COMPLIANCE
Education Platform

Upcoming Changes to LIMRA's Compliance Education Platform

Things are about to get easier for you!

#4

This is the **fourth of a series** of monthly communications regarding exciting changes coming to our Compliance Education Platform (CEP). The previous communications described how the changes will benefit your organization. ***This communication specifies the changes, as well as how we can help your organization prepare to use the new platform to its fullest capabilities.***

1. The new CEP platform is integrated with the learning (CFM) platform.

How is this integration better for you?

   a. Completions shown on the CFM platform are reflected on the CEP platform. **It will no longer be necessary to check two different sources.**
   b. When the CEP platform goes live, your company administrator will be able to **look-up a complete student transcript** (enrollments and completions) in near real-time. See the sample transcript below.
   c. The CEP platform will reflect all courses an individual enrolled in for your company and the completion status of each. **Companies will have the same view of completions as available to the LIMRA help desk.**
   d. Company administrative access to the CEP portal will **replace the administrative look-up** to the CFM platform currently available.

Sample Transcript

Program	Course Name	Status	% Complete	Enroll Date	Last Accessed Date	Completion Date
AML	(2) Anti-Money Laundering for Insurance Producers	Completed	100.00	3/10/2016	3/19/2010	3/19/2010
	(22016) 2016 Anti-Money Laundering for Insurance	Enrolled, Not Started	0.00	3/10/2016		
	(22018) 2018 Anti-Money Laundering for Insurance	Enrolled, Not Started	0.00	3/9/2018		

What can you do to ensure the right people in your organization experience these enhancements?

As we get closer to the launch date, we will reach out to ask you to identify those individuals that should have access to enroll and terminate students, retrieve files, and look up students with the associated progress.

Continue to the next page to learn more about the Compliance Education Platform enhancements!

2. The CEP platform will be able to automatically certify refresher courses to companies, completed within a defined period.

What's in it for you and the producer?

    a. **Streamlined and speedy certification process**. This enhanced service will allow companies to receive certifications, automatically, 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.

    b. **Reduced delay** in AML certification, improving business flow.

    c. **Reduced follow up** with the producers for AML certification where a qualifying course was already completed.

    d. **Eliminates the need for manual certification requests** via email or help desk calls.

> **What do you need to do <u>now</u> to prepare for the new auto-certification feature?**
>
> Please contact Vince Peterson at 860-709-8233 or vpeterson@limra.com for more information implementing this feature.

3. With the addition of an *"Enrolled – not Started"* status on the progress report, the *"New IDs"* file is considered redundant and no longer necessary. If needed, this file will remain available to you upon request.

> **What do you need to do if your organization would like the "New IDs" file?**
>
> Please contact Vince Peterson at 860-709-8233 or vpeterson@limra.com if your company requires this file.

If you have any questions regarding this information, please contact Vince Peterson at 860-709-8233 or vpeterson@limra.com.

Remember, you may view previous communications by accessing: https://www.limra.com/CEPCOMM/