

## Utah Real Estate

Continuing Education Provider Guide for Clarus

May 2022 Stock #094500 v0522

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## Login for First Time

When logging in for the first time, access the system at: <u>https://utdre.useclarus.com/</u>. This link opens the login page:

	Language +
Please log in	
Username: Password: Login	
Forgot your password? Reset it here. If you've having technical problems, please email: ce_providers@ between SAM-GPM ET M-F	gpearson com or call 1-800-274-4577

Then follow the steps in the **Forgot Password** section of this document. Your Username is your Utah Provider ID.

#### Access the CE system at: https://utdre.useclarus.com/

#### NOTES:

- a) If logging in for the very first time, see the **Login for First Time** section of this document.
- b) For each active Provider, one Provider account is created. To have additional user accounts created, contact Pearson VUE via email: ce\_providers@pearson.com or call 1-800-274-4577 between 8AM-6PM Eastern Monday through Friday.

brightlink		Language +
	Please log III.	
	Username: Password: Login	
	Forgot your password? Reset it here.	
	If youre having technical problems, please email between 8AM-6PM ET M-F	ce_providers@pearson.com or call 1-800-274-4577

Enter your username into the "Username" field and your password into the "Password" field. Your Username is your Utah Provider ID.:

	Language +
Please log in.	
Username: 1234567-CEP0	
Password:	
Login	
Forgot your password? Reset it here.	
If you're having technical problems, please email, ce_provider between 8AM-6PM ET M-F	s@pearson.com or call 1-800-274-4577
Rowered by BrightLink	

Then click the "Login" button:

brightlink		Language 👻
	Please log in.	
	Username:	1234567-CEP0
	Password:	Login
	Forgot your password? R	teset it here.
	If you're having technical pr between 8AM-6PM ET M-F	roblems, please email: ce_providers@pearson.com or call 1-800-274-4577
	٨.	Powered by BrightLink

NOTE: If the following error message appears, check to make sure the CAPS LOCK on your keyboard is off.

The username/password combination you entered was not recognized.

After successfully logging in, the Utah Division of Real Estate CE Banking Portal Home page will appear:



#### Forgot Password

**NOTE:** The user must have a valid email address in the system to use this feature.

Click on the "Forgot your password? Reset it here" link at the bottom of the login page.

brightlink		Language 👻
	Please log in.	
	Username:	
	Password:	
	Login	
	Forgot your password? Reset it here.	
	If you're having technical problems, please on mail: ce_providers@pearson.com or between 8AM-6PM ET M-F	call 1-800-274-4577
	Rowered by BrightLink	

On the "Reset Password" page will appear:

	Language 👻
Please enter your username (Utah Provider ID) to reset your password.	
User Name:	
Reset Password	

Enter your Utah Provider ID (example: 1234567-CEP0) into the "User Name" field:

			Language 👻
Please enter your	usemame (Utah F	Provider ID) to reset your password.	
	User Name:	1234567-CEP0	
		Reset Password	
If you're having tee	chnical problems,	please email: ce_providers@pearson.com	
	A Powered t	by BrightLink	

Click on the "Reset Password" button to have a password reset email sent to the email address in the system.

		Language 👻
Please enter your username (Utah P User Name:	rovider ID) to reset your password. 1234567-CEP0	
If you're having technical problems, p	Reset Password	
🙏 Powered b	y BrightLink	

Open your email inbox. Open the password reset email. Click on the link in the email to reset your password.

#### Change Password

Click on the triangle behind your name in the upper-right corner of the Utah Division of Real Estate CE Banking Portal Home page to display the drop-down menu.



Click on the "Change Password" menu option on the drop-down menu:



The "Change Password" page appears:

	Utah Real Esta	te Portal	L Joe Provider
Home! COURSE COMPLETIONS	Change Password		
View Completions	Password Requirements:		
Submit Individual	Must have at least 6 character	rs	
Unload Completions	<ul> <li>Must contain at least 1 numb</li> <li>Must contain at least 1 punct</li> </ul>	er(s). ation character(s) from the set ##\$%	68'()*+ - /··<=>2@[\]^_'{ }~
Convertist	<ul> <li>You cannot reuse the same p</li> </ul>	assword within 90 days.	WWW THAT TOUGHT I W
in course bus	User Name:	1234567-CEP0	
	Current password:		
	New password:		
	Confirm new password:		
	Change Password and Lo	gin	

Enter your current password into the "Current password" field.

Enter your new password into the "New password" and the "Confirm new password" fields.

Current password:	
New password:	
Confirm new password:	

**NOTE:** The password requirements are:

- Must have at least 6 characters
- Must contain at least 1 number
- Must contain at least 1 punctuation character(s) from the set !"#\$%&'()\*+,-./:;<=>?@[\]^\_`{|}~
- You cannot reuse the same password within the last 90 days

Click the "Change Password and Login" button:

	Utah Real Esta	te Portal	L Joe Provider -
Homel COURSE COMPLETIONS	Change Password		
View Completions	Password Requirements:		
Submit Individual	Must have at least 6 characte	rs	
Lupload Completions	<ul> <li>Must contain at least 1 number(s).</li> <li>Must contain at least 1 number(s) from the set I"#\$%&amp;'()*+ - / '&lt;=&gt;2@0)^ '(0~)</li> </ul>		
Course List	<ul> <li>You cannot reuse the same page</li> </ul>	assword within 90 days.	001 = 0
-	User Name:	1234567-CEP0	
	Current password:		
	New password:		
	Confirm new password:	••••••	
	Change Password and Lo	gin	

The Utah Division of Real Estate CE Banking Portal Home page will appear:



No notifications to display

## Download a Course Completion Roster (.csv File) Template

On the Utah Division of Real Estate CE Banking Portal Home page, click on the "Upload New Course Completions" link in the center of the page or click on the "Upload Completions" link in the left navigation pane:

	Utah Real Estate Portal	L Joe Provider -
Home! COURSE	Welcome Joe Provider	
View Completions     Submit Individual	Your organization name: Park City Institute	
Upload Completions	To get started, select from one of the following options:	
Could List	<ul> <li>View Course Completions</li> <li>Upload New Course Completions</li> </ul>	
	Notifications	close all
	No notifications to display	

The "Upload Course Completions" page will appear:

	Utah Real	Estate Po	ortal	L Joe Provider -
Home! COURSE COMPLETIONS	Upload Course Co Use this page to upload	ompletions I a list of course completio	n records	
COMPLETIONS View Completions Submit Individual Completion Upload Completions Course List	Instructions Select a CSV file to uple License Number, Last N DO NOT upload a head Notes: 1. Download a sam	oad with the following colu lame, Course ID, Comple ler row, that record will fail ple file here.	Imns: tion Date (YYYY-MM-D	D format ONLY)
	Select file			🗯 Browse
	License Number	Last Name	Course ID	Completion Date

An example CSV file can be downloaded by double-clicking the blue here link in the "1. Download a sample file here" note:

	Utah Real	Estate Po	ortal	L Joe Provider ◄
Home! COURSE COMPLETIONS	Upload Course Co Use this page to upload	ompletions d a list of course completio	n records	
COMPLETIONS  View Completions  Submit Individual Completion  Upload Completions  Course List	Instructions Select a CSV file to upl License Number, Last I DO NOT upload a head Notica. 1. Download a sam	load with the following colu Name, Course ID, Complei der row, that record will fail uple file here.	mns: ion Date (YYYY-MM-E	DD format ONLY)
	Select file			🚰 Browse
	License Number	Last Name	Course ID	Completion Date

The example file will pop up at the bottom left of the screen once downloaded:

		Utah Real I	Estate Po	ortal	1 Joe Provider	•	
	Home! COURSE COMPLETIONS	Upload Course Com	pletions list of course completio	n records			
	View Completions Submit Individual Completion Completions Course List	Instructions Select a CSV file to uptool License Number, Last Nar DO NOT uptool a header Notes: 1. Download a sample	t with the following colu ne, Course ID, Complet row, that record will fail file <u>here</u> .	mns: Ion Date (YYYY-MM-D	D format ONLY)		
		Select file			🖀 Brows	e	
		License Number	Last Name	Course ID	Completion Date		
example.csv	^						Show all X

Double-click on the file to open the "example.csv" file in Excel. If the file does not pop up at the bottom left of the screen once downloaded, then check your "Downloads" folder in File Explorer:

File Home	Share View											^ C
Pin to Quick Copy access	Paste Paste shortcut	Move Copy to * Copy	Delete Rename	New tasy access *	Properties	Select all	,					
	Lippoard	Organ	nize	INCW	Open	Select						
$\leftarrow \rightarrow - \uparrow$	This PC > Download	ls							v õ	1	Search Downloads	
🖈 Quick acces	5	Name				D	late modified	Туре	Size			ľ
Desktop						4	/22/2022 5-04 PM	Microsoft Excel C	1	KB		

Double-click the file to open it. The "example.csv" file looks like this in Excel:

	A	В	С	D
1	License Number	Last Name	Course ID	Completion Date (YYYY-MM-DD format ONLY)
2				
3				
4				
5				
6				

To save the "example.csv" file on your computer, click on the word "File" in the top left corner of the Excel screen:

	AutoSave 💽 Off [	<b>। ७</b>		; D & Ø		♀ Search
	File Home	Insert Pa	age Layout	Formulas	Data Review View	Help
,		ori	<b>~</b> 11 <b>~</b>	A^ A   ≡ ≡	E ≫r ~ <sup>ab</sup> Wrap Text	Genera
	Paste S B	I <u>U</u> ~	🛛 -   💁 -	<u>A</u> ~   = =	Ē ☴   ☶ ☲   Ē Merge & C	enter ~ \$ ~
	Clipboard 🕞	For	nt	r <u>s</u>	Alignment	F2
	A1 * :	$\times$ $\checkmark$	∫x Lic	ense Number		
	A	В	С		D	E
	1 License Number	Last Name	Course ID	Completion Da	te (YYYY-MM-DD format ONL)	Y)
	2					
	3					
	4					
	5					
	6					

On the next page, click on "Save As:"

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D New						
Ð Open						
Info					2.2.2.1.1	
Save	Blank workbook	Personal monthly budget	Loan amortization schedule	Weekly chore schedule	Any year custom calendar	College expense estimator
Save As						More templates
Print	P Search					
Share	Recent Pinned Sha	ared with Me				
Export	🗅 Name				Date modified	
Publish	2022 - List of Web Rassatt, Eleen » Docum	services.xlsx sents			🖈 Just now	
Close	example.csv				1h ago	

On the "Save As" page, click on "Browse:"

1 New	(L) Recent	↑ Downloads		
3.0	Pearson PLC	example CSV (Comma delimited) (*.csv)		🕞 Save
info	OneDrive - Pearson PLC     Diana.Rutt@Pearson.com	More sptions		-
Save	Sites - Pearson PLC Diana.Rutt@Pearson.com	Name	Date modified ↓	
Save As	Other locations			
Print	This PC	a example.csv	4/22/2022 5:04 PM	
Share	Add a Place	Saved Data.csv	4/1/2022 5:09 PM	
Export	Browse	SystemHealth-2346 (1).csv	1/6/2022 5/28 PM	
Publish				

The "Save As" pop-up window will appear:

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Organize - New folder			<b>III</b> •	0
OSDisk (C:)	Porter	Name	Date modified	
app AppData	NUSICIS	V Today (1) End example.csv Continue this month (1)	4/22/2022 5:04 PM	
C My Docs		Earlier this month (1)     Saved Data.csv     Farlier this year (2)	4/1/2022 5:09 PM	
Dell		SystemHealth-2346 (1).csv	1/6/2022 5:28 PM	
File name:	¥	<		>
Save as type: CSV (Cor	mma delim	ited) (*.csv)		,
Authors: Diana R	utt	Tags: Add a tag		

On the "Save As" pop-up window, scroll through the left panel to find the folder location on your computer in which you want to save the "example.csv" file:

← → · · ↑ ↓ « Users	> ru > Downloads > v & D Downloads	
1 L2		
Organiza — New folder		- (
SDisk (C:)	Name Date modified	
1 Course Completion	Rosters V Today (1)	
app		14
AppData	a example.csv 4/22/2022 3:04 Pr	NI.
C My Docs	<ul> <li>Earlier this month (1)</li> </ul>	
ClientHealth	Saved Data.csv 4/1/2022 5:09 PN	4
Dell	V Earlier this year (2)	
Intel	SystemHealth-2346 (1).csv 1/6/2022 5:28 PM	4
oracle	V C SuctemHealth-2752 (5) rev. 1/6/2022 5/22 PM	4
File name: exemple	X45V	_
Save as type: CSV (Cor	nma delimited) (".csv)	
Authors: Diana Ri	utt Tags: Add a tag	

Click on the folder in which you want to save the sample file to select it:

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$\leftarrow \rightarrow \uparrow \uparrow \bullet$	○ Users > ruttdl >	Downloads	~ 0	,P Search Downloads	
Organize 👻 Ne	w folder			li: •	2
🗸 🎬 OSDisk (C:)	^	Name		Date modified	
1 Course Co	mpletion Rosters	v Today (1)			
> app	_	example.csv		4/22/2022 5:04 PM	
> AppData		~ Earlier this mo	onth (1)		
> C My Docs		Saved Data.cs	/	4/1/2022 5:09 PM	
ClientHealth	12	Earlier this year	ar (2)		
> Dell		SystemHealth	-2346 (1).csv	1/6/2022 5:28 PM	
> oracle		Sustemblealth	-2752 (5) eev	1/6/2022 5-22 PM	
, success	·	•			1
File name:	example.csv				
Save as type:	CSV (Comma delimit	ed) (*.csv)			
Authors:	Diana Rutt		Tags: Add a tag		

The folder you selected should be displayed at the top of the "Save As" window:

	« OSDi > 1	Course Completie	on R 🗸 Ö	Search 1 Course Com	pletion.
Irganize 🔻 Ne	ew folder			81 -	
🏥 OSDisk (C:)		^ Name	^	Date modified	
1 Course Co	ompletion Rosters		No items make	the second second	
арр			No items mate	en your search.	
AppData					
C My Docs					
ClientHealt	h				
ClientHealt	h				
ClientHealt Dell Intel	h				
ClientHealt Dell Intel oracle	h	v (		_	
ClientHealt Dell Intel oracle	h example.csv	v <		_	
ClientHealt Dell Intel oracle File name: Save as type:	h example.csv CSV (Comma d	v < elimited) (*.csv)			
ClientHealt Dell Intel oracle File name: Save as type: Authors:	h example.csv CSV (Comma d Add an author	v < elimited) (*.csv)	Tags: Add a tag		

Click into the "File name" field where "example.csv" is displayed and type in your new file name:

Save As							×
← → ~ ↑ 📙	« OSDi > 1 Cou	rse Completion R	~	õ	,P Search 1 Cou	irse Comple	tion
Organize 🕶 Ne	w folder					8:: •	0
SDisk (C:)	^	Name	^		Date mod	dified	1
AppData C My Docs	ompletion Rosters		No iter	ns match	your search.		
ClientHealth Dell Intel	h						
ClientHealth Dell Intel	h .				_		3
ClientHealth Dell Intel File name:	h course completion	roster for 20220404.csv	,		_		3
ClientHealth Dell Intel File name:	course completion	roster for 20220404.csv	×		_		~
ClientHealth Dell Intel File name: Sare as type: Authors:	course completion COV (Commo define Add an author	roster for 20220404.csv ited) (*tesv)	v Tags: Add (	a tag	_		~

Be sure the "save as type" field is set to: CSV (Comma delimited) (\*.csv):

Save As						×
← → • ↑	≪ OSDi > 1 Co	ourse Completion R	ڻ ~	₽ s	earch 1 Course Co	ompletion
Organize 🕶	New folder				Bee	- 0
SDisk (C:	) (	Name	^		Date modified	
1 Course	Completion Rosters					
арр			No items m	hatch your se	arch.	
AppData						
C My Do	cs					
ClientHe	alth					
Dell						
Intel						
oracle		~ <				
File nam	e: course completio	n roster for 20220404.csv				
Save as typ	CSV (Comma deli	mited) (*.csv)				
Contraction of the second second		1	ags: Add a tag			
Autho	rs: Add an author					
Autho	rs: Add an author					

Then, click on the "Save" button at the bottom of the pop-up window to save the file:

← → ~ ↑	> 1 Course Completion R.	5 V .	Q Search 1 Course Complete	etion
Organize 👻 New folder			800 -	0
SDisk (C:)	^ Name	^	Date modified	
1 Course Completion	n Rosters			
app		No items ma	ten your search.	
AppData				
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ClientHealth				
ClientHealth				
ClientHealth Dell				
ClientHealth Dell Intel oracle	v <			
ClientHealth Dell Intel oracle File name: course	v <	l.csv		~
ClientHealth Dell Intel File name: course Save as type: CSV (Co	completion roster for 20220404 pmma delimited) (*.csv)	l.csv		~ ~
ClientHealth Dell Intel oracle File name: course Save as type: CSV (Co Authors: Add an	completion roster for 20220404 pmma delimited) (*.csv) author	Lesv Tags: Add a tag		~

The "Save As" window will close and the newly-saved file (e.g., course completion roster for 20220404.csv) file will remain open in Excel. The new file name will display at the top of the window as show below:

File	Home	Insert Pa	age Layout	Formulas Da	ata Revie	w View Help	)				
ĥ	X Calib	ri	× 11 ×	A* A* = =	= ** -	👌 Wrap Text		General	*		
aste	S B	I <u>U</u> ~   ⊟	∃ -   <u>^</u> -	<u>A</u> - ≡ ≡ ₹	≣ ⊡ ⊡	🧱 Merge & Center	•	\$~% 9	80- 80 <sup>•</sup>	Conditional Formatting	
lipboa	ard Ts	For	nt	F <sub>S4</sub>	Aligna	nent	r <sub>N</sub>	Number	5		s
1	•	× ✓	∫∗ Lic	ense Number							
1	* : A	× ~	∫∗ Lic	ense Number	D		E	F	G	н	
Lice	× : A ense Number	B Last Name	fx Lic C Course ID	ense Number Completion Date (	D (YYYY-MM-D	D format ONLY)	E	F	G	н	
1 Lice	* : A ense Number	B Last Name	f <sub>x</sub> Lio C Course ID	ense Number Completion Date (	D (YYYY-MM-D	D format ONLY)	E	F	G	н	
Lice	* : A ense Number	B Last Name	fr Lic C Course ID	ense Number Completion Date (	D (YYYY-MM-D	D format ONLY)	E	F	G	н	
Lice	A A	B Last Name	fr Lic C Course ID	ense Number Completion Date (	D (YYYY-MM-D	D format ONLY)	E	F	G	н	

<u>All</u> the following information MUST be entered into the CSV file for <u>each</u> student that has completed the course:

- A. License Number
- B Last Name
- C. Course ID
- D. Completion Date (YYYY-MM-DD format ONLY)

#### NOTES:

- 1. <u>All</u> four data elements listed above are <u>required</u> for <u>each</u> student.
- 2. Course completions for a course completed on more than one date <u>may</u> be submitted in the same file.
- 3. Course completions for more than one course <u>may</u> be submitted in the same file.
- 4. The header row with column headings (Excel row 1) <u>can</u> be included in the file, however that row/record will error.
- 5. However, all other rows/records will <u>not</u> be impacted; the system will process the rest of the rows/records in the file even if the header row with column headings (Excel row 1) errors.
- 6. If you do not want to receive an error for the header row with column headings, then exclude it from the file that is uploaded.

Enter the required data into the file. Here's an example:

4	A	В	С	D	E
1	License Number	Last Name	Course ID	Completion Date (YYYY-MM-DD format ONLY)	
2	5482942-AI00	ALLAN	R220219	2022-04-04	
3	12417514-AB00	ABNER	R220219	2022-04-04	
4	11986882-AB00	ABEL	R220219	2022-04-04	
5	5479398-BB00	BLUE	R220219	2022-04-04	
6	11360945-CG00	CARTER	R220219	2022-04-04	
7	12769520-NMLO	NELSON	R220219	2022-04-04	
8					
9					
10	1				

After all data is entered, save the file on your computer by clicking on the "save" button on the top of the Excel screen:

F	le Home	B 9 ~ C	tavout Fo	rmulas Data Review View Help	404 Sa	wed 🕶
[		ni v	11 • A^ /	A <sup>×</sup> ≡ ≡ ⊗ × 8 <sup>b</sup> Wrap Text	General	
CI	ipboard 🕞	I <u>U</u> ~ ⊞ ~ Font	<u> ~ A</u>	× = = = = = = = B Merge & Center × Si Alignment Si	\$~9 N	6 🤊 5 umber
0	12 * 1	× ~ f	6			
1	А	В	с	D	Е	F
1	License Number	Last Name	Course ID	Completion Date (YYYY-MM-DD format ONLY)		
2	5482942-AI00	ALLAN	R220219	2022-04-04		
3	12417514-AB00	ABNER	R220219	2022-04-04		
1	11986882-AB00	ABEL	R220219	2022-04-04		
5	5479398-BB00	BLUE	R220219	2022-04-04		
5	11360945-CG00	CARTER	R220219	2022-04-04		
7	12769520-NMLO	NELSON	R220219	2022-04-04		
8						
-						

Or, click on the word "File" in the top left corner of the Excel screen:

	File Home	Insert Page L	ayout Fo	ormulas Data Review View Help		
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C	12 -	× ~ fx				
	A	В	с	D	E	F
1	License Numbe	r Last Name	Course ID	Completion Date (YYYY-MM-DD format ONLY)		
2	5482942-A100	ALLAN	R220219	2022-04-04		
3	12417514-AB00	ABNER	R220219	2022-04-04		
4	11986882-AB00	ABEL	R220219	2022-04-04		
5	5479398-BB00	BLUE	R220219	2022-04-04		
6	11360945-CG00	CARTER	R220219	2022-04-04		
7	12769520-NML0	NELSON	R220219	2022-04-04		
8						

On the next page, click on "Save" on the left side of the page:

		4	course completion roster for 20220404.c	sv - Saved
©	Good afternoon			
🟠 Home	~ New			
D New	A DEBUG		-	
D Open	2			
Info	4 5 6	EIIIFII		
Save	Blank workbook	Personal monthly budget	Loan amortization schedule	Weekly chore schedu
Save As				
Print	P Search			
Share	Parant Dinnad Ch	ared with Me		
Export	D	area what we		
Publish	LITCE Stage 20220	1425 csv		
Close	C = UT CE			
	Saved Data (1).csv Downloads	1		

The window will close and the file will be saved, as noted at the top of the file in Excel:

4	AutoSave 💽 [	<b>8 9 ·</b> C -	- a la l	🗁 😼 ∓ course completion roster for 20220	0404 Sa	ved •
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0	12 - 1	XV	fx			
0	• •	× ✓ )	fe C			
1	12 • : A	× ✓ ) B	fx C	D	E	F
1	A License Number	B Last Name	C C C C C C C C C C C C C C C C C C C	D Completion Date (YYYY-MM-DD format ONLY)	E	F
1 2 2	A License Number 5482942-A100	B Last Name ALLAN	C Course ID R220219	D Completion Date (YYYY-MM-DD format ONLY) 2022-04-04 2023-04-04	E	F
1 2 3 4	A License Number 5482942-AI00 12417514-AB00	B Last Name ALLAN ABNER ABE	C Course ID R220219 R220219 R220219	D Completion Date (YYYY-MM-DD format ONLY) 2022-04-04 2022-04-04 2023-04-04	E	F
1 2 3 4 5	A License Number 5482942-AI00 12417514-AB00 11986882-AB00 5479398-BB00	B Last Name ALLAN ABNER ABEL BULE	C Course ID R220219 R220219 R220219 R220219	D Completion Date (YYYY-MM-DD format ONLY) 2022-04-04 2022-04-04 2022-04-04 2022-04-04	E	F
1 2 3 4 5 6	A License Number 5482942-AI00 12417514-AB00 11986882-AB00 5479398-BB00 11360945-CG00	B Last Name ALLAN ABNER ABEL BLUE CARTER	C Course ID R220219 R220219 R220219 R220219 R220219 R220219	D Completion Date (YYYY-MM-DD format ONLY) 2022-04-04 2022-04-04 2022-04-04 2022-04-04 2022-04-04	E	F
1 2 3 4 5 6 7	A License Number 5482942-AI00 12417514-AB00 11986882-AB00 5479398-BB00 11360945-CG00 12769520-NMI	B Last Name ALLAN ABNER ABEL BLUE CARTER NELSON	C Course ID R220219 R220219 R220219 R220219 R220219 R220219 R220219	D Completion Date (YYYY-MM-DD format ONLY) 2022-04-04 2022-04-04 2022-04-04 2022-04-04 2022-04-04 2022-04-04	E	F
1 2 3 4 5 6 7 8	A License Number 5482942-AI00 12417514-AB00 11986882-AB00 5479398-BB00 11360945-CG00 12769520-NMLO	B Last Name ALLAN ABNER ABEL BLUE CARTER NELSON	C           Course ID           R220219           R220219	D Completion Date (YYYY-MM-DD format ONLY) 2022-04-04 2022-04-04 2022-04-04 2022-04-04 2022-04-04 2022-04-04 2022-04-04	E	F

Follow the instructions in the **"Upload New Course Completion Roster (via a .csv file)"** section of this document (page 20) to upload the file.

## Upload New Course Completion Roster (via a .csv file)

On the Utah Division of Real Estate CE Banking Portal Home page, click on the "Upload New Course Completions" link in the center of the page or click on the "Upload Completions" link in the left navigation pane:

	Utah Real Estate Portal	L Joe Provider -
Home! COURSE	Welcome Joe Provider	
View Completions     Submit Individual     Completion	Your organization name: Park City Institute	
Upload Completions	To get started, select from one of the following options:	
Could List	<ul> <li>View Course Completions</li> <li>Upload New Course Completions</li> </ul>	
	Notifications	close all
	No notifications to display	

The "Upload Course Completions" page will appear:

	Utah Real	Estate Po	ortal	L Joe Provider →
Home! COURSE COMPLETIONS	Upload Course Co Use this page to upload	ompletions I a list of course completion	on records	
<ul> <li>View Completions</li> <li>Submit Individual Completion</li> <li>Upload Completions</li> <li>Course List</li> </ul>	Instructions Select a CSV file to upl <i>License Number, Last I</i> DO NOT upload a head Notes: 1. Download a sam	oad with the following col Name, Course ID, Comple ler row, that record will fa ple file here.	umns: ation Date (YYYY-MM-Di I	D format ONLY)
	Select file			着 Browse
	License Number	Last Name	Course ID	Completion Date

Use this page to upload a list or roster of course completion records.

Click the "Browse" button on the right side of the page to browse your computer for the .csv file to upload.

	Utah Real	Estate Po	ortal	L Joe Provider -
Home! COURSE COMPLETIONS	Upload Course Co Use this page to upload	ompletions d a list of course completio	n records	
<ul> <li>View Completions</li> <li>Submit Individual Completion</li> <li>Upload Completions</li> <li>Course List</li> </ul>	Instructions Select a CSV file to up License Number, Last DO NOT upload a hear Notes: 1. Download a sam	load with the following colu Name, Course ID, Comple der row, that record will fail nple file here.	imns: tion Date (YYYY-MM-D	DD format ONLY)
	Select file			🚔 Browse
	License Number	Last Name	Course ID	Completion Date

The "Open" pop-up window will appear:

R Open		×
$\leftarrow$ $\rightarrow$ $\checkmark$ $\uparrow$ $\blacklozenge$ > This PC > Dot	wnloads > v Ö 🔎 Sear	ch Downloads
Organize 🔻 New folder		III 🕶 🔲 💡
SDisk (C:)     I Course Completion Rosters     app	Name V Today (1)	Dati
<ul> <li>AppData</li> <li>C My Docs</li> <li>ClientHealth</li> </ul>	I Saved Data (1).csv ✓ Last week (1) I example.csv	4/2:
> Dell	<ul> <li>✓ Earlier this month (1)</li> <li>☑ Saved Data.csv</li> <li>✓ Earlier this year (2)</li> </ul>	4/1/
<ul> <li>PerfLogs</li> <li>product</li> </ul>	SystemHealth-2346 (1).csv	1/6/ 1/6/
> Program Files	<pre>/ ()))</pre>	>
File name:	<ul> <li>✓ Microsoft</li> <li>Oper</li> </ul>	Excel Comma Separa V Cancel

On the "Open" pop-up window, scroll through the left panel to find the folder location on your computer that contains the course completion roster (.csv file) to upload:

$\leftarrow \rightarrow \land \uparrow \clubsuit$ This PC $\rightarrow$ I	iloads >	~ õ	, Search Downloads
Organiza - Novefalder			III 🕶 🛄
V 🚔 OSDisk (C:)	^ Name		0
1 Course Completion Rosters	V Today (1)		
> 📙 app	Saved Data (1	1) cov	4
> 📙 AppData	Last wook (1)		
> 🧧 C My Docs	V Last week (1)		
ClientHealth	example.csv		4
> Dell	✓ Earlier this m	onth (1)	
> intel	Saved Data.cs	54	4
> oracle	Earlier this ye     Earlier this ye	ar (2)	
PerfLogs	SystemHealth	h-2346 (1).csv	1
> product	SystemHealth	h-2752 (5).csv	1
> Program Files	v c	(30)	
File name:		~	Microsoft Excel Comma Separa

Double-click on the folder in which your file is located to select and open it:

	← → ~ ↑ 🧧 « OSDi > 1 C	ourse Completion R	~ Č	,○ Sei	arch 1 Course Complet	ion
	Organize 👻 New folder					0
	🗸 🏥 OSDisk (C:)	^ Name	^		Date modified	
	1 Course Completion Rosters	course com	pletion roster for 20	0220404.csv	4/25/2022 4:54 PM	
1	> 🔤 app					
	> 🔤 AppData					
	> C My Docs					
	ClientHealth					
	> Dell					
	> intel					
	> oracle					
	PerfLogs					
	> product					
	> Program Files	v «				
	File name:			Microso	ft Excel Comma Separa	a v

Click on the file name to highlight it:

→ * ↑ _ « OSDi > 1	Course	Completion R	~	Ö	,○ Sei	arch 1 Course	Comple	tion
ganize 🔻 New folder								0
SDisk (C:)	^	Name	^			Date modifi	ed	
1 Course Completion Roster	s	course com	pletion roste	r for 202	20404.csv	4/3		
C My Docs								
Dell Intel oracle PerfLogs product Program Files	~ <	¢.						

Then, click on the "Open" button at the bottom of the pop-up window to upload the file:

← → ~ ↑ 📙 « OSDi >	1 Cours	e Completion R V Ö 🔎 S	earch 1 Course Completion
Organize 🔻 New folder			III • 🔟 👔
SDisk (C:)	^	Name	Date modified
	ers	course completion roster for 20220404.csv	4/25/2022 4:54 PM
ClientHealth Dell Intel oracle PerfLogs product Program Files			
File name: co	ourse co	mpletion roster for 20220404.csv V Micros	oft Excel Comma Separa ~

The CE system will review the file and provide the Total number of records in the file as well as list the number of rows/data in the file:

course complet	ion roster for 2022		Remove	Browse	
%					Run Impor
Total	Processed	Success	Errors		
7	0	0	0		
License Number	Last Name	Course ID	Completion Date		
License Number	Last Name	Course ID	Completion Date (YYY	Y-MM-DD format O	NLY)
5482942-AI00	ALLAN	R220219	2022-04-04		
12417514-AB00	ABNER	R220219	2022-04-04		
11986882-AB00	ABEL	R220219	2022-04-04		
5479398-BB00	BLUE	R220219	2022-04-04		
11360945-CG00	CARTER	R220219	2022-04-04		
12769520-NMLO	NELSON	R220219	2022-04-04		

Click the "Run Import" button to import/upload the records into the system.

- course complet				E COUSE
6				Run Import
Total	Processed	Success	Errors	
7	0	0	0	
license Number	Last Name	Course ID	Completion Date	
License Number	Last Name	Course ID	Completion Date (YYYY-I	MM-DD format ONLY)
5482942-AI00	ALLAN	R220219	2022-04-04	
12417514-AB00	ABNER	R220219	2022-04-04	
11986882-AB00	ABEL	R220219	2022-04-04	
5479398-BB00	BLUE	R220219	2022-04-04	
11360945-CG00	CARTER	R220219	2022-04-04	
12769520-NMLO	NELSON	R220219	2022-04-04	

Once the file is 100% processed by the CE system, the Processed, Success, and Error numbers on the page will be updated.

course comple	course completion roster for 20220404.csv			Remove	Browse .
		100%			Run Impo
Total 7	Processed 7	Success 6	Errors 1		
License Number	Last Name	Course ID	Completion Date		

If there are errors with records in the file, the record(s) will be highlighted in pink:

course complet	ion roster for 202	20404.csv		Remove	Brows
		100%			Run Im
Total 7	Processed 7	Success 6	Errors 1		
License Number	Last Name	Course ID	Completion Date		
License Number	Last Name	Course ID	Completion Date (YYY)	Y-MM-DD format OI	NLY)

**NOTE:** If the header row IS included in the .csv file, it will error as show above. Also as shown above, the rest of the rows/records in the file are processed even though the header row erred.

**REMINDER:** Exclude the header row from the file if you do not want that record to error.

Correct the erred records and submit those records in a new file.

# Submit Individual Course Completion — for Individual Students

On the Utah Division of Real Estate CE Banking Portal Home page, click on the "Submit Individual Completion" link in the left navigation pane.

Home! COURSE COMPLETIONS	Welcome Joe Provider	
View Completions	Your organization name: Park City Institute	
Submit Individual Completion	To net started, select from one of the following onlines:	
Upload Completions     Course List	To get stated, select non one of the following options.	
	View Course Completions	
	Lupload New Course Completions	
	Malifications	

The "Upload Candidate Record" page will appear:

	Utah Real	Estate Portal	L Joe Provider -
Home! COURSE COMPLETIONS	Upload Candida	te Record	
<ul> <li>View Completions</li> <li>Submit Individual Completion</li> </ul>	License		Q
Upload Completions Course List	Last Name		
	Course Completion Date	mm/dd/yyyy	
	Course Client ID	Select	~
		Submit	

Enter the license number of the student that completed the course into the "License" field.

Enter the last name of the individual in the "Last Name" field.

Click in the "Course Completion Date" field to enter the course completion date (in mm-dd-yyyy format).

Course Completion	02/25/ <mark>2022</mark>	
Date		

Or click on the calendar button <sup>D</sup> in the right side of the "Course Completion Date" field to make the calendar pop up. Then click on the correct date.



Click on the "Course Client ID" field to display all active courses. Scroll to find the correct course and then click on it to select the course.

Course Client ID	Select	~
	Select R220219 - HOME WARRANTY/RISK REDUCTION	

After all information is entered, click the "Submit" button at the bottom of the page.

A pop-up window will display a "success!" message if the course completion was submitted successfully:



Click the "OK" button to close the pop-up window.

## View Course Completions (Previously Submitted)

	Utah Real Estate Portal	L Joe Provider →
Home! COURSE COMPLETIONS	Welcome Joe Provider	
View Completions  Submit Individual Completion  Upload Completions  Course List	Your organization name: Park City Institute To get started, select from one of the following options:  View Course Completions  Upload New Course Completions	
	Notifications	close all
	No notifications to display	

The most recently submitted course completions are displayed:

MPROVING PROC	F				Suc Provider •
Home!	▼ Search				
COURSE	License Number	First Name	Last Name	Course	Completion Date
COMPLETIONS	5482942-AI00	MATTHEW	ALLAN	R220219	2022-04-04
<ul> <li>View Completions</li> <li>Submit Individual Completion</li> </ul>	11360945-CG00	SUSAN	CARTER	R220219	2022-04-04
1 Upload Completions	11986882-AB00	SARAH	ABEL	R220219	2022-04-04
🏛 Course List	12769520-NMLO	DYNNAKA	NELSON	R220219	2022-04-04
	5479398-BB00	MICHAEL	BLUE	R220219	2022-04-04
	12417514-AB00	RYAN	ABNER	R220219	2022-04-04
	6103845-SA00	MATTHEW	SMITH	R220219	2022-02-25
	5486933-PB00	ALEXANDER	MILLER	R220219	2022-02-20
	Note: a maximum of	25 results can be retu	urned per query. Click	"Search" to refine you	ır query.

Click on the Course number to see the course name:



**NOTE:** A maximum of 25 results can be returned per query. Click the "Search" button to refine your query:

Home!	▼ Search				
COURSE	License Number	First Name	Last Name	Course	Completion Date
COMPLETIONS	5482942-AI00	MATTHEW	ALLAN	R220219	2022-04-04
View Completions Submit Individual Completion	11360945-CG00	SUSAN	CARTER	R220219	2022-04-04
L Upload Completions	11986882-AB00	SARAH	ABEL	R220219	2022-04-04
Course List	12769520-NMLO	DYNNAKA	NELSON	R220219	2022-04-04
	5479398-BB00	MICHAEL	BLUE	R220219	2022-04-04
	12417514-AB00	RYAN	ABNER	R220219	2022-04-04
	6103845-SA00	MATTHEW	SMITH	R220219	2022-02-25
	5486933-PB00	ALEXANDER	MILLER	R220219	2022-02-20

The "Search Completion Records" page appears:

First Name		
Last Name		
Course ID		
Completed After		
Completed Before		
Sort By	Select an Option	
		(*) denotes a required field

Enter data into any one or more of the following fields on the "Search Completion Records" page

First Name

Last Name

Course ID

**Completed After** 

Completed Before

X Close		
Search Completion R	Records	
First Name		
Last Name	Smith	
Course ID	R220219	
Completed After		
Completed Before		
Sort By	Select an Option	•
		(*) denotes a required field
	Submit	

Select an option from the "Sort By" drop-down menu, if needed:

Sort By	Select an Option	*
		٩
	Completion Date (Descending)	
	Completion Date (Ascending)	
	Course ID	
	Last Name	
	First Name	

Then click the "Submit" button on the bottom of the page. The search results appear:

	Utah Re	al Estat	e Portal		L Joe Provider -
Homel	▼ Search				
COURSE	License Number	First Name	Last Name	Course	Completion Date
COMPLETIONS	6103845-SA00	MATTHEW	SMITH	R220219	2022-02-25
View Completions			control (		
Submit Individual Completion	Note: a maximum of .	25 results can be re	turned per query. Click	"Search" to refine you	ir query.
Upload Completions					
m Course List					

#### Remove/Delete Course Completions

If a course completion is entered in error, please contact Pearson VUE via email at the following address: **ce\_providers@pearson.com**. Provide all the incorrect data that was submitted.

#### Review Course List

On the Utah Division of Real Estate CE Banking Portal Home page click on the "Course List" link on the left panel:



The course list will appear:

	Utah R	eal Estate Portal		L Joe Provider -
Home!	▼ Search			
COURSE	Course ID	Title	Date Span	Credits
COMPLETIONS	✓ R220219	HOME WARRANTY/RISK REDUCTION	2/24/2022 to	2
View Completions				
2 Submit Individual Completion	Note: a maximum	of 25 results can be returned per query. Click "Se	earch* to refine your	query.
1 Upload Completions				
m Course List				

#### Review or Update User Profile

Click on the triangle behind your name in the upper-right corner of the Utah Division of Real Estate CE Banking Portal Home page to display the drop-down menu.



No notifications to display

Click on the "User Profile" menu option in the drop-down menu:

orightlink 📥	Utah Real Estate Portal	L Joe Provider -	
IMPROVING PROOF		Joe Provider	
Homel		Organization Profile	
COURSE	Welcome Joe Provider	User Profile	
COMPLETIONS		Change Password	
View Completions  Submit Individual Completion	Your organization name: Park City Institute	Logout	
1 Upload Completions	To get started, select from one of the following options:		
🏛 Course List	View Course Completions		
	Upload New Course Completions		
	Notifications	close all	
	No notifications to display		

#### The "Account Information" page appears:

	Utah Real Estate Portal	L Joe Provider -
Home! COURSE COMPLETIONS	Account Information	C Update Profile
View Completions	Joe Provider	
Completion	64 Zoo Lane	
🌲 Upload Completions	Suite 200	
🏛 Course List	Greentown, UT 22222	
	Joe.Provider@parkcityinst.com	
	+1 435 222 2222	

Click the "Update Profile" link in the upper-right corner of the page.

unt Information	🖸 Update Profile
vider Lane 10 wn, UT 22222 vider@parkcityinst.com	
	vider Lane I0 wn, UT 22222 vider@parkcityinst.com 222 2222

#### The "Provider User Profile" page appears:

Home!	Provider User Profile		
COURSE COMPLETIONS	Email	Joe.Provider@parkcityinst.com	
Submit Individual Completion	First name *	Joe	
▲ Upload Completions ▲ Course List	Last name	Provider	
	Telephone	+1 435 222 2222	
	Address	64 Zoo Lane	
	Address (cont.)	Suite 200	
	City	Greentown	
	Postal Code	22222	
	Country	United States •	
	State	Utah •	
		Save Changes	(*) denotes a required field

Edit the necessary fields:

Email	Joe.Provider@parkcityinst.com	
First name *	Joe	
Last name	Provider	
Telephone	+1 435 222 2222	
Address	64 Zoo Lane	
Address (cont.)	Suite 200	
City	Greentown	1
Postal Code	84060	]
Country	United states	
State	Utah	
		(*) denotes a required fiel

Then click on the "Save Changes" button on the bottom of the page:

Email	Joe.Provider@parkcityinst.com	
First name *	Joe	
Last name	Provider	
Telephone	+1 435 222 2222	
Address	64 Zoo Lane	
Address (cont.)	Suite 200	
City	Greentown	
Postal Code	84060	
Country	United States *	
State	Utah •	

The "Data updated successfully" message will appear at the top of the page after the changes are saved by the system as show below.

	rightlink Utah Real Estate Portal			
Homel COURSE COMPLETIONS	Data updated successfully.		×	
View Completions	Provider User Profile			
2 Submit Individual Completion	Email	Joe.Provider@parkcityinst.com		
Deload Completions				
Course List	First name *	Joe		
	Last name	Provider		
	Telephone	+1 435 222 2222		
	Address	64 Zoo Lane		
	Address (cont.)	Suite 200		

## Log Out

Click on the triangle behind your name in the upper-right corner of the Utah Division of Real Estate CE Banking Portal Home page to display the drop-down menu.



Click on the "Logout" menu option in the drop-down menu:

Welcome Joe Provider	Organization Profile User Profile	
	Change Password	
To get started, select from one of the following options:	Logout	
Notifications	close all	
	Welcome Joe Provider         Your organization name: Park City Institute         To get started, select from one of the following options:         Image: Optimized Started Start	

The Login page will appear:

	Language 🗸
Please log in.	
Username:	
Password:	
	Login
Forgot your password?	Reset it here.
If you're having technical p between 8AM-6PM ET M-F	roblems, please email: ce_providers@pearson.com or call 1-800-274-4577 =

Make sure the Course exists in the system before uploading a CSV file/roster or submitting course completions.

Make sure the student license number is correct. The course completion will not load into the system if any of the following are incorrect:

License Number

Last Name

Course ID

Completion Date (YYYY-MM-DD format ONLY)

Contact Pearson VUE email: **ce\_providers@pearson.com** or call 1-800-274-4577 between 8AM-6PM Eastern Monday through Friday.

Set the Completion Date fields in the .csv file to "Text" so the date can be entered in the format required by the system (YYY-MM-DD)

	+	, ·	ew View Help	Review	ulas Data	Formu	age Layout	Insert Pa	ile <u>Home</u>	Fil
Text ~		Te	ab Wrap Text	æ.	= = =	A* A*	× 11 ×	bri	Calit	ŕ
<b>9</b>   €00 .000	\$~% \$	~ \$	🔁 Merge & Center			<u>A</u> ~	∃ -	I <u>U</u> •   [	aste 🎸 B	Pa
	- Humber			Augun		22-04-04	<i>f</i> <sub>x</sub> 20	× v	2 * :	D2
G	E F	E		D			с	В	A	4
			D format ONLY)	YY-MM-D	tion Date (YY	Comple	Course ID	Last Name	License Number	
					04	2022-04-	R220219	ALLAN	5482942-A100	
					04	2022-04-	R220219	ABNER	12417514-AB00	
					04	2022-04-	R220219	ABEL	11986882-AB00	
					04	2022-04-	R220219	BLUE	5479398-BB00	
					04	2022-04-	R220219	CARTER	11360945-CG00	;
					04	2022-04-	R220219	NELSON	12769520-NMLO	
					04	2022-04-	R220219	NELSON	12769520-NMLO	7