

CE PROVIDER PORTAL USER GUIDE

How to Use This Resource

This user guide provides instructions for how to navigate the ASHA CE Provider Portal in order to complete and monitor a variety of tasks related to course and offering registration and participant reporting.

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CE Provider Portal Dashboard

In this section, you will learn the following:

- How to access the CE Provider Portal
- How to interpret the information displayed on the Dashboard
- How to navigate to other sections of the CE Provider Portal

Accessing the CE Provider Portal and Dashboard

Once you've logged into www.asha.org, go to the *My Account* page, click on the CE Provider Portal link under the "CE Provider Management" heading, and click on the Provider name. This will take you to the CE Provider Portal Dashboard, where you can access all sections of the Portal. (**Note:** If you are the CE Administrator for multiple organizations, each Provider will have its own separate CE Provider Portal.)

Information Displayed on the Dashboard

- **Provider Information** – The top of the Dashboard includes your ASHA Approved CE Provider name as well as the name and contact information for your Provider Manager and Accounts Manager.
- **Navigation Bar**
 1. *Dashboard* – This returns you to the Dashboard page from any other page.
 2. *Registration and Cancellation* – This is where you go to submit course and offering registrations, review your pending courses and registered course information, review offerings that require attention, cancel course offerings, and access cooperative fee invoices and receipts.
 3. *Reporting and Rosters* – This is where you go to report on course offerings using ASHA CE's [Excel Reporting Template](#), view the status of Excel reporting files that are being processed, review and request corrections to course offering rosters, and access your archived rosters.
- **Custom Reports** – This is where you go to generate custom reports, including a custom list of your organization's registered courses and offerings, a custom list of participants reported in your offerings, and a list of offering reporting that is due soon.
- **Courses That Require Attention**
 1. The number of courses requiring attention is based on how many courses have a red status and require your attention (Additional Information Required, Wrong Course Type Consultation Needed – Missed Deadline) on the *Registration and Cancellation* page.
 2. The number indicates how many courses require an action to be registered.
 - If the number is 0, it will appear in a green circle, which means that no courses require action on your part.
 - If the number is greater than 0, it will appear in a red circle, which means that a number of courses require action on your part.
 3. Clicking on the "Review Courses" button will take you to the *Registration and Cancellation* page, where the courses with a red status (Additional Information Required, Wrong Course Type Consultation Needed – Missed Deadline) should appear toward the top of the list of courses (only behind course registrations that are "In Progress").
- **Offerings That Require Attention**
 1. The number of course offerings requiring attention is based on how many offerings have a red status and require an action (Consultation Needed, Cooperative Fee Owed, or Received Late), indicated by a red exclamation point in the "Offering(s) Need Attention" column on the right side of the *Registration and Cancellation* page.

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2. The number indicates how many course offerings require an action to be registered.
 - If the number is 0, it will appear in a green circle, which means that no course offerings require action on your part.
 - If the number is greater than 0, it will appear in a red circle, which means that a number of course offerings require action on your part.
 3. Clicking on the “Review Offerings” button will take you to the *Registration and Cancellation* page, where the user can identify those courses that have offerings with a red status (Consultation Needed, Cooperative Fee Owed, or Received Late) by clicking on the “Offering(s) Need Attention” column heading on the right and selecting courses with an exclamation point in that column.
- **Reporting That Requires Attention**
 1. The number of course offerings with reporting requiring attention is based on how many offerings have a reporting “Past Due” status for any Provider who reports using .csv files, Excel files, or paper forms.
 2. The number indicates how many course offerings have reporting that requires an action.
 - If the number is 0, it will appear in a green circle, which means that no course offerings have reporting that requires you to take an action.
 - If the number is greater than 0, it will appear in a red circle, which means that a number of course offerings have reporting that requires you to take an action.
 3. Clicking on the “Review Reporting” button will take you to the “Submit Offering Reporting” tab within the *Reporting and Rosters* page. A list of registered offerings is included under the “Search for a Course Offering” heading. Offerings with reporting that requires you to take an action (offerings with a reporting status of “Past Due”) are marked with an exclamation point to the left of the offering number. These offerings will always be prioritized at the top of the list. This screen lists all offerings that are registered and have reporting that is due.
 - **Rosters That Require Attention**
 1. The number of course offerings with rosters requiring attention is based on how many offerings include roster corrections that have information entered but have yet to be submitted to ASHA CE (i.e., you have started making corrections but haven’t finished the process).
 2. The number indicates how many course offerings have rosters that require you to take an action, or that are pending review by ASHA CE.
 - If the number is 0, it will appear in a green circle, which means that no course offerings have rosters that require you to take an action.
 - If the number is greater than 0, it will appear in a red circle, which means that a number of course offerings have rosters that require you to take an action.
 3. Clicking on the “Review Rosters” button will take you to the “Current Rosters” tab in the “Rosters and Corrections” section of the *Reporting and Rosters* page. The course offerings included on this list with an exclamation point to the left of the course offering number indicate rosters that require you to take an action. Those with an orange “Participant Changes Submitted” status don’t require you to take an action but are under review by ASHA CE staff.
 - **Provider Status** – Lists your organization’s ASHA Approved CE Provider status, along with an explanation of the status.
 - **Current Provider Personnel** – Lists your organization’s current Provider personnel, including the Continuing Education Administrator (a.k.a. CE Administrator or CEA), Continuing Education Content Consultant (if applicable), the CE Administrator’s Supervisor/Alternate Contact, and Administrative

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Assistant/Administrative Support (if applicable). It also includes a link to the Request to Change CE Provider Personnel Form if you need to request a change.

- **Provider Resources** – A box with links to relevant resources for Providers. The resources included are:
 1. *CE Provider Portal User Guide [PDF]* – Click on this link to open the CE Provider Portal User Guide.
 2. *Download My ASHA CE Brand Block* – Click on this link to go to the Bynder Digital Asset Management system to download a zip file with 2 versions of your organization’s Brand Block along with a version of the ASHA CE Provider Insignia. Once you arrive on the Bynder page, click the blue “Download (1)” button on the right side of the screen to download the zip file. When you open the folder on your computer, you’ll see the 3 files (2 Brand Blocks – one in PDF and one in JPEG format, and 1 Insignia in JPEG format).
 3. *Brand Block Guidelines* – Click on this link to access guidance on how to properly use the Brand Block files in promotional materials for your courses.
 4. *Insignia Guidelines* – Click on this link to access guidance on how to properly use the ASHA CE Provider Insignia in marketing materials for your organization.

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Course and Offering Registration and Cancellation

In this section, you will learn the following:

- How to search for an existing course
- The various course statuses
- How to add a new course
- How to add a new offering
- How to add additional offerings to registered courses
- How to edit offering information
- How to delete an offering
- How to cancel an offering
- How to address a late offering submission
- How to pay a cooperative offering fee

You'll find this section in the Navigation Bar at the top of the Dashboard. Clicking on "Registration and Cancellation" will take you to the *Courses and Offerings* page, where you can search for a course by course number, title, or course status.

Courses and Offerings

Course Status

The system automatically updates the course status in real time, reflecting the status of your course registration. Track where your course is in the registration process using the course status. These are the most common course statuses and what they mean:

- **Not Submitted**– The user has started a registration and has saved information on the form but has not yet submitted the course registration.
- **Submitted** – The user has submitted the course to ASHA CE for registration. Once the course is in Submitted status, it can no longer be edited, and no attachments can be added.
- **Under Review** – Your ASHA Provider Manager is reviewing the course for registration. The user cannot edit the course if it's "Under Review."
- **Additional Information Required** – The ASHA Provider Manager has reviewed the course and has requested additional information needed to register the course. Only sections for which additional information is requested are open for edits, along with any corresponding document upload fields. For information on the process used to submit additional information, please see the "Submitting course edits requested in the 'Additional Information Requested' e-mail" section below.
- **Wrong Course Type** – The wrong course type was indicated when the course was submitted. The CE Provider Portal displays only the fields/questions that apply for the course type selected. Therefore, the user must delete the registration submitted with the wrong course type, and the course must be re-entered and submitted using the correct course type, so the correct fields/questions appear. For additional information on the process used when the user is notified that they selected the wrong course type, please see the "Wrong course type notification for your registration" section below.
- **Registered** – The course is registered for ASHA continuing education units (CEUs). The CEA should review the course and offering information to ensure its accuracy and may save or print the Course Registration Confirmation for their records.
- **Under consultation** – The course cannot be registered because a CEB Requirement was not satisfied. It will be registered once you consult with your Provider Manager, and the issue is resolved.

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“Offering(s) Need(s) Attention” Column

“Offering(s) Need(s) Attention” has been added to the course table with the expanded CE Provider Portal. This is a sortable field. An exclamation point will appear for any course with offerings that require the user to take an action, such as when

- a consultation with your Provider Manager or Accounts Manager is needed
- a cooperative fee is owed, or
- the offering was received late (if it missed the registration deadline) and a consultation with your Provider Manager is needed.

Offerings needing attention can be identified by clicking on the “Offering(s) Need(s) Attention” column heading and selecting courses with an exclamation point.

Add a Course

Click on the “Add a Course” button located at the top right of the page to begin entering a course’s registration information.

Course Registration

Entering Information into Each Section

1. Enter a Course Title, enter the unique four-digit Course ID, select a Course Type, enter the Start Date of the earliest offering, and then click “Add Course.”
2. Click “View Your Course,” and complete each section:
 - a. Course Information
 - b. Course Details
 - c. Planning and Development
 - d. ASHA CEUs and Course Structure
 - e. Disclosure
 - f. Promotional Materials
 - g. Product Information (Note: this section is for Blended/Self-Study courses ONLY.)
 - h. Attachments (upload documents to this section, if necessary)
3. Click on “Course Overview” to add offerings by using the process described in the [“Offering Registration and Cancellation”](#) section below.

Under course details, you will be asked whether you want to include your course on ASHA CEFind. CEFind is a search engine for learners to find courses offered publicly for ASHA CEUs. You can use this tool to promote your courses. It is very important to provide complete registration information, including: the registration URL, and whether there are any fees associated with registration (e.g. a registration fee, a subscription fee, or a fee to submit participant information). Only choose “no” if there are ***absolutely no fees*** (it is a completely free course).

Saving Course Registration Information in the CE Provider Portal

When entering information into each section of the form, you will see two buttons at the bottom of each section: a gray “Save as Draft” button and a blue “Save” button.

If you do not have all the registration information for a course, but want to start entering it, use the gray “Save as Draft” button to save a section left incomplete. When you use the “Save as Draft” button, the system

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then changes the corresponding section's status to "In Progress" on the left navigation panel. If any section's status is "In Progress," you cannot submit the course for registration.

Use the blue "Save" button for completed sections as you enter the course information. Once you complete a section, select the blue "Save" button to save it. When you use the "Save" button, the corresponding section's status is then listed as "Complete" on the left navigation panel. When all sections' statuses are listed as "Complete," when you've added at least one course offering, and when you see the green checkmark for the course registration on the "Course Overview" screen, you may submit the course registration.

Any incomplete course that is saved appears in the "Registration and Cancellation" section of the Courses and Offerings page as "In Progress." To access an incomplete registration, select "Course Title" on the *Courses and Offerings* page.

Uploading Documents to Your Course Registration

Upload the promotional materials and any other applicable documents (e.g., learning outcomes, time-ordered agenda, ASHA CEU Calculation Worksheet, etc.) to the "Attachments" section. If the learning outcomes and/or time-ordered agenda are parts of your promotional materials, you can indicate that in the system, and you may upload all of these items as part of the promotional materials. The only three acceptable formats for uploads are Word (.doc or .docx), Excel (.xls), and/or Adobe (.pdf). There is a 4 MB file size limit to any document that you upload in the CE Provider Portal. Please ensure that the size of your file is 4 MB or less before attempting to upload.

Go to the "Attachment" section to upload documents.

1. Select the "Browse" button next to the corresponding "Attachment" section.
2. Select the file, and the document should attach automatically.
3. You can preview the document by selecting the "Preview" button to verify that you successfully attached the correct document.
4. If you attached the wrong document, then select "Remove," and attach the correct document.

The document file name will change upon upload to reflect the type of document requested (e.g., if you upload a .pdf file in the "Promotional Materials" field, its file name in the registration system will be "Promo_Materials_CourseID.pdf"). The document is the same one that the user uploaded, except that the system has changed the document's file name. If the system does not automatically rename the file, then you have not successfully uploaded the file. Double-check the file type and/or file size to ensure that your file has met the system's criteria (see [criteria listed above](#)).

If you are registering a Blended or Individual Learning Experience (Self-Study) and indicate that you are using a Pilot Study to determine the number of ASHA CEUs, the Course and Offering Registration and Cancellation System will also prompt you to upload the Pilot Study Form [DOC].

Submitting the Registration

You can access the Submission Checklist from the *Course Overview* page and use it to track the status of your course and offering registration. The Submission Checklist will have two red X's, and the "Submit to ASHA" button will not be clickable. Once you complete the course registration information, the top X will change to a green check mark. After you add at least one offering, the bottom X will change to a green check mark. Only

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when both items have green check marks will the “Submit to ASHA” button be activated. On the *Course Overview* page, under the “Submission Checklist” heading, click the blue button labeled “Submit to ASHA.” Any course that you have submitted will appear on the *Courses and Offerings Overview* page with a status of “Submitted” in the list of courses.

Making Changes Once You Submit the Course

You cannot edit the information in the course registration after you’ve submitted it. The only exception is when your Provider Manager requests additional information. In this case, the system opens for editing, only those fields for which the Provider Manager has requested additional information and any corresponding document upload fields. If you’ve submitted the form in error, please contact your Provider Manager. Use the CE Course and Offering Registration Information Change Form to report any changes to the information submitted in the registration.

Submitting Course Edits Requested in the “Additional Information Requested” Email

1. From the Dashboard, click on the “Registration and Cancellation” link at the top of the page in the Navigation Bar, locate the course by searching or selecting “Additional Information Requested” from the status dropdown menu, and select the “Course Title.”
2. From the *Course Overview* page, click the “Manage Your Course” button.
3. Select sections that have a status of “! Requested Additional Information” in red. Any section with a green “Accepted” status will still be locked from editing.
4. For each of these sections, click the “Edit” button, update the course registration as requested for the fields noted in red, and click the “Save” button in that section.
 - When preparing to upload a new document, please click the “Edit” button, update the course registration for the section corresponding with the document, and click the “Save” button.
 - Once you’ve saved that section, go to the “Attachments” section, and upload the updated document where appropriate (e.g., Promotional Materials, Learning Outcomes, Course Structure/Agenda, etc.).
5. Once you enter the information requested and each section’s status is either “Accepted” or “Complete,” return to the *Course Overview* page, and click the blue “Submit to ASHA” button.

Wrong Course Type Notification for Your Registration

The CE Provider Portal displays only the fields/questions that apply for the course type selected. For example, suppose a user erroneously selects a Group (live) course type, but that user should have selected an Individual (self-study) course type. This means that the wrong course registration fields/questions will appear for the course registration. To rectify this situation, you must delete the original registration that you had submitted (which had the wrong course type), re-enter the course registration, and submit it using the correct course type. This will ensure that the appropriate fields/questions appear on the form. The same Course ID (number) previously used for the course that you had registered under the wrong course type will now be available for the new course.

Take the following steps to delete the existing registration submission and resubmit the course using the correct course type (Note: in doing so, you’ll delete all of the information from the initial deleted registration, including attachments; therefore, you must include that information on the resubmitted registration.):

1. From the Dashboard, select “Registration and Cancellation” at the top of the page.

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2. Locate the course by searching on its name or by selecting “Wrong Course Type” from the status dropdown menu and select the “Course Title.”
3. From the *Course Overview* page, click the red “Delete” button.
4. Return to the “Courses and Offerings” section, click the “Add Course” button to re-enter the registration using the correct course type, and submit when finished.

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Offering Registration and Cancellation

Adding Offerings to Your Group Course Registration

1. From the Dashboard, click on “Registration and Cancellation” at the top of the page.
2. Locate the course on the *Courses and Offerings Overview* page by searching for the course number or title and select the “Course Title.”
3. Click on “Manage Your Offerings.”
4. Click on “Add Offering.”
5. Enter Date/Location Information and indicate whether you’ll be listing the offering on ASHA CEFind.
6. Select whether this offering is a Cooperative/Joint Providership. If so, provide relevant information.
7. Click on “Save.” Then, repeat Steps 4–7 as needed for each additional offering.

Note: When adding offerings prior to course submission, you can edit offering information or delete entire offerings. Please be advised that deleting an offering will cause the offering number to disappear completely, and there is no way to re-number offerings to bring it back. Once you’ve submitted the course, you’ll need to request any offering edits or deletions by using the [CE Course and Offering Registration Information Change Form](#).

There is no restriction on how many offerings you may add to a Live (Synchronous) course registration within its 5-year validity period.

Adding Offerings to Your New Self-Study Course Registration

1. From the Dashboard, click on the “Registration and Cancellation” link at the top of the page.
2. Locate the course on the *Courses and Offerings Overview* page by searching for the course number or title, and click on the “Course Title.”
3. Go to “Manage My Offerings” on the *Courses and Offerings Overview* page.
4. Use the “Autogenerate My Offerings” link. It will generate monthly offerings based on the dates you enter.
5. You’ll see a box to the right that contains the course valid dates. Add the “earliest date available” for your first offering, which must fall within the range of course valid dates.
6. Then add the “last date available,” which must fall within the range of course valid dates.
7. You can reset the offerings if you haven’t yet submitted the course. Resetting deletes all the offerings you’ve entered and allows you to restart.
8. To add offerings to previously registered Self-Study courses with existing validity, you will need to manually create additional offerings. Autogenerate is available only for new course submissions. All offerings added to previously registered Self-Study courses with existing validity must have a duration of 1 month or less (i.e., the start and end date must occur in the same calendar month).

Editing an Offering Before You Submit a Course

The “Edit Offering” feature is available before you submit a Live (Synchronous) course (i.e., before you click the “Submit to ASHA” button on the Course Overview page). Once you submit a course, the “Edit Offering” button is no longer available. Use the [Course and Offering Registration Information Change Form](#) to change an offering after you’ve submitted a course.

1. From the Dashboard, click on the “Registration and Cancellation” link at the top of the page, locate the course on the *Courses and Offerings Overview* page by searching for the course number or title, and click on the “Course Title.”
2. On the *Course Overview* page, click the blue “Manage Your Offerings” button.

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3. Find the offering in question and click on it.
4. From the Offering Information page, click the blue “Edit Offering” button. This button is available only before you submit a course for registration (i.e., before you click the “Submit to ASHA” button on the Course Overview page).
5. Make the necessary edits to the offering information.
6. When you’re finished, click the blue “Submit Offering” button.

Deleting an Offering Before You Submit a Course

The “Delete” feature is available only before you submit a course (i.e., before you click the “Submit to ASHA” button on the Courses and Offerings Overview page). Once you submit a course, the “Delete” button is no longer available. Use the “Cancel Offering” feature (described next) if you decide to cancel an offering after you have already submitted the course.

1. From the Dashboard, click on the “Registration and Cancellation” link at the top of the page, locate the course by searching for the course number or title, and click on the “Course Title.”
2. Click on the blue “Manage Your Offerings” button.
3. Find the offering in question and click on it.
4. From the *Offering Information* page, click the red “Delete” button. This button is available only before you submit a course for registration (i.e., before you click the “Submit to ASHA” button on the Course Overview page).
5. Click the red “Yes, Delete Offering” button in the window that pops up, or choose the blue “No, Do Not Delete” button if you selected “Delete” in error.

After the offering is deleted, the offering number assigned to the deleted offering disappears and cannot be used for another offering (it is skipped and should not be used for reporting).

Cancelling an Offering After You’ve Submitted a Course

The “Cancel Offering” feature is available after you submit a course (i.e., after you click on the “Submit to ASHA” button on the *Course Overview* page). Before you submit a course, the “Cancel Offering” button is not available. Use the “Delete” feature (described previously) if you decide to remove an offering before submitting a course. This action means that you are reporting on the offering. If you make a mistake, please notify your Accounts Manager as soon as possible.

1. From the Dashboard, click on the “Registration and Cancellation” link at the top of the page, locate the course by searching for the course number or title, and click on the “Course Title.”
2. Click on the blue “Manage Your Offerings” button.
3. Find the offering in question and click on it.
4. From the *Offering Information* page, click the red “Cancel Offering” button. This button is available only after you’ve submitted a course for registration (i.e., after you click the “Submit to ASHA” button on the Course Overview page). Remember that you must submit cancellations by the 45-day reporting deadline for the offering.
5. Click on the red “Yes, Cancel Offering” button in the window that pops up, or choose the blue “No, Do Not Cancel” button if you selected “Cancel Offering” in error.

After the offering is cancelled, the offering number assigned to the cancelled offering cannot be used for another offering.

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You can confirm that you've cancelled an offering by going to the *Offering Registration* page. When you cancel the offering, its "Reporting Status" will change to "Offering Cancelled," its "Registration Status" will change to "Not Held," and the date on which you cancelled the offering will be displayed in the "Report Received" field.

How to address a Missed Offering Registration Deadline – Consultation needed

1. From the Dashboard, click on the "Registration and Cancellation" link at the top of the page; Locate the course by searching for the course number or title and click on the "Course Title."
2. The system will take you to the *Courses and Offerings Overview* page.
3. Click on the blue "Manage Your Offerings" button.
4. Find the offering in question, which should have a red message indicating "Response Needed"
5. Click on the blue "Submit Response" button.
6. In the text box provided explain the circumstances that prevented your organization from meeting the ASHA CE Board's requirement(s) and the steps that you've put into place to ensure compliance in the future.
7. Your CE Provider Team will contact you for consultation and assistance.

Cooperative Offerings and Payments

Determining Whether the Course Offering(s) is a Cooperative or a Joint Providership

A cooperative offering is when one ASHA Approved CE Provider joins with another organization or entity that is not an ASHA Approved CE Provider to plan, deliver, and evaluate a continuing education course offering(s) for ASHA CEUs. ASHA CE assesses a fee for cooperative offerings, and the CE Provider Portal calculates the fee based on the number of cooperative offerings entered.

A joint providership offering is when two or more ASHA Approved CE Providers team up to plan, deliver, and evaluate continuing education course offering(s). One of the ASHA Approved CE Providers must take responsibility for the registration and reporting of the course offering(s) to ASHA. ASHA CE does not assess cooperative fees when the other organization is an ASHA Approved CE Provider.

Copying the Cooperative Organization Information from One Offering to Another

1. From the *Courses and Offerings Overview* page, click on the blue "Manage Your Offerings" button.
2. From the *Offering Registration* page, click on the orange "Add Offering" button.
3. Enter the offering information, including the cooperative organization information.
4. Click on the blue "Save Offering" button.
5. Take either Step A or Step B below:
 - A. Click on the blue "Duplicate" button to the right of the Cooperative Offering Number (e.g., Offering 001, Offering 002, etc.) and dates OR
 - B. From the *Offering Registration* page, select the blue Cooperative Offering Number (e.g., Offering 001, Offering 002, etc.) that includes the cooperative organization information. This takes you to the Offering Information page. At the bottom of the *Offering Information* page, click the orange "Duplicate Offering" button.
6. Enter the offering information. At this point, the system will automatically copy the cooperative organization information.
7. Click on the blue "Save Offering" button.

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Fees for Cooperative Offerings

Go to the ASHA website for a [list of ASHA CE fees](#); however, the CE Provider Portal will also automatically calculate the fee for you.

Paying the Cooperative Offering Fee

The cooperative offering fee invoice is available on the *Courses and Offerings Overview* page only after submission of the cooperative course registration to ASHA CE and/or after submission of additional cooperative offerings for a course. The cooperative offering fee is always due at the time of course offering submission.

1. From the Dashboard, click on the “Registration and Cancellation” link at the top of the page then locate the course by searching for it.
2. Click on the “Course Title.”
3. From the *Courses and Offerings Overview* page, under the “Invoices and Receipts” heading, you may select the blue invoice number to view/download/print the invoice.
 - **To pay the cooperative fee online**, from the *Courses and Offerings Overview* page, under the “Invoices and Receipts” heading, select the blue “Pay Online” link.
 - **To pay the cooperative fee via check**, print the invoice, and mail the bottom section of the invoice with the check.
 - Make the check payable to “American Speech-Language-Hearing Association.”
 - Mail the check and receipt to the following address: American Speech- Language-Hearing Association, P.O. Box 1160, #340, Rockville, MD 20849.
 - Please be sure to include the Provider code and course number in the memo line on the check.
 - **To pay the cooperative fee over the phone**, call the ASHA Action Center at 800-498- 2071, and provide the invoice number to pay using a credit card.
 - ASHA accepts Visa, MasterCard, and Discover for payment of the cooperative fee, but not American Express.
 - Once you’ve paid the cooperative fee, you may return to the *Courses and Offerings Overview* page, and select the blue “Receipt” link under the “Invoices and Receipts” heading to view/download/print the receipt.

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Participant Reporting and Rosters

In this section, you will learn the following:

- How to report participants using the Excel template
- How to report zero participants for course offerings
- How to provide additional information about reported offerings
- How to search for rosters that are ready for review
- How to review rosters for your reported offerings
- How to make roster corrections

This section of the CE Provider Portal can be found in the Navigation Bar at the top of any page in the CE Provider Portal. Three options are available on the Reporting and Rosters page: “Submit Offering Reporting”, “Reporting in Progress” and “Rosters and Corrections.” We explain each of these three options in the first three subsections below (titled “Option #1,” “Option #2,” and “Option #3”). The fourth and final subsection, titled “Roster Changes,” explains the process of reviewing the changes you’ve made to the offering roster and submitting those changes via the system.

Option #1: Submit Offering Reporting

You may take two actions on this page: “Reporting Participants” and “Reporting Zero Participants.”

Reporting Participants

This is where you upload participants if your organization decides to use the [Excel Reporting Template](#) to report.

See the [Excel Reporting Instructions](#) for details on how to report using the Excel method. See the [Excel Reporting Template](#) to format the information correctly.

If you wish to report participants using a .csv file (a.k.a. “electronic reporting”), paper participant forms, or the web, please review these options for further information, so you can decide which reporting method works best for your organization. If you need additional assistance, consult the reporting decision tree to help guide you to the best option.

Reporting Zero Participants

This is also where you may report zero participants if your course offering was held but no one requested ASHA CEUs. This is a new way to report zero participants requesting ASHA CEUs using the “Submit Reporting” section, but you can still report zero participants as you have done in the past as well. This new option is available for all Providers regardless of how they typically report on offerings (.CSV, paper forms, etc.), not just those Providers who submit reporting using the Excel Reporting Template.

1. Go to “Reporting and Rosters” section under the Navigation Bar.
2. Select “Submit Reporting.”
3. Search for the course offering you wish to report by course number, course title, offering number, or end date.
4. Click “Report.”
5. The course offering information should appear for that offering.
6. Enter “0” into the “Total Participants” box, and the “Excel Upload” field will disappear.

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7. Then, click “Submit to ASHA CE.”
8. A message should pop up saying, “Submission Successful.”

Any offering that is not reported on by 30-days after the due date will automatically be updated to Reported with Zero Participants and closed out accordingly.

Option #2: Reporting in Progress

There are two tabs on this page: “Processing” and “Pending.”

Processing

The “Processing” tab shows course and offering information and/or processed participants that require further action by ASHA CE Staff. ASHA CE may require additional information if any of the following scenarios arise:

- The number of participants submitted doesn’t match the number indicated by the Provider.
- The Excel file format is not valid.
- The offering end date doesn’t match the end date ASHA CE has on file from then registration.
- ASHA CEUs are not approved for this course.
- The user is requesting offering information that is out of sync with the CE system.
- ASHA CE staff is manually processing the participants that are being reported.

Pending

The “Pending” tab shows uploaded participant files that are in the queue to be processed. After the system processes an offering, it may take up to 24 hours for that offering’s roster to appear in Rosters and Corrections. This page does not display progress associated with reporting submitted via (a) paper participant forms (i.e., bubble sheets), (b) web forms, or (c) using the .csv file format.

Option #3: Rosters and Corrections

There are two tabs on this page: “Current Rosters” and “Archived Rosters.”

Current Rosters

This is where current rosters are available for review. ASHA IDs, participant names, ASHA CEUs, and completion dates are displayed for each participant in the selected course offering, along with the “Roster Changes Due Date.” An exclamation point indicates that you’ve made changes to the roster, but you’ve not yet submitted them to ASHA CE.

You can search for rosters by using any of these methods:

- Offering End Date
- Course and Offering Number
- Participant ASHA ID

You can also search by offering status, including the following:

- Participant Changes Submitted
- Participant List Updated
- Reporting Processed

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Please review all the course offerings in this section by the “Roster Changes Due Date” listed after the offering end date, regardless of whether an offering has the status of “Reporting Processed” or “Participant List Updated” (in green). Offerings with a status of “Reporting Processed” have been fully processed by ASHA CE and are ready for review. Any offering with a green “Participant List Updated” status means that the system has processed your submitted roster changes for that offering or that ASHA CE has approved and processed a participant appeal. Click on the offering number to go to that offering’s roster, which lists all the participants reported for that offering.

Under “Current Rosters,” there are two tabs: “Full Roster” and “Roster Changes.”

Full Roster

Here, you should review the roster for accuracy (ASHA IDs, participant names, ASHA CEUs, and completion dates). If you notice any discrepancies, you may request changes on this page. Remember, you must submit any changes by the “Roster Changes Due Date” listed.

To look up a participant, use the “Search” field. You can search by both the ASHA ID that you submitted and the ASHA ID that we found for that person (if the two are different).

Here you will find the following columns of information:

ASHA ID	First Name	Last Name	ASHA CEUs	Completion Date	CE Registry Fee	Actions
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- **To add a participant:** Use the “Add Participant” button at the top of the roster listing. You can add a missing participant by entering all the required fields (First Name, Last Name, Address, Email, Completion Date, ASHA CEU Amount) and then clicking “Add to Roster Changes.” The ASHA ID is an optional field that you should include if that ID number is available to you.
- **To edit ASHA CEU information for a participant:** Click on the pencil icon at the end of the row with that participant’s name. A new screen will appear with the Current ASHA CEU Amount and Current Completion Date and with boxes where you can enter the New ASHA CEU Amount and New Completion Date. You can edit one or both items. Make the appropriate change(s) and click on “Add to Roster Changes.”
- **To delete a participant:** Click on the trash can icon at the end of the row with that participant’s name. A pop-up box will appear that says, “Remove participant.” That box will contain the participant’s name, ASHA ID, ASHA CEUs, and completion date. Use the “Add to Roster Changes” button to remove that participant from the roster.

Please note: These changes are not yet considered a submission. You will be able to review all changes to the roster by selecting the “Roster Changes” tab. If all the information is correct, then click the “Submit” button.

Roster Changes

This is where you go to review the changes you’ve made to the offering roster and to submit those changes. After you submit changes, the system will lock the roster, and you cannot submit additional changes. When ASHA CE processes the changes, the offering reporting status changes to “Participant List Updated,” and the

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system unlocks the roster for further changes. If you need to make a change while the roster is locked, you may enter that change using the “Contact ASHA CE” link when viewing the roster.

Archived Rosters

You can view archived rosters in this section. ASHA CE archives rosters in the CE Provider Portal for 24 months following their “Roster Corrections Due By” date. If you need to find a roster for your records, you may search your archived rosters to locate the roster you’re looking for.

You can search for archived rosters by using any of these methods:

- Offering End Date
- Course and Offering Number
- Participant ASHA ID

Click on the offering number to access the archived roster. Unlike current rosters, the archived rosters are locked, and you cannot edit or request changes through the CE Provider Portal. You can download the roster as a .pdf file by clicking on the “Download PDF” hyperlink. If there is a discrepancy in an archived roster that must be corrected, you may click on the “contact ASHA CE” hyperlink to request a change. An ASHA CE staff member will respond to your request with information on the next steps.

In an archived roster, you have the same two tabs as under “Current Rosters”: “Full Roster” and “Roster Changes.”

Full Roster

This tab provides a complete listing of the participants reported for the offering’s archived roster. Unlike in the “Current Rosters” section, you may not edit the participant information found in the archived roster. You may sort participants in the archived roster by ASHA ID, Last Name, First Name, ASHA CEU Amount, or Completion Date.

Roster Changes

This tab provides a list of any changes that were made to the roster after the initial course offering reporting. If any changes were made to the roster, this tab will display the ASHA ID of the participant, the date the change was submitted, and the date the change was processed.

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Custom Reports

In this section, you will learn the following:

- The different types of reports available
- The information included in each report
- How to generate custom reports

Click on “Custom Reports” in the Navigation Bar to access custom reports. Reports are in Excel format. Please disable your browser’s pop-up blocker for this page; otherwise, your report may not appear after you select the parameters and click “Create Custom Report.” If the report that you generate is blank, try entering different parameters.

Types of Custom Reports

Courses and Offerings List

This custom report provides a complete list of courses and offerings (within current course validity dates). Use this report to verify what you’ve registered in the system, among other things.

1. Select “Courses and Offerings List” from the “Select a Custom Report” dropdown menu.
2. Click the “Create Custom Report” button.
3. Your Courses and Offerings List report will appear as a pop-up in Excel format.

Participant List

This custom report provides a list of all participants that have completed offerings between the end dates you enter (within the last 2 years). Use this report to manage rosters on a larger scale if you’re reporting multiple offerings at once. Due to Excel limitations, this custom report will generate a maximum of 65,000 participants. If you receive an error, try limiting your date range.

1. Select “Participant Listing” from the “Select a Custom Report” dropdown menu.
2. Select your date range by entering dates in both the “From” and “To” fields under the “Offering With End Dates Between:” heading.
3. Click the “Create Custom Report” button.
4. Your Participant Listing report will appear as a pop-up in Excel format.

Reporting Due Soon

This custom report helps you manage your offering reporting deadlines. It will include offerings that have due dates within the date range you select, as well as any offerings that are past due. ASHA CE will stop sending Due Soon Notifications at some point. You can run this Reporting Due Soon report at regular intervals convenient to you and at a frequency of your choosing (weekly, monthly, etc.).

1. Select “Reporting Due Soon” from the “Select a Custom Report” dropdown menu.
2. Select your date range by clicking on one of the options under the “Show Offering Reporting Due:” heading. When you click on “Other,” the system will prompt you to enter an “Offering Reporting Due By:” date. In this case, the Reporting Due Soon report will include offerings with due dates between the current date up to and including the date you indicate. Any offerings that are past due will appear with a red offering status.
3. Once you have made your selection and entered the applicable information, click the “Create Custom Report” button.
4. Your Reporting Due Soon report will appear as a pop-up in Excel format.

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Appendix - Troubleshooting

Fees

- [Where do I find my invoice?](#)

Registration

- [I need to change the course validity dates for my course. What do I do?](#)
- [I'm having trouble uploading an attachment on my course registration form.](#)
- [Something odd happened when I attempted to auto-generate monthly Individual \(Self-Study\) Course Offerings, and I now have offerings that are longer than 31 days.](#)
- [I am unable to resubmit a course registration after making revisions requested by my Provider Manager. How do I do that?](#)

Reporting

- [A participant has given me an ASHA ID number that doesn't match the usual eight-digit number format.](#)
- [I'm having trouble uploading my Excel attachment for reporting.](#)
- [How do I know which rosters I have reviewed?](#)

Fees

Where do I find my invoice?

If you are looking for your cooperative fee invoice, you will find it in the Registration and Cancellation section; search for the appropriate Course Number, and you will find the Invoice in the Invoices/Receipts section at the bottom of the Course Overview screen.

If you are looking for your Annual Provider Fee invoice, it is not currently available in the CE Provider Portal. You will need to find the original email you received from ASHA CE, as the invoice will be attached to that email. If you cannot locate the email, contact your Accounts Manager, and they can resend it.

Registration

I need to change the course validity dates for my course. What do I do?

Once you've passed the initial Add Course screen, you aren't able to edit the course validity dates. If you've not yet submitted your course, you can click the red "Delete" button on the Course Overview screen, which will enable you to re-create the course with the corrected dates (you will also be able to re-use the original Course ID number).

If you have already submitted the course—or have a more complicated situation—please contact your Provider Manager directly.

I'm having trouble uploading an attachment on my course registration form.

Take the following steps:

1. **Make sure the file is not currently open elsewhere on your computer.** Most internet browsers will not allow an attachment to be uploaded if they are open in another program.

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- 2. Check the internet browser you are using.** The Portal works best with Microsoft Edge or Google Chrome, so you may need to switch browsers.
- 3. Check the file format of your attachment.** The Portal accepts only .pdf, .docx, and .xlsx file types.
- 4. Check the size of the document.** There is a file size limit of 4 MB, so you may need to make a lower-quality version if the file is too large.
- 5. Check the file name.** Try renaming the file. Only include alpha-numeric characters (no accents/symbols, etc.) in the filename, and ensure there are no leading/trailing spaces in the filename. We are aware that many internet browsers do not give the names of uploaded files in the character sets required by the server, and this can cause an error. Renaming to ensure only ASCII characters (or “standard English” letters/numbers/punctuation) are used should resolve this. Even if the filename looks to be all ASCII characters, it may be using extended characters (e.g., an ellipsis character, non-ASCII quotes, or other punctuation, etc.), so it is worth manually renaming the file if in any doubt at all.
- 6. Clear your internet browser’s cookies/browsing cache, then restart your browser.** Some browsers work differently than others, so review your browser’s Help/Support sections for more details on this step (search “how do I clear my cache?”).
- 7. Copy or download the file to your home/desktop folder and upload from there.** If the file is on a shared/network drive, your internet browser may not be able to read it. Even if the file is on your local machine, there may be file or directory permissions that prevent the browser from reading the file from its current location.
- 8. If the above steps do not work, email your Provider Manager for assistance.** Please include A) a quick list of troubleshooting steps you have already tried and B) any screenshots (or even a screen recording) of what you are attempting to do and the result you’re getting—these can help us identify the issue much more quickly!

Something odd happened when I attempted to auto-generate monthly Individual (Self-Study) Course Offerings, and I now have offerings that are longer than 31 days.

Occasionally, actions taken by CE Administrators or ASHA can impact the Portal’s auto-generate feature for Individual (Self-Study) offerings. If you encounter this issue, DO NOT SUBMIT YOUR COURSE; it is much easier to re-generate your offerings prior to course submission than to fix them after. First, follow these troubleshooting steps:

1. Check to see if you have the CE Provider Portal open in any other browser windows or tabs. If so, close them so that you’re working in the Portal from only a single browser window/tab.
2. Check the browser you’re using—the Portal works best with Microsoft Edge or Google Chrome, so you may need to switch browsers.
3. Clear your browser’s cookies/browsing cache, then restart your browser. Some browsers work differently than others, so review your browser’s Help/Support sections for more details on this step (search on the phrase “how do I clear my cache?”).

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Once you've taken the above three steps, go into your Offerings List for the course. Click the "Reset Offerings" button. Reenter your offering timeframe and other information, and then regenerate the offerings from there. If the offerings still don't follow the expected monthly pattern, take some screenshots, or screen recordings as able, and email your Provider Manager ASAP, as there may be something on ASHA's end that needs to be addressed. Do not submit the course until your Provider Manager has been able to help you fix things!

I am unable to resubmit a course registration after making revisions requested by my Provider Manager. How do I do that?

1. Go to the CE Provider Portal. From the Dashboard, you will see a box labeled "Courses That Require Attention." This box will have a red circle containing the number of courses that need attention. Click on "Review Courses" in that box.

Any course that needs revisions will have a red status that reads "Additional Information Requested" and should be located at or near the top of the course list. If not, you may use the status dropdown box or the search bar to locate the course in question. When you've found the course, click on its title to go to the Course Overview screen.

2. Double check the Submission Checklist from the Course Overview page to ensure that there is a red X next to "Completed all sections of the course registration." If so, click on the course registration link in the Submission Checklist box or the "Manage Your Course" button on the left side of the screen.

Note: If you do not see a red X in the submission checklist AND the "Submit to ASHA" button is not clickable, please contact your Provider Manager for assistance.)

3. On the left side of the course registration form, you will see the Table of Contents with the sections of the form listed. Any sections that list the green status of "Accepted" with a checkmark are all set and cannot be edited.

Look for any section that has a red status of "Additional Information Requested" with an exclamation point next to it, and click on the corresponding link.

For each of these red sections, scroll down to read your Provider Manager's feedback, and do one of the following:

- a. If you need to fix something on the form itself, click the "Edit" button, update the course registration as requested for the fields noted in red, and click the "Save" button.
- b. If you need to update a promotional website or attachment, click the "Edit" and "Save" buttons on the section, and then make the requested changes on your documentation. If your documentation is an attachment, be sure to upload your updated document on the Attachments section.

As you Save each section, the section status should flip from "Additional Information Requested" to "Complete."

Once all sections have either the "Accepted" or "Complete" status, return to the *Course Overview* page, and you should see that the "Submit to ASHA" button is activated, which means that you are ready to resubmit your course. If the "Submit to ASHA" button is not activated, please contact your Provider Manager.

Reporting

A participant has given me an ASHA ID number that doesn't match the usual eight-digit number format.

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Remember, all ASHA ID numbers have exactly eight numerical characters in them. For some, their ASHA ID number may start with one to three leading zeros that will drop when entered into the Excel template. This situation is fine, as our software will fill those zeros back in. However, if your participant enters an ASHA ID with any of the following, it can cause major errors that prevent us from processing the file:

- inclusion of more than eight numbers
- inclusion of any letters
- inclusion of symbols or other non-numeric characters

If a learner provides an ASHA ID number with any of the above three problems, do your best to reach out to the learner to get an updated/corrected ASHA ID. If you cannot get in touch with the learner in time for you to comfortably report, then please leave the ASHA ID field blank on the Excel template.

I am having trouble attaching my Excel file for reporting.

Try the following steps:

1. **Make sure the Reporting file is not currently open elsewhere on your computer.** Most internet browsers will not allow an attachment to be uploaded if they are open in another program.
2. **Check the internet browser you are using.** The Portal works best with Microsoft Edge or Google Chrome, so you may need to switch browsers.
3. **Check the file format of your attachment.** The Reporting module accepts only .xls and .xlsx file types. Any other file types—including .csv files—cannot be uploaded in the Reporting module.
4. **Clear your internet browser's cookies/browsing cache, then restart your browser.** Some browsers work differently than others, so review your browser's Help/Support sections for more details on this step (search "how do I clear my cache?").
5. **Copy or download the file to your home/desktop folder and upload from there.** If the file is on a shared/network drive, your internet browser may not be able to read it. Even if the file is on your local machine, there may be file or directory permissions that prevent the browser from reading the file from its current location.
6. **If the above steps do not work, email your Accounts Manager for assistance.** Please include A) a quick list of troubleshooting steps you have already tried and B) any screenshots (or even a screen recording) of what you are attempting to do and the result you are getting—these can help us identify the issue much more quickly!

How do I know which rosters I have reviewed?

There is currently no built-in functionality that allows Continuing Education Administrators (CEAs) to track which rosters have and have not been reviewed in the CE Provider Portal. Beyond creating your own tracking document/process, however, a Participant Listing can be generated through the Custom Reports section. This list shows all participants that have been posted to their respective course offering within any selected date range, which can be helpful when needing to review lots of rosters at once. Please follow the steps below to generate a Participant Listing:

1. In the Portal, select the "Custom Reports" link on the right of the Portal navigation ribbon.

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2. Under “Select a custom report,” click to open the dropdown menu.
3. Select the “Participant Listing” report.
4. Enter the date range of Offering End Dates for offerings you’d like to review.
5. Click “Create Custom Report.”
6. An Excel file should automatically download (make sure you allow pop-ups for asha.org).
7. Open the file to access the information—you can now use Excel’s advanced sorting and filtering functionality, clear or highlight rosters that you’ve already reviewed, and even run macros on the data to make this process easier!