

CE Self-Tracker – Reference Guide

About this Guide:

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

Understanding the CE Self-Tracker

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Continuing Education

This CE Self Tracker helps you track your continuing education credits. Failure to complete CE credits may result in disciplinary action.

Click [here](#) for a step-by-step instruction manual on how to use the Self-Tracker.

Summary

This is a summary of CE credits you have completed and credits outstanding based on the CE information you have entered into the Self-Tracker.

Licence Period	Required CE Credits	Completed CE Credits	Remaining CE Credits	CE Credits available for Carryover
June 1, 2021 – May 31, 2022 General Licence	8	4	4	0

List

Courses you have entered into the CE Self-Tracker is listed below. Click on Edit to view and modify the course information you have entered.

[Download/export selected](#) [Delete selected](#)

<input type="checkbox"/>	Licence Period	Course Provider	Course Name				
<input type="checkbox"/>	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 1	Sample Course Title 1				
<input type="checkbox"/>	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 2	Sample Course Title 2				
<input type="checkbox"/>	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 3	Sample Course Title 3	1	2021-07-09	Edit	Delete
<input type="checkbox"/>	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 4	Sample Course Title 4	1	2021-07-29	Edit	Delete

Required CE Credits:
Number of CE credits required per licence period.

Completed CE Credits:
Number of CE credits you've entered into the tracker.

Remaining CE Credits:
Number CE credits you still need to complete for the licence period.

CE Credits available for Carryover: Number of CE credits you can allocate as carry over credits to the next licence period.

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Entering your CE Information

Step 1: Go to the Online Portal.

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



Step 2: Enter your Login Information.

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[Register for an Account](#) [Login](#)

Insurance Council of BC Online Portal

Our online portal provides access to various Insurance Council of BC services. Currently, users can login to do the following:

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

User Name or E-mail:

Password:

[Login >](#)

Remember me on this computer

[I've forgotten my password](#)

New Users:

[Register for an Account](#)

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

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I want to ...

Licences <ul style="list-style-type: none">Apply for a personal licenceComplete my annual filingView my licence record(s)Manage my applicationsView/Print my receiptsView/Print my licence certificate	Exams <ul style="list-style-type: none">Register/Manage my LLQP examsConfirmation of Online LLQP ExamsView my exam confirmation letterView my exam resultsView/Print my receipts	Contact Information <ul style="list-style-type: none">Update my portal login informationChange my passwordUpdate my contact information
3 Manage my Continuing Education <ul style="list-style-type: none">CE Self-Tracker		

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

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My Continuing Education Self-Tracker

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

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

Instructions:

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

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

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[Proceed to CE Self-Tracker](#)

Questions about the CE Self-Tracker?

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

Step 5: Click on 'Add New'.

Continuing Education

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

Summary

This is a summary of CE credits you have completed and credits outstanding based on the CE information you have entered into the portal.

Licence Period	Required CE Credits	Completed CE Credits	Remaining CE Credits	CE Credits available for Carryover
No courses found.				

List

Courses you have entered into the CE Self-Tracker is listed below. Click on Edit to view and modify the course information you have entered.


Download/export selected Delete selected

5 **Add New**

Enter keyword to filter list

<input type="checkbox"/>	Licence Period	Course Provider	Course Name	Completed CE Credits	Completion Date	Action
No courses found.						

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

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

The screenshot shows the 'Continuing Education Information' form with the following fields highlighted by letters A through J:

- A**: Licence Period (dropdown menu)
- B**: Course Provider (dropdown menu)
- C**: Course Provider Name (text input)
- D**: Course Title (text input)
- E**: Category (dropdown menu)
- F**: CE Credits (text input)
- G**: URL for course description/outline (text input)
- H**: Please describe how this course meets the CE requirements? (text area)
- I**: Completion Date (calendar icon)
- J**: Delivery Method (dropdown menu)

Buttons for 'Save' and 'Cancel' are visible at the bottom of the form.

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

Continuing Education

Course 'Sample Course Title 4' saved successfully!

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Click [here](#) for a step-by-step instruction manual on how to use the Self-Tracker.

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List

[Add New](#)

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[Download/export selected](#) [Delete selected](#)

Enter keyword to filter list

<input type="checkbox"/>	Licence Period	Course Provider	Course Name	Completed CE Credits	Completion Date	Action
<input type="checkbox"/>	June 1, 2021 - May 31, 2022 General Licence	Sample Course Provider 1	Sample Course Title 1	1	2021-08-03	Edit Delete
<input type="checkbox"/>	June 1, 2021 - May 31, 2022 General Licence	Sample Course Provider 2	Sample Course Title 2	1	2021-07-15	Edit Delete
<input type="checkbox"/>	June 1, 2021 - May 31, 2022 General Licence	Sample Course Provider 3	Sample Course Title 3	1	2021-07-09	Edit Delete
<input type="checkbox"/>	June 1, 2021 - May 31, 2022 General Licence	Sample Course Provider 4	Sample Course Title 4	1	2021-07-29	Edit Delete

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

Editing/Deleting Entries

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

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

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Continuing Education

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[Download/export selected](#) [Delete selected](#)

Add New

Enter keyword to filter list

<input type="checkbox"/>	License Period	Course Provider	Course Name	Completed CE Credits	Completion Date	Action
<input type="checkbox"/>	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 1	Sample Course Title 1	1	2021-08-03	Edit Delete
<input type="checkbox"/>	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 2	Sample Course Title 2	1	2021-07-15	Edit Delete
<input type="checkbox"/>	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 3	Sample Course Title 3	1	2021-07-09	Edit Delete
<input type="checkbox"/>	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 4	Sample Course Title 4	1	2021-07-29	Edit Delete

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

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[Download/export selected](#) [Delete selected](#)

Add New

Enter keyword to filter list

<input type="checkbox"/>	License Period	Course Provider	Course Name	Completed CE Credits	Completion Date	Action
<input type="checkbox"/>	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 1	Sample Course Title 1	1	2021-08-03	Edit Delete
<input type="checkbox"/>	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 2	Sample Course Title 2	1	2021-07-15	Edit Delete
<input type="checkbox"/>	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 3	Sample Course Title 3	1	2021-07-09	Edit Delete
<input type="checkbox"/>	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 4	Sample Course Title 4	1	2021-07-29	Edit Delete

Exporting your CE Information

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

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June 1, 2021 – May 31, 2022 General Licence	8	3	5	0

List

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[Download/export selected](#) [?](#) [Delete selected](#) [?](#)

[Add New](#)

Enter keyword to filter list

1

<input type="checkbox"/>	Licence Period	Course Provider	Course Name	Completed CE Credits	Completion Date	Action
<input checked="" type="checkbox"/>	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 1	Sample Course Title 1	1	2021-08-03	Edit Delete
<input checked="" type="checkbox"/>	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 2	Sample Course Title 2	1	2021-07-15	Edit Delete
<input checked="" type="checkbox"/>	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 3	Sample Course Title 3	1	2021-07-09	Edit Delete

Step 2: Click 'Download/export selected'.

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[Download/export selected](#) [?](#) [Delete selected](#) [?](#)

[Add New](#)

Enter keyword to filter list

2

<input type="checkbox"/>	Licence Period	Course Provider	Course Name	Completed CE Credits	Completion Date	Action
<input checked="" type="checkbox"/>	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 1	Sample Course Title 1	1	2021-08-03	Edit Delete
<input checked="" type="checkbox"/>	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 2	Sample Course Title 2	1	2021-07-15	Edit Delete
<input checked="" type="checkbox"/>	June 1, 2021 – May 31, 2022 General Licence	Sample Course Provider 3	Sample Course Title 3	1	2021-07-09	Edit Delete

Step 3: Go to 'Downloads' on your computer to open the excel document.