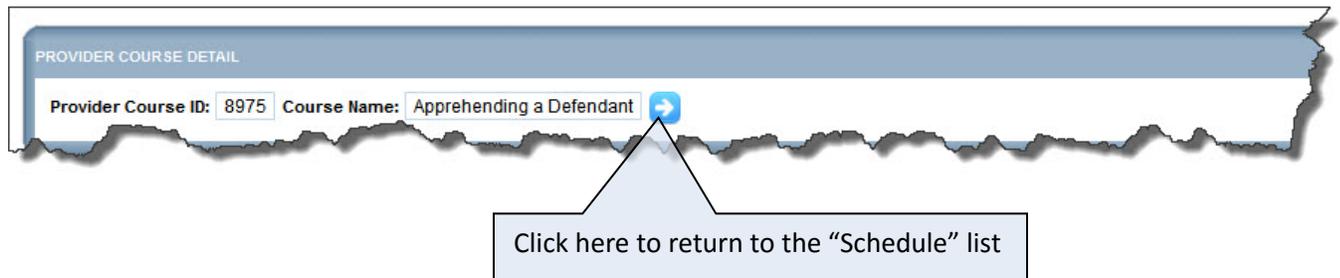
PROVIDER COURSE SCHEDULES

1/2 5

Start Date	Completion Date	Start Time	End Time	Received	Location	Action
10/27/2012	10/27/2012	8:00 AM	3:00 PM	11/01/2012	100 Park Place Blvd. Columbus, OH 43214	
10/20/2012	10/20/2012	8:00 AM	3:00 PM	11/01/2012	100 Park Place Blvd. Columbus, OH 43214	
10/13/2012	10/13/2012	8:00 AM	3:00 PM	11/01/2012	100 Park Place Blvd Columbus, OH 43214	
01/25/2012	01/25/2012	8:30 AM	4:10 PM	12/20/2011	Holiday Inn 4501 Eastgate Blvd Cincinnati, OH 45245	
02/02/2011	02/02/2011	8:30 AM	4:10 PM	02/02/2011	Holiday Inn 4501 Eastgate Cincinnati, OH 45245	

Provider Course Detail

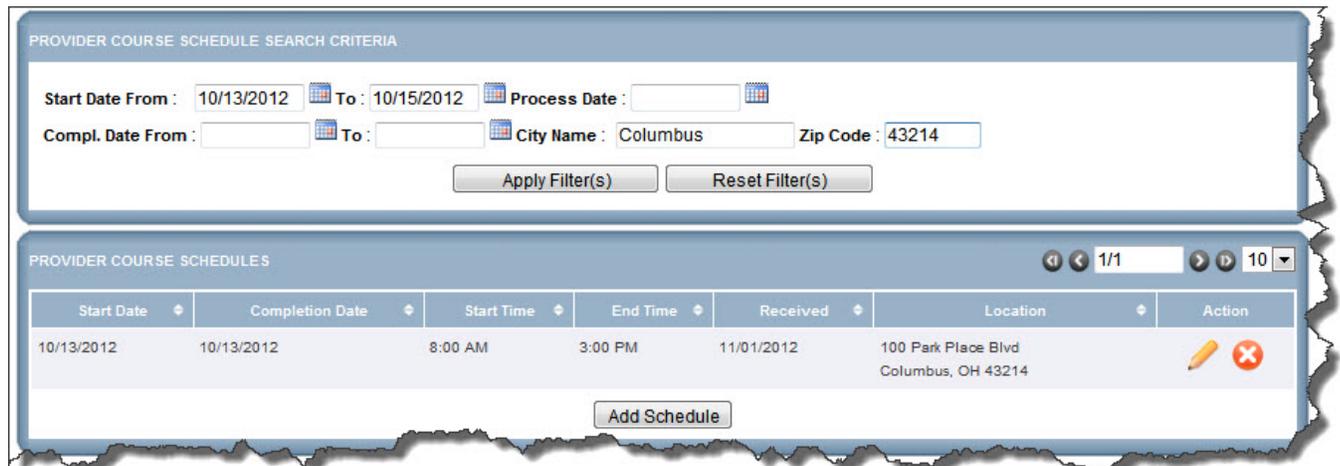
The Provider Course Detail section lists the Provider Course ID for the selected course schedule and the Course Name. These are not editable fields.



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.

Start Date	Completion Date	Start Time	End Time	Received	Location	Action
10/27/2012	10/27/2012	8:00 AM	3:00 PM	11/01/2012	100 Park Place Blvd. Columbus, OH 43214	
10/20/2012	10/20/2012	8:00 AM	3:00 PM	11/01/2012	100 Park Place Blvd. Columbus, OH 43214	
10/13/2012	10/13/2012	8:00 AM	3:00 PM	11/01/2012	100 Park Place Blvd Columbus, OH 43214	
01/25/2012	01/25/2012	8:30 AM	4:10 PM	12/20/2011	Holiday Inn 4501 Eastgate Blvd Cincinnati, OH 45245	
02/02/2011	02/02/2011	8:30 AM	4:10 PM	02/02/2011	Holiday Inn 4501 Eastgate Cincinnati, OH 45245	

[Add Schedule](#)

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

	Opens the Edit Provider Course popup window
	Deletes a Provider Course Schedule. A course schedule must not have a roster attached to it to be deleted
Add Schedule	Opens the "Add Provider Course Schedule" popup window

Adding a Course Schedule

PROVIDER COURSE SCHEDULES

Start Date	Completion Date	Start Time	End Time	Received	Location	Action
10/27/2012	10/27/2012	8:00 AM	3:00 PM	11/01/2012	100 Park Place Blvd. Columbus, OH 43214	 
10/20/2012	10/20/2012	8:00 AM	3:00 PM	11/01/2012	100 Park Place Blvd. Columbus, OH 43214	 
10/13/2012	10/13/2012	8:00 AM	3:00 PM	11/01/2012	100 Park Place Blvd Columbus, OH 43214	 
01/25/2012	01/25/2012	8:30 AM	4:10 PM	12/20/2011	Holiday Inn 4501 Eastgate Blvd Cincinnati, OH 45245	
02/02/2011	02/02/2011	8:30 AM	4:10 PM	02/02/2011	Holiday Inn 4501 Eastgate Cincinnati, OH 45245	

[Add Schedule](#)

Click here to add a course schedule

When you click [Add Schedule](#) ODIIS displays the Edit Provider Course Schedule popup window.

Add Provider Course Schedule

Start Date : * 11/03/2012 

Compl. Date : * 11/03/2012 

Start Time : * 8 00 AM

End Time : 3 AM

Location : * 100 Park Place Blvd

City : * Columbus State : * OH Zip : * 43214

Comment :
this course includes a 15 minte break at the half way point

[Save](#) [Close](#)

Red asterisk indicates a required field

Click here to save the course schedule

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.

Add Provider Course Schedule

Start Date : * 11/03/2012

Compl. Date : * 11/03/2012

Start Time : * 8 00 AM

End Time : 3 AM

Location : * 100 Park Place Blvd

City : * Columbus State : * OH Zip : * 43214

Comment :
this course includes a 15 minte break at the half way point

Save Close

- Enter the Start 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:

Start Date	Completion Date	Start Time	End Time	Received	Location	Action
11/03/2012	11/03/2012	8:00 AM	-	11/06/2012	100 Park Place Blvd Columbus, OH 43214	

Entering Course Rosters

The screenshot shows the Ohio Department of Insurance Education Provider Portal. At the top, there are navigation links: Home, About ODI, Contact, and Secured Sign In. The Ohio Department of Insurance logo is visible. The user is logged in as brutus.buckeye@odi. The main content area is titled "Provider Courses" and includes an "EDUCATION PROVIDER SUMMARY" section with fields for ODIIS ID (156), Federal EIN (00-0014459), Name (Buckeye Education Services), and Education Type (Continuing Education). Below this is a "PROVIDER COURSES" table with columns for P/C ID, Course ID, Course Name, Category, Method, Status, Eff. Date, Hour, Exp. Date, and Action. The table lists three courses, each with a "Roster" icon in the Action column. A callout box points to the Roster icon for the first course.

P/C ID	Course ID	Course Name	Category	Method	Status	Eff. Date	Hour	Exp. Date	Action
8975	9366	Apprehending a Defendant	Surety Bail Bonds	Classroom	Active	01/01/2003	7	12/31/2012	Roster
8976	9367	Understanding Collateral in Bail Bonding	Surety Bail Bonds	Classroom	Active	01/01/2003	8	12/31/2012	Roster
8977	9368	A Professional Approach to Bail Bonding	Surety Bail Bonds	Classroom	Active	01/01/2003	8	12/31/2012	Roster

Click the Roster icon to add a course roster

ODIIS displays the Provider Course Rosters page:

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.

Home | About ODI | Contact | Secured Sign In

Ohio Department of Insurance

Education Provider Portal | ODI Gateway

Logged in as: brutus.buckeye@odi Log Off

Home | Account Management | My Providers

Provider Course Rosters

PROVIDER COURSE DETAIL

Provider Course ID: Course Name:

PROVIDER COURSE ROSTER SEARCH CRITERIA

Process Date From : To : Completion Date From : To :

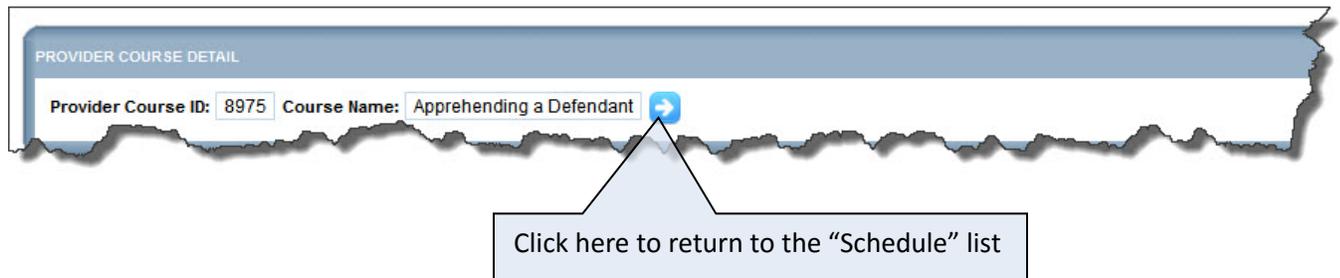
PROVIDER COURSE ROSTERS

1/1 10

Process Date	Action
01/31/2012	
01/31/2012	
02/11/2011	
10/28/2009	
10/25/2007	
10/20/2005	
09/19/2003	

Provider Course Detail

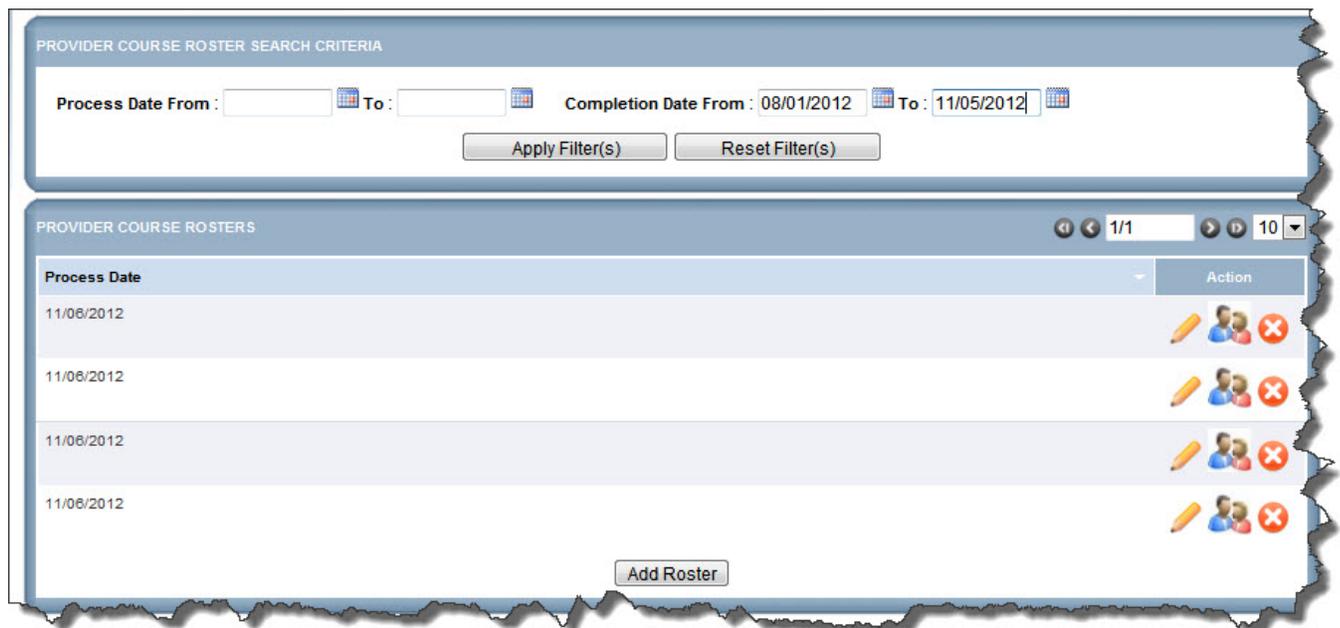
The Provider Course Detail section lists the Provider Course ID for the selected course schedule and the Course Name. These are not editable fields.



Provider Course Roster Search Criteria

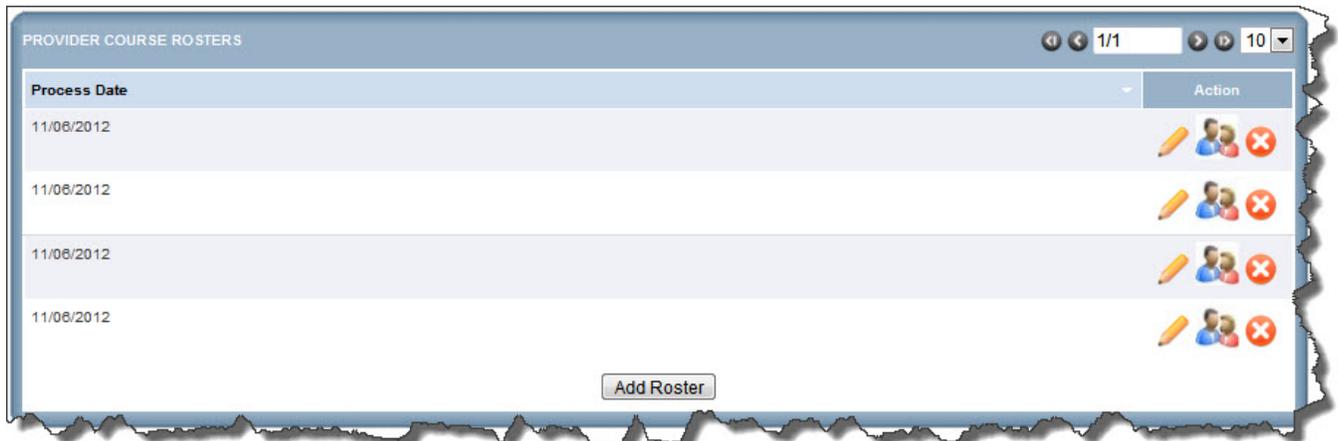
The Provider Course roster Search Criteria provides a mechanism to search for a specific roster by process date range or completion date range.

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.



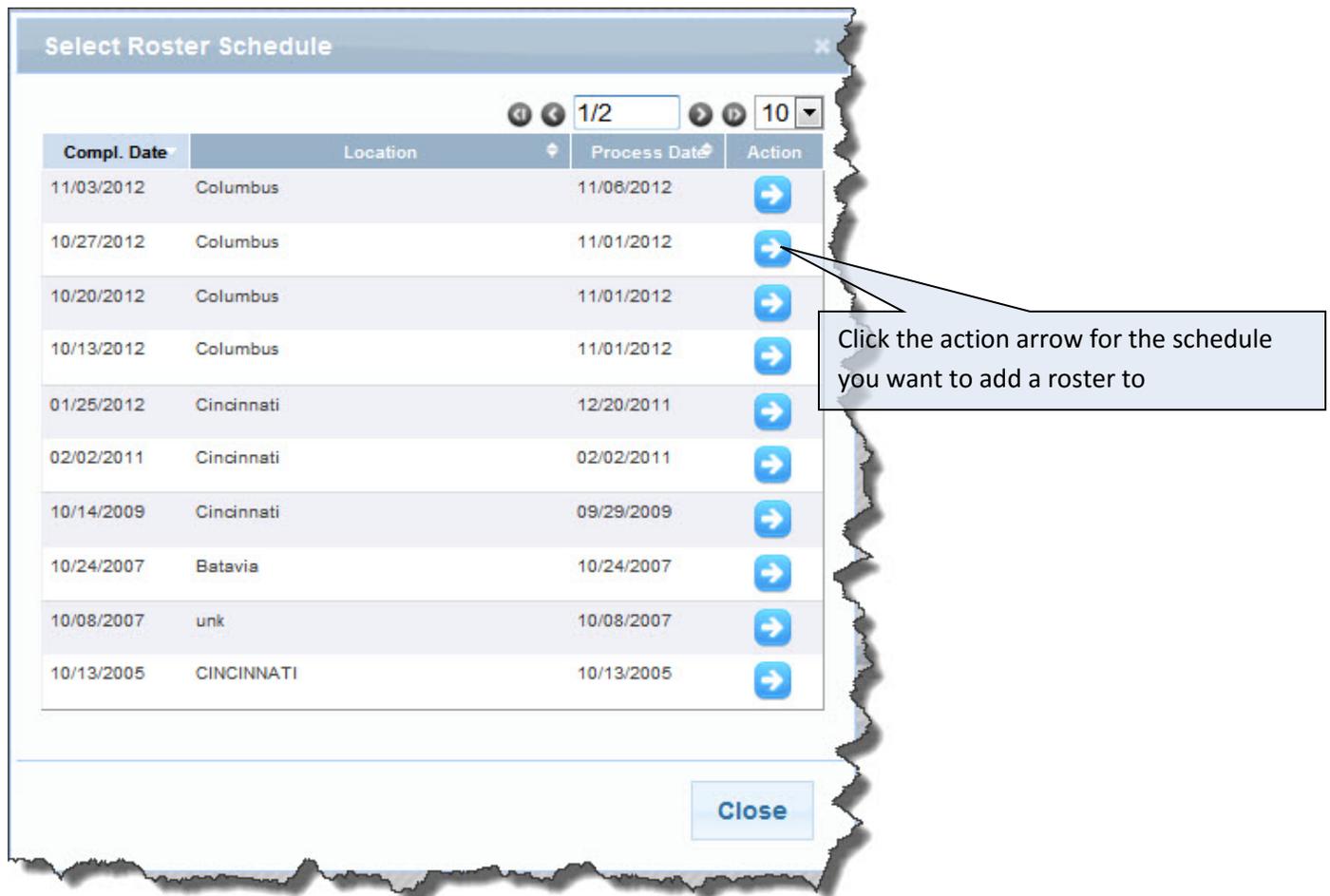
Provider Courses Rosters Page Legend

	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



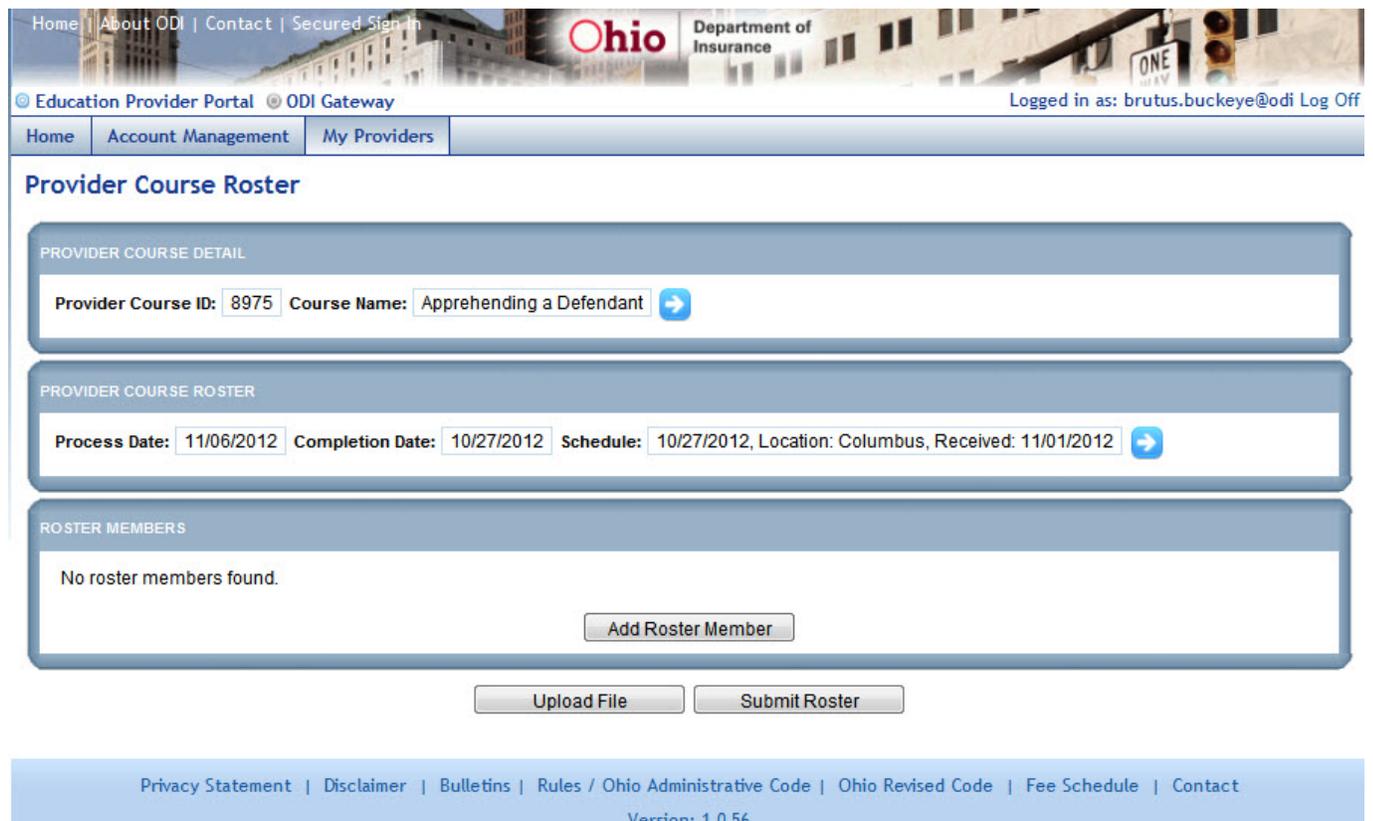
When you click **Add Roster** ODIIS displays the Select Roster Schedule popup window.



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.

The screenshot shows the Ohio Department of Insurance Education Provider Portal. The page title is "Provider Course Roster". It features three main sections:

- PROVIDER COURSE DETAIL:** Contains fields for "Provider Course ID: 8975" and "Course Name: Apprehending a Defendant". A blue arrow button is located to the right of the course name field.
- PROVIDER COURSE ROSTER:** Contains fields for "Process Date: 11/06/2012", "Completion Date: 10/27/2012", "Schedule: 10/27/2012", "Location: Columbus", and "Received: 11/01/2012". A blue arrow button is located to the right of the received date field.
- ROSTER MEMBERS:** Displays the message "No roster members found." and includes an "Add Roster Member" button.

At the bottom of the main content area, there are two buttons: "Upload File" and "Submit Roster". The footer contains links for "Privacy Statement", "Disclaimer", "Bulletins", "Rules / Ohio Administrative Code", "Ohio Revised Code", "Fee Schedule", and "Contact", along with the version number "Version: 1.0.56".

Provider Course Roster Page Legend

	Displays the Roster Member search window
	Displays a search window in which to add the file to upload
	Submits the selected roster file

Entering Individual Roster Members

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

Home | About ODI | Contact | Secured Sign In

Ohio Department of Insurance

Education Provider Portal | ODI Gateway

Logged in as: brutus.buckeye@odi Log Off

Home | Account Management | My Providers

Provider Course Roster

PROVIDER COURSE DETAIL

Provider Course ID: 8975 Course Name: Apprehending a Defendant →

PROVIDER COURSE ROSTER

Process Date: 11/06/2012 Completion Date: 10/27/2012 Schedule: 10/27/2012, Location: Columbus, Received: 11/01/2012 →

ROSTER MEMBERS

No roster members found.

Add Roster Member

Click to add a single individual to a roster

Upload File Submit Roster

Privacy Statement | Disclaimer | Bulletins | Rules / Ohio Administrative Code | Ohio Revised Code | Fee Schedule | Contact

Version: 1.0.56

When **Add Roster Member** is clicked, ODIIS displays the “Associate individual to Roster” search window.

The screenshot shows a dialog box titled "Associate Individual to Roster" with a close button (X) in the top right corner. The dialog is divided into two main sections. The first section, titled "FIND INDIVIDUAL", contains four input fields: "NPN #:" with the value "2776790", "Last Name:" with the value "Carson", "First Name:" with the value "Andrew", and "Middle Name:". Below these fields is a "Find Individual" button. The second section, titled "MATCHING INDIVIDUALS", contains the text "No individuals found." A callout box with a pointer to the "Find Individual" button contains the text "Enter the NPN or name and click here". A "Close" button is located in the bottom right corner of the dialog.

When **Find Individual** is clicked, ODIIS searches for a match. All matching names/NPN's are listed in the search results section.

The screenshot shows a window titled "Associate Individual to Roster" with a search form and a results table. The search form includes fields for NPN #, Last Name (Carson), First Name (Andrew), and Middle Name, with a "Find Individual" button. The results table, titled "MATCHING INDIVIDUALS", shows two entries: Andrew J Carson and Andrew Scott Carson. Callouts point to the "Instructor" checkbox, the "Credits" field, and the "Action" button for the second entry.

Name	Instructor	Credits	NPN	Birth Date	Home State	Action
ANDREW J CARSON	<input type="checkbox"/>	7	2778790	12/11/1970	OH	
ANDREW SCOTT CARSON	<input checked="" type="checkbox"/>	7	16388797	03/03/1986	OH	

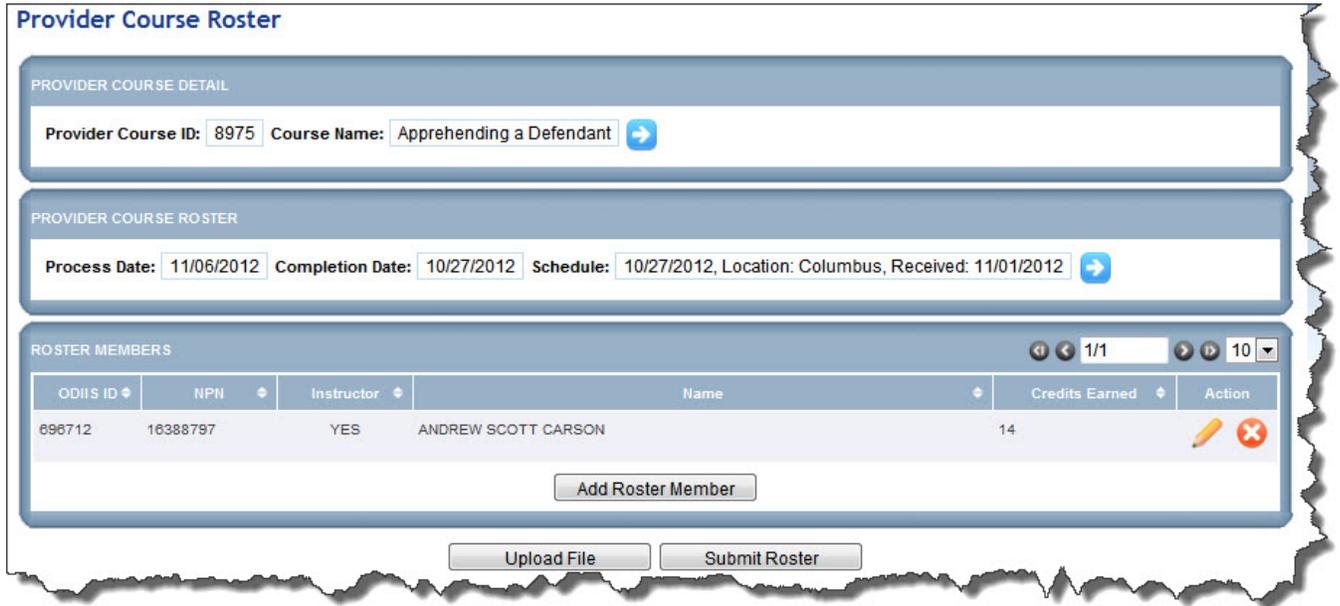
Callout 1: Check to indicate the individual was an instructor for the course (points to the checked checkbox in the second row).

Callout 2: Edit credit hours earned (points to the "7" in the Credits column of the second row).

Callout 3: Click to select the individual you want to add to a roster (points to the blue arrow action button in the second row).

Managing a Provider Course Roster

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

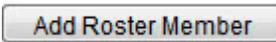
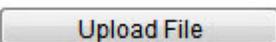
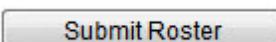


The screenshot shows the 'Provider Course Roster' interface. It is divided into three main sections:

- PROVIDER COURSE DETAIL:** Shows 'Provider Course ID: 8975' and 'Course Name: Apprehending a Defendant' with a search icon.
- PROVIDER COURSE ROSTER:** Shows 'Process Date: 11/06/2012', 'Completion Date: 10/27/2012', 'Schedule: 10/27/2012', 'Location: Columbus', and 'Received: 11/01/2012' with a search icon.
- ROSTER MEMBERS:** A table with columns: ODIIS ID, NPN, Instructor, Name, Credits Earned, and Action. It contains one entry for Andrew Scott Carson with 14 credits earned. Below the table is an 'Add Roster Member' button.

At the bottom of the interface are two buttons: 'Upload File' and 'Submit Roster'.

Provider Course Roster Page Legend

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

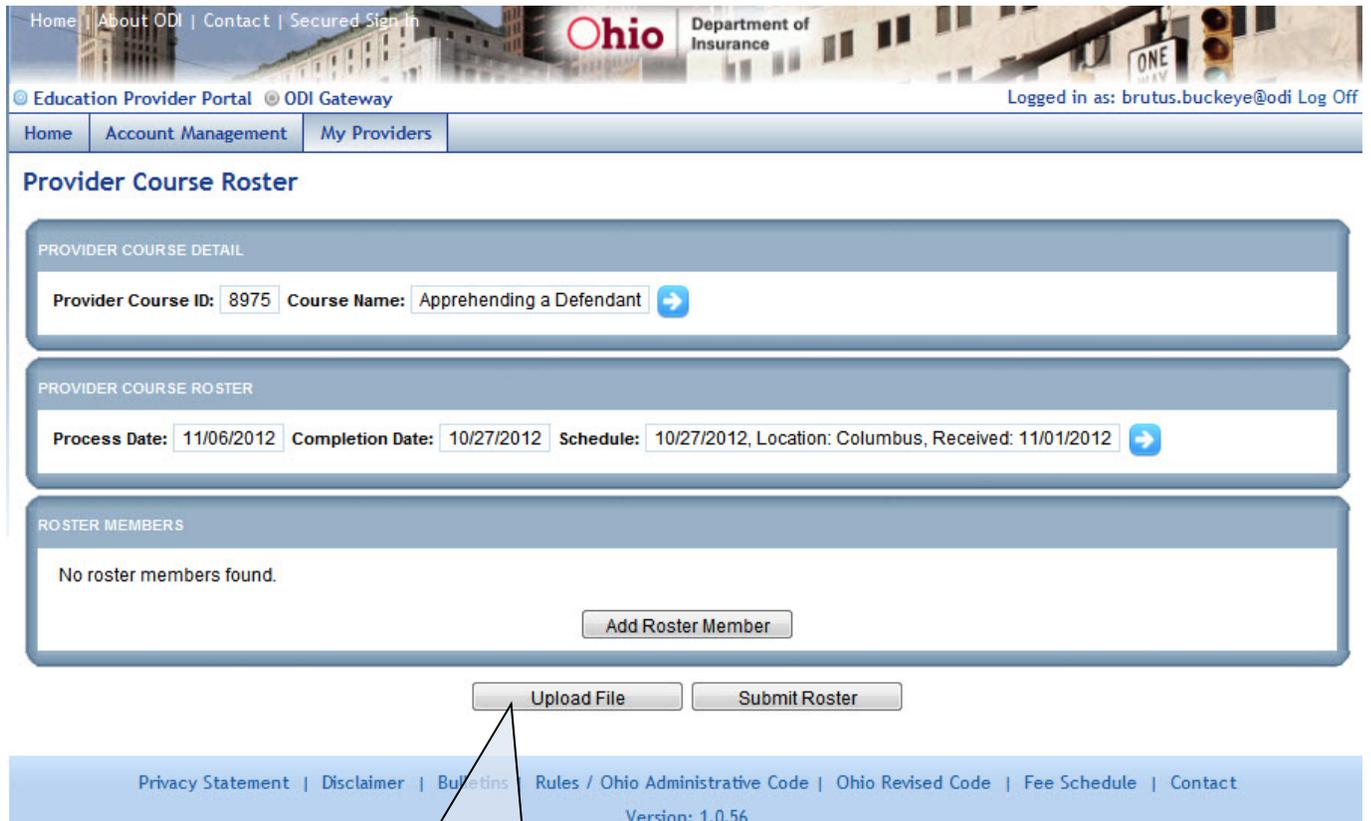
A roster file must adhere to the following guidelines:

- 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

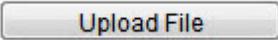
	A	B	C	D	E
1	First Name	Last Name	NPN	Instructor	Credit Hours
2	Carl	Koltas	1421541	0	3
3	Steven	Smiley	2775719	0	3
4	Stacia	Mccall	171301	0	3

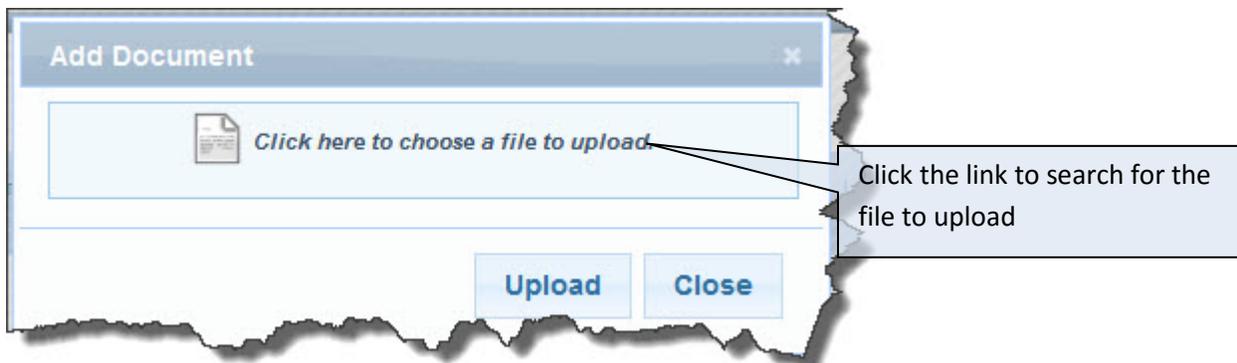
Uploading a Roster File

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

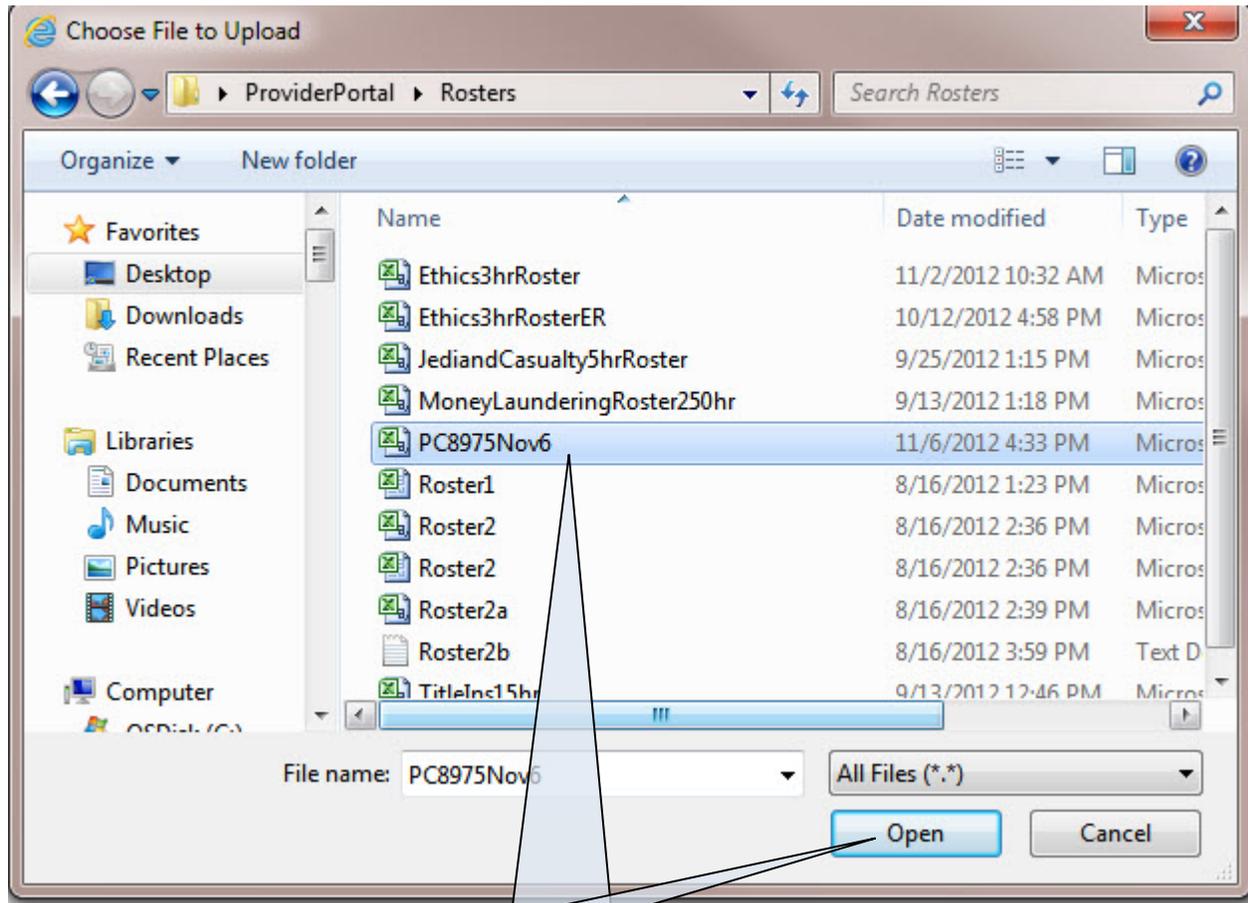


Click to upload a roster file

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



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



ODIIS 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.

Provider Course Roster

PROVIDER COURSE DETAIL
 Provider Course ID: 8975 Course Name: Apprehending a Defendant

PROVIDER COURSE ROSTER
 Process Date: 11/06/2012 Completion Date: 10/20/2012 Schedule: 10/20/2012, Location: Columbus, Received: 11/01/2012

ROSTER MEMBERS

ODIIS ID	NPN	Instructor	Name	Credits Earned	Action
896180	16395408	NO	DANIEL J CONNOR	7	
690061	16293687	NO		7	
611350	16153883	NO		7	
548501	10914313	NO		7	
237180	2776791	NO		7	
136044	16274816	NO		7	

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

Upload **Close**

Upload File Submit Roster

Click to view the import errors

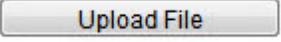
Click to close the popup



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.

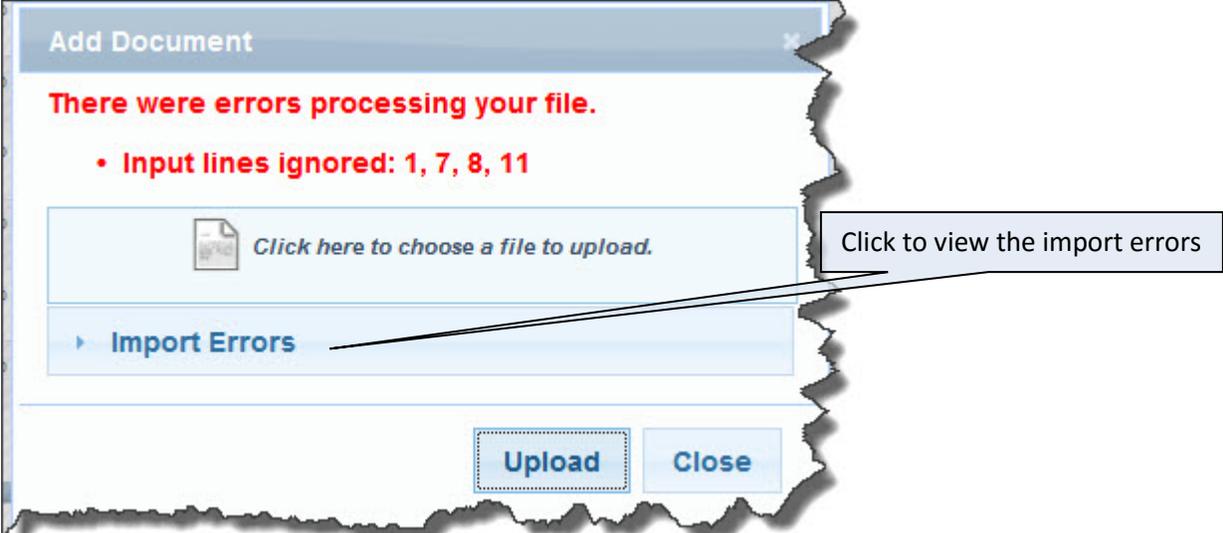
- To add additional individuals to a submitted roster, submit a new roster (individually or as an entire roster) for the same course and date.
- To delete credits from a submitted roster, send an email containing the name, NPN, and course ID to the Department at educprovider@insurance.ohio.gov.

Provider Course Roster Page Legend

	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
	Displays a search window in which to add the file to upload
	Submits the selected roster file

Roster Error Messages

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



Add Document

There were errors processing your file.

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

 [Click here to choose a file to upload.](#)

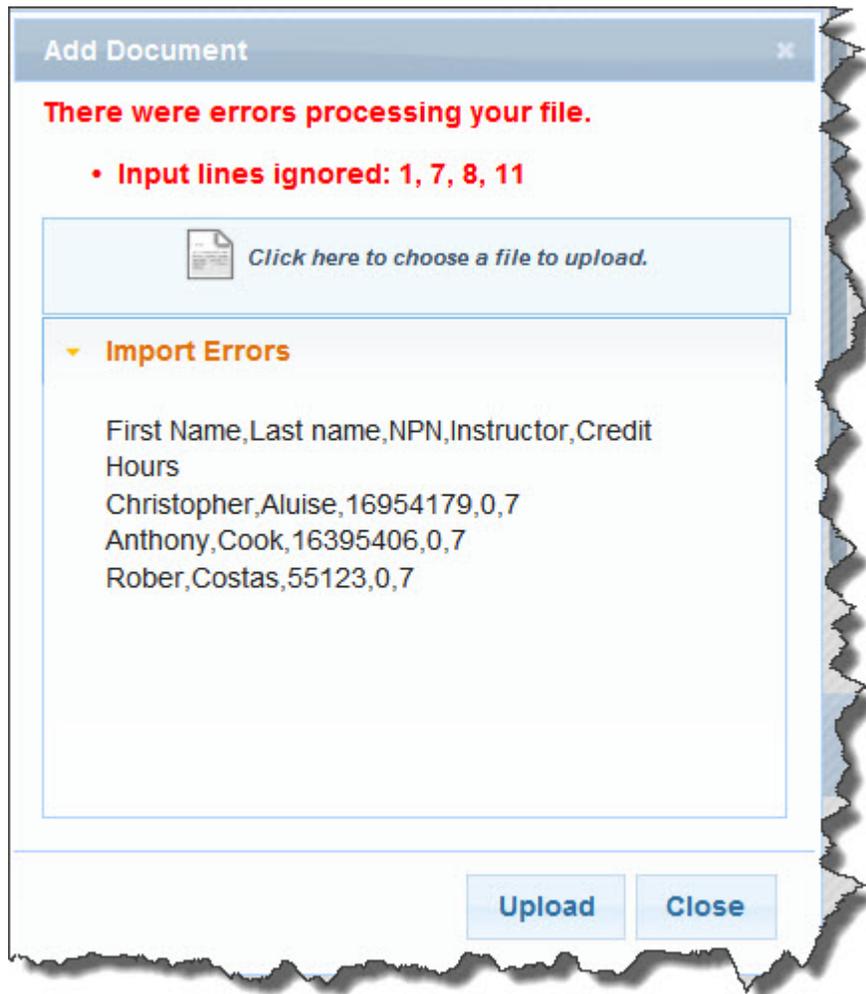
[▶ Import Errors](#)

Upload **Close**

Click to view the import errors

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:

Row 1:	The header row of the file. This does not prevent the roster from being uploaded, however, this row was “ignored” during the upload process
Rows 7, 8 and 11:	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)



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.

Provider Course Roster

PROVIDER COURSE DETAIL
 Provider Course ID: 8975 Course Name: Apprehending a Defendant

PROVIDER COURSE ROSTER
 Process Date: 11/06/2012 Completion Date: 10/27/2012 Schedule: 10/27/2012, Location: Columbus, Received: 11/01/2012

ROSTER MEMBERS 1/1 10

ODIIS ID	NPI	Instructor	Name	Credits Earned	Action
594365	15751325	NO	JOLYNNE KELTY	4	
297987	1730507	NO	WILLIAM H HOPPLE	3	
149354	1737717	NO	HOWARD H HEROLD	4	
132212	2775719	NO	STEVEN M SMILEY	3	
69280	1421541	NO	CARL S KOLTAS	3	
141376	1713016	NO	PATRICIA MATTHEWS MCCALL	3	

Buttons: Upload File, Submit Roster

Callout: Click to submit the roster

When you click **Submit Roster** ODIIS checks to make sure this is what you want to do:

Please Confirm

Are you sure you want to submit this roster?

Buttons: Yes, No

Callout: Click to submit the roster

Once the roster is submitted, edit and delete options are no longer available.

Home | About ODI | Contact | Secured Sign In

Ohio Department of Insurance

Education Provider Portal | ODI Gateway

Logged in as: brutus.buckeye@odi Log Off

Home | Account Management | My Providers

Provider Course Roster

PROVIDER COURSE DETAIL

Provider Course ID: 8975 Course Name: Apprehending a Defendant

PROVIDER COURSE ROSTER

Process Date: 11/06/2012 Completion Date: 10/27/2012 Schedule: 10/27/2012, Location: Columbus, Received: 11/01/2012

ROSTER MEMBERS

ODIIS ID	NPN	Instructor	Name	Credits Earned	Action
141376	1713018	NO	PATRICIA MATTHEWS MCCALL	3	
69280	1421541	NO	CARL S KOLTAS	3	
132212	2775719	NO	STEVEN M SMILEY	3	
149354	1737717	NO	HOWARD H HEROLD	4	
297987	1730507	NO	WILLIAM H HOPPLE	3	
594365	15751325	NO	JOLYNNE KELTY	4	

View Confirmation

Privacy Statement | Disclaimer | Bulletins | Rules / Ohio Administrative Code | Ohio Revised Code | Fee Schedule | Contact

Version: 1.0.56

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

Apprehending a Defendant

8975	7 Credit(s)	100 Park Place Blvd.
11/01/2012 08:00:00 AM to 10/27/2012		Columbus, OH 43214

Individual	NPN	Credit(s)
CARL S KOLTAS	1421541	3
STEVEN M SMILEY	2775719	3
PATRICIA MATTHEWS MCCALL	1713016	3
HOWARD H HEROLD	1737717	4
WILLIAM H HOPPLE	1730507	3
JOLYNNE KELTY	15751325	4

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.

Individual	NPN	Credit(s)
The enclosed roster contains the following: Total number of student records : <u>6</u> Total Fee \$ <u>42</u>		

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.

The screenshot shows the 'Application Gateway' login page for the Ohio Department of Insurance. The page includes a header with the ODI logo and navigation links, and a main content area with a login form. Three callout boxes provide instructions: 'Provider Official: enter User Name' points to the 'User name' field; 'Enter your Password' points to the 'Password' field; and 'Click the Sign In button' points to the 'Sign In' button. The 'Create an account' button is also visible and highlighted with a red box.

Home | About ODI | Contact | Secured Sign In

Ohio.gov State Agencies | Online Services

Application Gateway

Welcome to the Ohio Department of Insurance Application Gateway!

User name
[Can't remember your user name?](#)

Password
[Can't remember, or need to reset, your password?](#)

[Sign In](#) [Create an account](#)

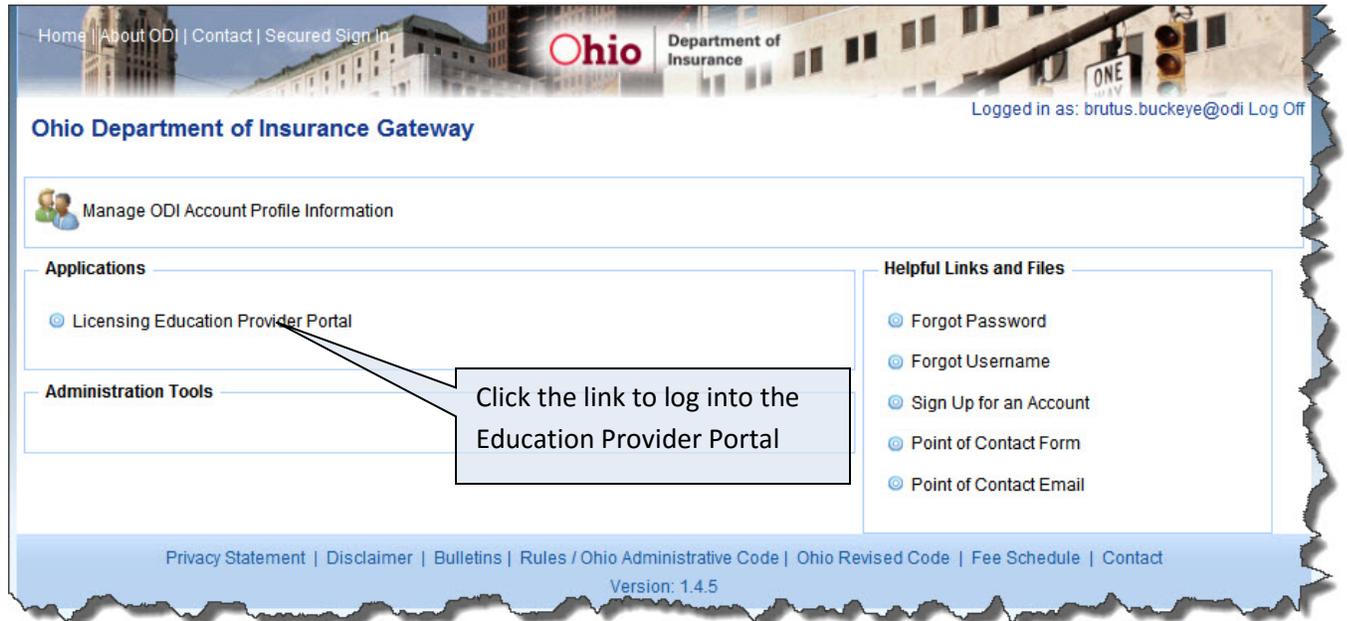
Still having issues? Additional help is available here.

Provider Official: enter User Name

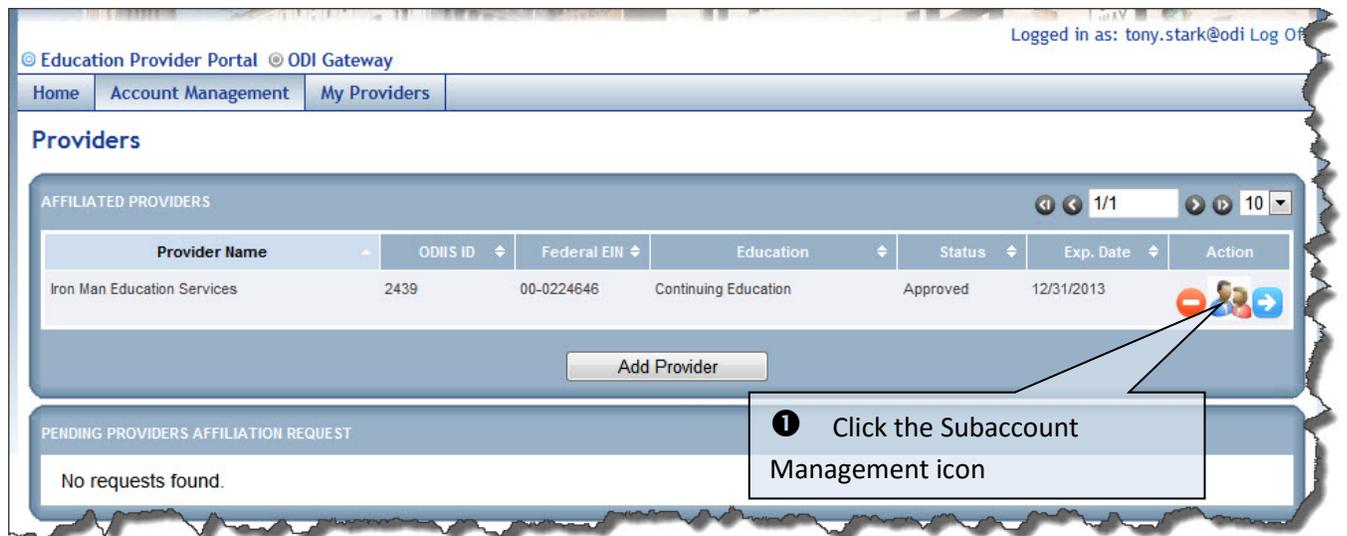
Enter your Password

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:



2 Enter the name matching the Gateway account

3 Click the "Add Sub-Account button"

Add Provider Sub-Account

ODIIS ID: 2439 Federal EIN: 00-0224646 Name: Iron Man Education Services Education Type: Continuing Education

ADD ACCOUNT

Harold.Hogan@odi Add Sub-Account

PROVIDER ACCOUNTS

User Name	Full Name	Action
Pepper.Pots@odi	Pepper Pots	

Close

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:

Add Provider Sub-Account

ODIIS ID: 2439 Federal EIN: 00-0224646 Name: Iron Man Education Services Education Type: Continuing Education

ADD ACCOUNT

Add Sub-Account

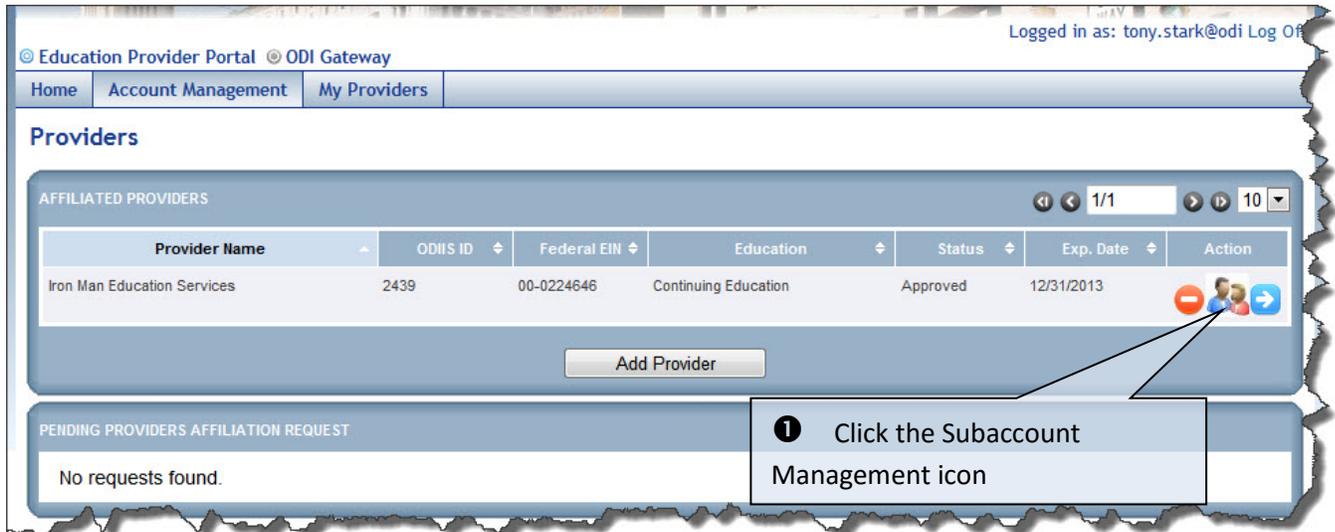
PROVIDER ACCOUNTS 1/1 10

User Name	Full Name	Action
Harold.Hogan@odi	Harold Hogan	
Pepper.Pots@odi	Pepper Pots	

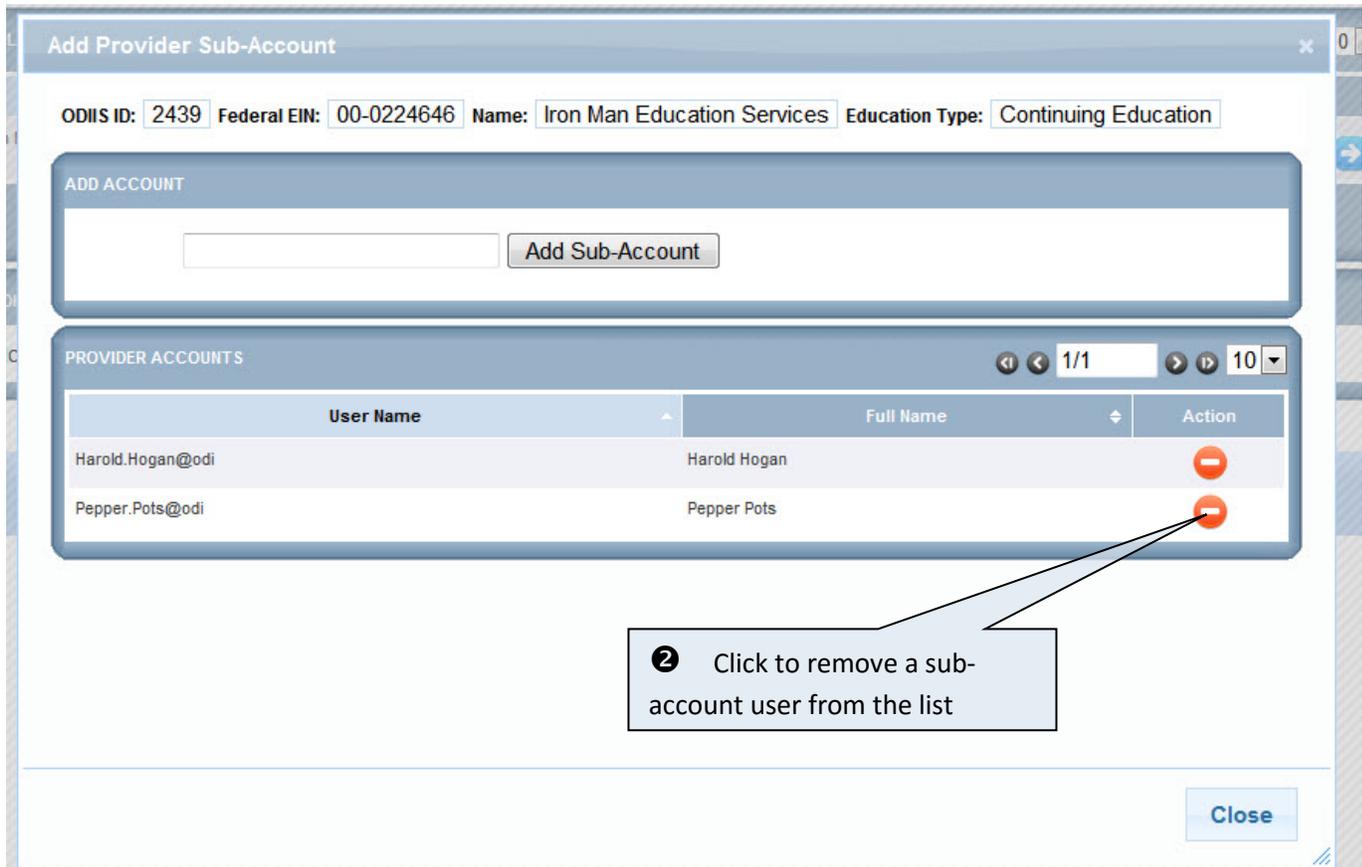
Close

Deleting Sub-Account Users

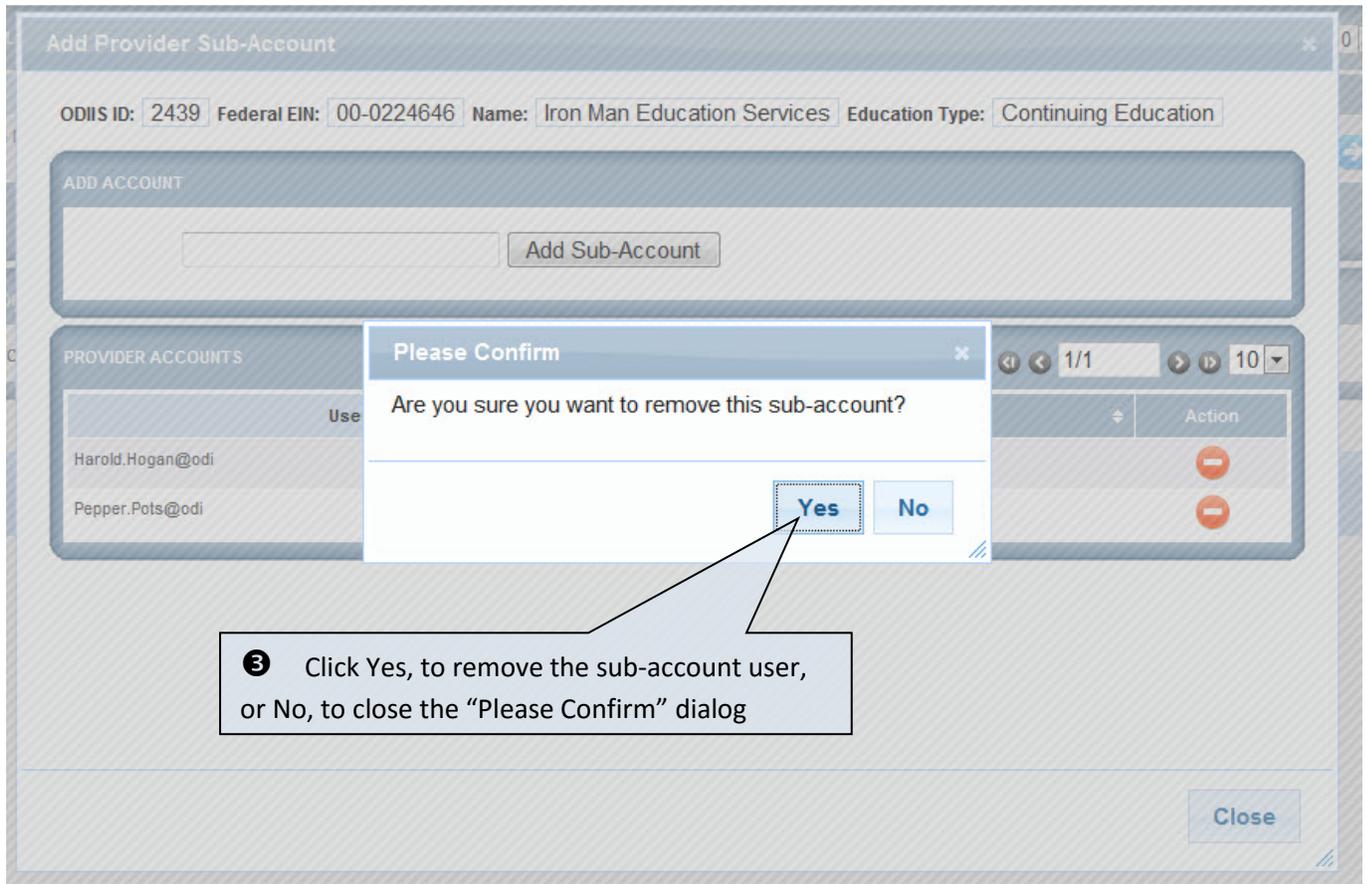
You may remove a sub-account user from the Provider Accounts list by clicking the “Remove Provider User Access” icon.



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

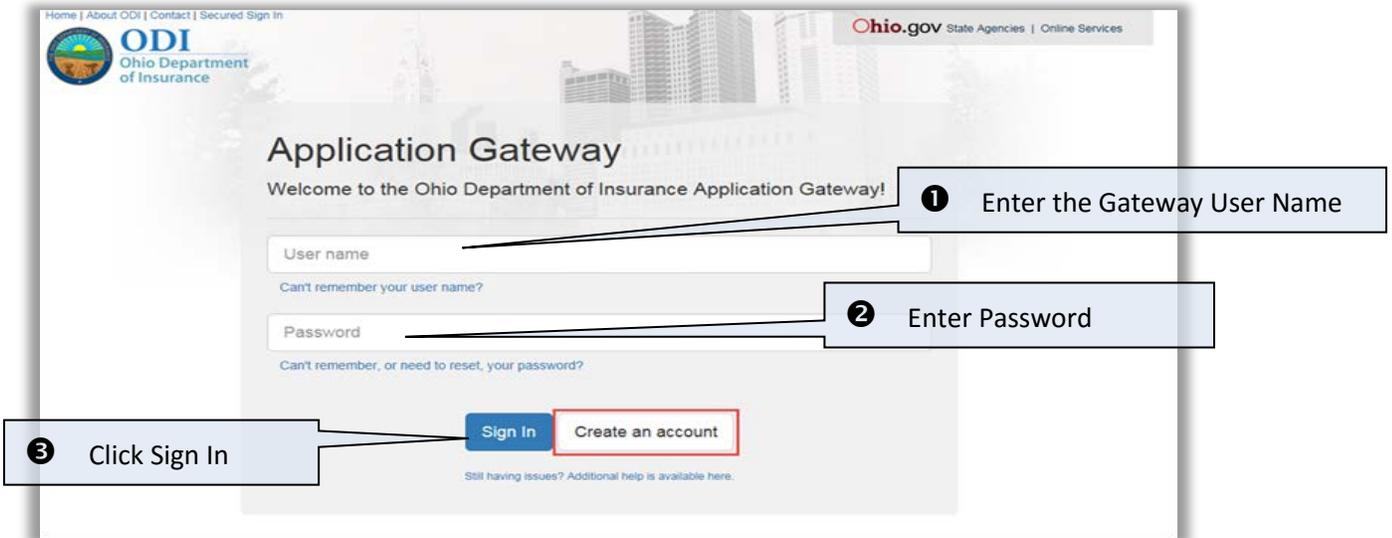


When the “Remove Provider User Access” icon is clicked, a “Please Confirm” dialog window is displayed:

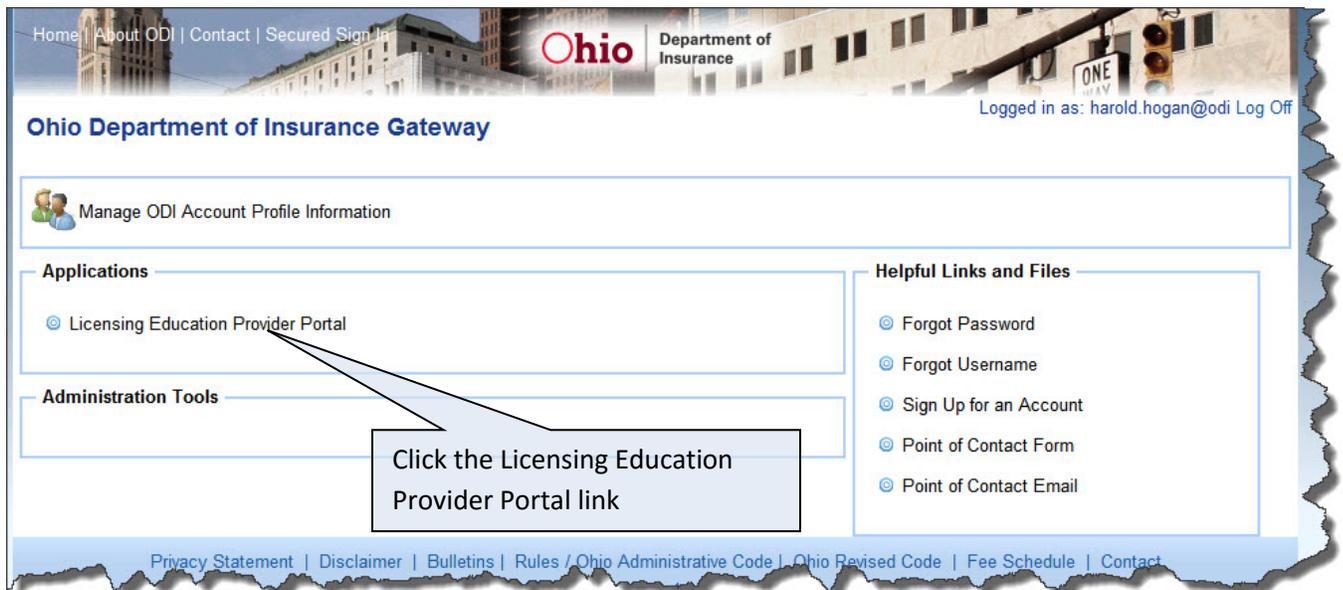


3 Click Yes, to remove the sub-account user, or No, to close the “Please Confirm” dialog

Logging in as a Sub-Account User



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



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.

Home | About ODI | Contact | Secured Sign In

Ohio Department of Insurance

Logged in as: harold.hogan@odi Log Off

Education Provider Portal | ODI Gateway

Home | Account Management | My Providers

My Providers

AFFILIATED PROVIDERS

Provider Name	Prov. ID	Federal EIN	Education	Status	Exp. Date	Action
Iron Man Education Services	2439	00-0224646	Continuing Education	Active	12/31/2013	

Privacy Statement | Disclaimer | Bulletins | Rules / Ohio Administrative Code | Ohio Revised Code | Fees Schedule | Contact

Version: 1.0.61

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 Gateway location: <https://gateway.insurance.ohio.gov>
2. Open a browser and log in as you normally would. The screen should look like Figure 1 below. Click the link as shown in Figure 1. (Note: the red outlines will not appear on your screen.)

Ohio Department of Insurance Gateway

Account Management

- Manage ODI account profile information
- Request access to additional applications**

Applications

- Agent Health Insurance Exchange Registration
- Learning Management System
- Licensing Education Provider Portal
- ODIIS - Licensing CEProvider

Helpful Links and Files

- Forgot Password
- Forgot Username
- Request Application Access**
- Sign Up for an Account

Click either of these links to start the request process

3. Find application titled "Fiscal EPAY", check it (Shown highlighted in yellow) and click continue button.

Request Additional Access

Please select the area you would like to access.

Some applications may not show up right away because they require that your company point of contact verify your employment before access can be granted. Once this process complete, the application will show up in your menu.

BUSINESS AREA AND/OR APPLICATION SELECTION	
<input type="checkbox"/>	Annual Title Agent/Agency Review Online submission of the Annual Title Review form for licensed Title Agents & Agencies.
<input type="checkbox"/>	Captive Insurance - File Upload Used for Captive Insurance companies to upload files.
<input checked="" type="checkbox"/>	Fiscal Epay The application used to pay invoices sent by the Ohio Department of Insurance.
<input type="checkbox"/>	Licensing CE This application is strictly limited to Prometric.
<input checked="" type="checkbox"/>	Missing Life Policy Search The Ohio Department of Insurance's missing life insurance policy search service assists Ohio residents, and the families of deceased Ohio residents, in locating lost insurance policies that were purchased in the state. This application is to be used by insurance companies selling business in Ohio to aid in the search and discovery of these lost insurance policies.
<input checked="" type="checkbox"/>	OSHIIP The Ohio Senior Health Insurance Information Program (OSHIIP) provides free health insurance information and services to Medicare beneficiaries and the people that care for them. OSHIIP offers a toll-free hotline, 1-800-686-1578, free publications, a speakers bureau and training for volunteers.
<input type="checkbox"/>	QA Business Area Test QA Business Area Test
<input type="checkbox"/>	RiskExam Risk assessment exam file uploads. This application is to only be used by insurance companies needing to upload files in support of examinations conducted by ODI.

Step 1: Select one or more applications

Continue

Step 2: Click the Continue button

- An additional information box will appear. Enter information that would be helpful for ODI when evaluating access approval. Click the save button to submit your request.
- The below figure shows the message you will receive after submitting your request. Any accounts that do not need additional approval will be in your list of applications after you log in. You should receive an approval or denial within forty-eight (48) hours for any application request requiring additional approval. Click the OK button.



- After ODI reviews your application access request you will receive an email indicating approval or denial of your request.
- All applications you have been granted access to will show under “Applications” on your account.
- 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.
- Once the invoice list is displayed, click on the blue magnifying glass to view that invoice.
- 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.

Addendum B: Resetting an ODI Gateway Account Username

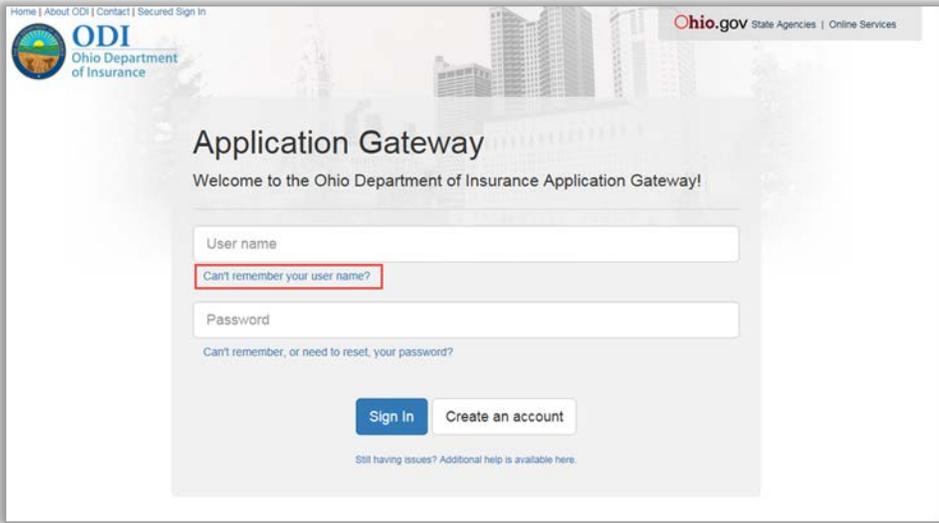
Note: This process applies to accounts that use the ODI Gateway to access applications. Gateway location: <https://gateway.insurance.ohio.gov>

Step 1: Open a browser and navigate to the Gateway location. The screen should look like Figure 1 below.

Step 2: Using your mouse, click on the link to recover your username; located in Figure 1 by the red outline.

Note: The red outlines will not appear on your screen.

Figure 1:



Home | About ODI | Contact | Secured Sign In

ODI
Ohio Department
of Insurance

Ohio.gov State Agencies | Online Services

Application Gateway

Welcome to the Ohio Department of Insurance Application Gateway!

User name

Can't remember your user name?

Password

Can't remember, or need to reset, your password?

Sign in Create an account

Still having issues? Additional help is available here.

Step 3: The screen in Figure 2 will allow you to select from a few options. Select the option to recover your username (it should already be selected for you). Follow the steps as defined in Figure 2.

Figure 2:

The screenshot shows the ODI Account Access page. At the top, there are navigation links: Home | About ODI | Contact | Secured Sign In. The ODI logo and name are on the left, and Ohio.gov State Agencies | Online Services is on the right. Below the header, there is a message: "We apologize for any inconvenience you're experiencing by not being able to access your account. To resolve this issue as quickly as possible, please select an option below." Under "ACCOUNT MANAGEMENT OPTIONS", three options are listed: "Reset my account password", "Recover my account's user name" (which is preselected), and "Report another error or problem". A green callout box points to the "Recover my account's user name" option with the text: "1. Select 'Reset my account's user name' option. (This is preselected for you.)". Below this is the "ACCOUNT MANAGEMENT" section titled "Recover account user name". It says: "Please provide the email address that is associated with your account. We will email your user name to this address within a few minutes." There is an "Email address" input field containing "saap.test@insurance.ohio.gov". A green callout box points to this field with the text: "2. Enter the email address associated with your account." To the right of the input field is a "Recover user name" button and a "Cancel" button. A green callout box points to the "Recover user name" button with the text: "3. Click the 'Continue' button."

Step 4: Verify you are a human by entering the letters and/or numbers from the image, then click to continue. (See Figure 3.)

Figure 3:

The screenshot shows a dialog box titled "Updating password". Inside, there is a "User validation" section with the text: "Please enter the letters and number from the image below." Below this is a CAPTCHA image showing the characters "4UYJF". A green callout box points to the CAPTCHA image with the text: "1. Enter the letters and/or numbers displayed above to verify you are human." Below the CAPTCHA image is an input field containing "4UYJF" and a "Click here to change the image" link. A green callout box points to the input field with the text: "2. Click the 'Continue' button." To the right of the input field are "Continue" and "Cancel" buttons. The "Continue" button has a checkmark icon.

Finished! Your username has been emailed to you. You can click the login link to log into the ODI Gateway!

Contact: If you need further assistance, please contact GatewayAdmin@insurance.ohio.gov

Addendum C: Resetting an ODI Gateway Account Password

ODI will requires a password change every ninety (90) days.

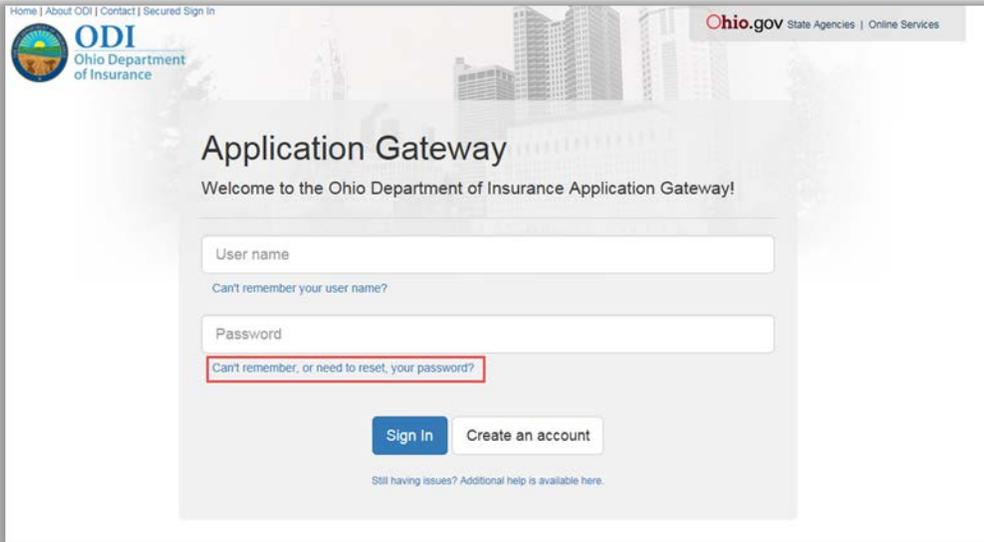
Gateway location: <https://gateway.insurance.ohio.gov>

Step 1: Open a browser and navigate to the Gateway location. The screen should look like Figure 1 below.

Step 2: Using your mouse, click on the link to reset your password; located in Figure 1 by the red outline.

Note: The red outlines will not appear on your screen.

Figure 1:



Home | About ODI | Contact | Secured Sign In

Ohio.gov State Agencies | Online Services

ODI
Ohio Department
of Insurance

Application Gateway

Welcome to the Ohio Department of Insurance Application Gateway!

User name

Can't remember your user name?

Password

Can't remember, or need to reset, your password?

Sign In Create an account

Still having issues? Additional help is available here.

Step 3: The screen in Figure 2 will allow you to select from a few options. Select the option to reset your password (it should already be selected for you). Follow the steps as defined in Figure 2.

Figure 2:



Step 4: Verify you are a human by entering the letters and/or numbers from the image, then click to continue. (See Figure 3.)

Figure 3:



Step 5a: Enter the answer to the security question that is displayed in Figure 4. If you provided multiple security questions when you set up your account, you can click the link that is displayed to change the question that needs to be answered. (If you only have one question specified, you will be given the option to add more the next time you log in.)

Figure 4:

ACCOUNT MANAGEMENT OPTIONS

- Reset my account password
- Recover my account's user name
- Report another error or problem

ACCOUNT MANAGEMENT

Reset password
Please provide the new password you would like to use. Please note that the new password cannot be any password you have previously used.

In what city or town were you born in? Answer a different question

Columbus

New Password

Confirm Password

Update Password Cancel

Option: If you have multiple security questions set up, change the question to be answered by clicking this link.

1. Enter the answer to the security question above.

Step 5b: Enter the new password. As you meet the listed criteria, the icon will change to a checkmark to show that portion has been met (as shown in Figure 5). Please note that the only special characters allowed are listed – and you **MUST** include one in your password.

Figure 5:

ACCOUNT MANAGEMENT

Reset password
Please provide the new password you would like to use. Please note that the new password cannot be any password you have previously used.

1. Enter your new password - meeting the criteria to the right.

In what city or town were you born in? Answer a different question

Columbus

New Password

Confirm Password

Update Password Cancel

Password requirements

- ✗ At least eight characters in length
- ✓ Contains at least one lowercase letter
- ✓ Contains at least one uppercase letter
- ✗ Contains at least one number
- ✓ Contains at least one special character (\$, %, *, +, -, ., /, !)

New Password Criteria: This list specifies the requirements your password must meet. Unmet criteria are defined with a ✗. Criteria that have been met are defined with a ✓.

Step 5b, cont.: Similarly, when you confirm your password, the message will indicate if you have entered your new password a second time exactly as you did the first. Click the “Update Password” button when finished. See Figure 6 for an example.

Figure 6:

ACCOUNT MANAGEMENT

Reset password
Please provide the new password you would like to use. Please note that the new password **cannot** be any password you have previously used.

In what city or town were you born in? Answer a different question
Columbus

New Password
.....

Confirm Password
.....

Confirm password
✓ Must match your new password

Update Password Cancel

Note: When you type your new password correctly a second time, the icon will change from ✖ to ✓

2. Enter your new password a second time.

3. Click the Update Password button.

Finished! Your password has been changed and you can now click the login link to log into the ODI Gateway!

Figure 7:

ACCOUNT MANAGEMENT OPTIONS

- Reset my account password
- Recover my account's user name
- Report another error or problem

ACCOUNT MANAGEMENT

Your password has been changed to the value you provided.
When you are ready, please [login](#) to the Ohio Department of Insurance Gateway.

Contact: If you need further assistance, please contact GatewayAdmin@insurance.ohio.gov