BRITISH COLUMBIA

CE Self-Tracker – Reference Guide

About this Guide:

The CE Self-Tracker Reference Guide provides step-by-step instructions on how to enter information into the CE Self-Tracker with screenshots **below** each step.

Understanding the CE Self-Tracker

Insurance Council BRITISH COLUMBIA **Completed CE Credits**: 斺 Main Menu Payment Items (0) Logout **Required CE Credits: Remaining CE Credits**: Number of CE credits Home / Instructions Number of CE credits Number CE credits you you've entered into the **Continuing E** required per licence still need to complete tracker. This CE Self Tracker ed CE credit iirements. You ar for five licence periods. Failure to complete (linary action for the licence period. period. Click here for a step-by-step instruction manual on how to use the Self-Tracker. Summary This is a summary of CE credits you have completed and cred s outstanding based on the CE in rmation you have entered into the Self-Thicker Licence Period **Required CE Credits** Completed CE Credits Remaining CE Credits CE Credits available for Carryover 4 June 1, 2021 – May 31, 2022 General Licence 8 4 List Courses you have entered into the CE Self-Tracker is listed below. Click on Edit to view and modify the course information you have entered. Download/export selected ⁽²⁾ Delete selected ⁽²⁾ **CE Credits available for** Licence Period Course Provider Course Name Carryover: Number of CE credits June 1, 2021 - May 31, 2022 General Licence Sample Course Title 1 Sample Course Provider 1 you can allocate as carry over June 1, 2021 – May 31, 2022 General Licence Sample Course Provider 2 Sample Course Title 2 credits to the next licence period. ete Sample Course Provider 3 June 1, 2021 - May 31, 2022 General Licence Sample Course Title 3 2021-07-09 Delete Edit Delete June 1, 2021 – May 31, 2022 General Licence Sample Course Provider 4 Sample Course Title 4 1 2021-07-29

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Entering your CE Information

Step 1: Go to the Online Portal.

To access the Online Portal, go to the Insurance Council of British Columbia website and click on 'Portal Login'.



Step 2: Enter your Login Information.

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Register for an Account Login

Insurance Council of BC Online Portal User Name or E-mail: Password: Our online portal provides access to various Insurance Council of BC services. Currently, users can login to do the following: Login Update contact information

- Register to write the LLQP exam
- Apply for an individual licence
- · Pay fees owing for existing licensees
- Complete annual filing (available when filing is open)



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Step 3: Once you have entered your login information on the Online Portal, you will see a main menu. Under Manage my Continuing Education, click on 'CE Self-Tracker'.

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icences	Exams	Contact Information
Apply for a personal licence	Register/Manage my LLQP exams	Update my portal login information
Complete my annual filing	Confirmation of Online LLQP Exams	Change my password
View my licence record(s)	View my exam confirmation letter	Update my contact information
Manage my applications	View my exam results	
View/Print my receipts	View/Print my receipts	
View/Print my licence certificate	3 Manage my Continuing Education → CE Self-Tracker	

Step 4: Review the details on the CE Self-Tracker and the instructions. Click on 'Proceed to CE Self-Tracker'.

Payment Items (0) Logout

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🔂 Main Menu

Home / CE Self-Tracker Instructions

My Continuing Education Self-Tracker

Insurance Council's CE Self-Tracker will help you calculate how many CE credits you need to complete based on your licence class, and the number of credits you can carry forward to the next licence period. You can enter and track your completed CE through the Self-Tracker.

Inputting your CE credits into the CE Self-Tracker does not meet your recordkeeping requirements. Please ensure you maintain your full CE records for five licence periods as part of your CE recordkeeping requirements.

Instructions:

- 1. To add completed CE courses, Click "Add New" button on the following page.
- 2. Enter course information as listed, such as the Course Provider Name, Course Title, and Number of Credits.
- 3 Click Save
- 4. Course has been saved if you see a green box that indicates "Course saved successfully!".
- 5. Proceed to adding next course, or if you are finished adding courses, you can logout of the Portal.

Note: You may add, delete, or edit courses at anytime before the current licence on May 31st annually.



Questions about the CE Self-Tracker?

A step-by-step instruction manual and Frequently Asked Ouestions about the CE Self-Tracker can be found on our website. You can also call or email our Practice & Ouality Assurance Team at 604-695-2008 or practice@insurancecouncilofbc.com.

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Step 5: Click on 'Add New'.

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分 Main Menu

Home / Instructions / Contacts / CE Self-Tracker

Continuing Education

This CE Self-Tracker helps you track and calculate your completed CE credits. It does **not meet your recordkeeping requirements**. You are still required to maintain your full CE records for five licence periods. Failure to complete CE or to keep CE records can result in disciplinary action.

Payment Items (0) Logout

Summary

Licence Period	Required CE Credits	Completed CE Credits	Remaining CE Credits	CE Credits available for Carryover 🕧	
		1	No courses found.		-
List				5	Add New
Courses you	have entered into the CE Self-Tracker is liste	d below. Click on Edit to view and modify	the course information you have ente	red.	
Download/ex	port selected ① Delete selected ①				
				Ent	ter keyword to filter list
🗌 Li	cence Period Course Provide	er Course Name	Completed CE Credits	Completion Date	Action
		١	No courses found.		

Step 6: Enter the course information (A-J below).

Be sure to fill out all required fields and click Save. Use the grade symbol to see additional instructions or examples on each field.

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Licence Period Required G Course Title: • Category: ① • Category: ① • Category: ① • Category: ① • Category: ① • Category: ① • Category: ① • Category: ① • Category: ① • Category: ①	Summary	• Course Provider:	* Course Provider Name:		
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		* Completion Date: ①	* Delivery Method:		
Save		mm/dd/2021		J	
			Save	Cancel	

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Step 7: Your course will be saved. Find the course name under 'List' to verify that it has been saved successfully.

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合 Main Menu

Home / Instructions / Contacts / CE Self-Tracker						
Continuing Education						
	Course	e 'Sample Course Title 4'	saved successfully!			
This CE Self Tracker helps you track and calculate you Failure to complete CE or to keep CE records can resul		ot meet your recordkeep	r ing requirements . You	are still required to main	tain your full CE records for five licen	ce periods.
Click here for a step-by-step instruction manual on ho	w to use the Self-Tracker.					
Summary						
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Licence Period	Required CE Credits	Completed CE Credits	Remaining C		Credits available for Carryover 🕧	
June 1, 2021 – May 31, 2022 General Licence	8	4	4	0		
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Download/export selected 🕐 Delete selected 🕐						
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June 1, 2021 – May 31, 2022 General Licence	Sample Course Pro	vider 1 Sar	mple Course Title 1	1	2021-08-03	Edit Delete
June 1, 2021 – May 31, 2022 General Licence	Sample Course Pro	vider 2 Sar	mple Course Title 2	1	2021-07-15	Edit Delete
June 1, 2021 – May 31, 2022 General Licence	Sample Course Pro	vider 3 Sar	mple Course Title 3	1	2021-07-09	Edit Delete

Payment Items (0) Logout

To add additional CE credits, repeat steps 1-6.

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Editing/Deleting Entries

You have the option to edit or delete entries at any time before the licence period ends (June 1st – May 31st annually).

Step 1: To Edit or Delete individual entries, click on 'Edit' or 'Delete'.

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សា	Main Menu				Payment Items (0) Logout
Home	/ Instructions / Contacts / CE Self-Tracker				
Cor	tinuing Education				
	E Self Tracker helps you track and calculate your co e to complete CE or to keep CE records can result in		your recordkeeping requiremer	nts. You are still required to mainta	ain your full CE records for five licence periods.
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	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 2	Sample Course Title 2	1	2021-07-15 Edit Delete
	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 3	Sample Course Title 3	1	2021-07-09 Edit Delete
	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 4	Sample Course Title 4	1	2021-07-29 Edit Delete

Step 2: To delete more than one entry at once, select the entries you would like to delete and click 'Delete selected'.

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Hom	e / Instructions / Contacts / <u>CE Self-Tracker</u>					
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Exporting your CE Information

Step 1: Select the entries you would like to export into an Excel spreadsheet.

分 Main Menu					Paymer	nt Items (0) Logo
Home / Instructions / Contacts / CE Self-Tracker						
Continuing Education						
This CE Self-Tracker helps you track and calculate Failure to complete CE or to keep CE records can	2 I I I I I I I I I I I I I I I I I I I	not meet your recordkeeping I	equirements . You ar	e still required to maintain y	our full CE records for five lic	ence periods.
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Step 2: Click 'Download/export selected'.

ፊ	Main Menu					Paymen	it Items (0) Log
Hom	e / Instructions / Contacts / CE Self-Tracker						
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Step 3: Go to 'Downloads' on your computer to open the excel document.