

COMPLIANCE Education Platform



Frequently Asked Questions

Q: Can we still send data feeds to and from LIMRA as our IT department currently does today?

A: Yes, the automated feeds to and from the SFTP mailboxes will continue to be the way most companies will send and receive their compliance data.

Q: If a student is added using the CEP portal, will they have access to the course immediately?

A: The course will be available much quicker than the current two business days. Our goal is for 2 hours or less.

Q: What is the Main Contact and Authorized User?

A: The Main Contact authorizes current and future CEP authorized users, plus has all the functions of an authorized user. An Authorized User can access to the CEP Portal to search student activity and transcripts, submit enrollments, and submit terminations. There can be multiple Authorized Users.

Q: Who is our Main Contact and our Authorized Users?

A: Current contacts will not automatically carry-over to the new CEP Portal. Please tell LIMRA who the Main Contact and all Authorized Users will be for the CEP portal with [this form](#). Send the completed form to: compliance@limra.com

Q: Does our IT person need to be an Authorized User to send the automated file?

A: No. Authorized Users are for the CEP Portal use.

Q: What is “Auto-Certification”?

A: Enrolled companies will automatically receive certifications for other refresher courses completed that are different from what was assigned. Similarly, for newly appointed producers, companies will be able to define how far back (in months) to look for refresher course completions. For example, companies with a 24-month recertification requirement, where the individual completes a refresher course today, would automatically receive the certification in the next reporting (or have it available through the CEP portal). For newly appointed producers, any refresher course completed in the prior 24 months will be reported in the next reporting.

Q: How do we sign up for Auto-Certification? Is there a cost?

A: You will need to enroll for Auto-Certification. Please contact compliance@limra.com for more information.

Q: Will the Search only display the students that our company has enrolled?

A: Yes, the search function will display only the students that you have enrolled.

Q: Will the Search function display all the courses the student has completed, whether we have enrolled them or not?

A: The CEP portal will display all the course information that your company has enrolled the student. If you use the auto-certification option, you will also see any additional refresher courses completed by the student in the lookback period you have designated.

Q: What do we need to do if our company would like to continue to receive the New IDs file?

A: Let us know and we will continue to create it and make it available. compliance@limra.com

Q: When can we begin using the new format?

A: LIMRA can accept the new format (pipe-delimited) AML enrollment files: **3/11/2019**; The last day LIMRA will accept current format (comma-delimited) enrollment files: **7/31/2019**. *(Please note: If your company is concerned with meeting this deadline, please contact us)*

Important Note: We will no longer generate the New ID file as of April 19, 2019. Prior to the launch of CEP this information can be found on either the CFM site or Status reports. *(If this presents a problem for your company, please contact us.)*