Guide to Using the Online System

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IMPORTANT NOTES:

- When using the online system, any application that requires a fee will not be received by us if you do not complete the payment process.

- After clicking 'Submit Application' you will be taken to the Confirmation page. You may see a message that your application is submitted but not considered complete. This is standard language just to let you know it is not considered complete until staff reviews it. If you've completed the application and uploaded any required documentation, you can **Logout** at this point.

Basic How To's:

1) How to Apply for a New Certification or Registration:
On the main page for the online system, click the link for a **First Time Applicant** and follow the instructions accordingly from there. You must pay the application fee as well.

2) How to Apply to Renew:
Login to your online profile and click the **Renew** link on the **What Do You Want to Do** menu of your home page.

3) How to Apply for CE Approval:
Login to your online profile and click the **CE Approval Request** link on the **What Do You Want to Do** menu of your home page. Note: If the course is already approved (i.e., it already has a JBCC program #), you do not have to apply for CE approval.

A course outline must be submitted with each request for approval as well as copies of the speaker bios. The course outline must contain the following information:

a. Describe course content (i.e., detailed description of each session of the program)
b. Indicate the time allotted to each segment (i.e., the start and end time of each session of the program

for in-person courses or using quarter hour increments for online courses).
c. The date and location of the course
d. Any special category sessions must be clearly identified on the outline as well (i.e., Ethics, TX Rules, or Legislative Update).

If you have multiple resumes to submit, please upload them as one complete file versus multiple individual files file. For example, scan and upload them as one complete pdf file.

When entering the course location, you must do the following:

- For online courses, enter the website in the "**Course Location**" and "**Web Address**" fields. Leave the City, State, and Zip fields blank.
- For all other courses, enter the location (i.e., City/State) in the "**Course Location**" field. Leave the City, State, and Zip fields blank.

4) **How to Apply for an Exam** (Court Interpreters, Court Reporters, or Guardians only):

First-Time Applicants (those who have not applied with us before):
A) Create your online profile following the instructions in section I of this guide.
B) Go to your profile home page and click the **Apply for Exam** link on the **What Do You Want to Do** menu. Follow the instructions accordingly from there.

Existing Applicants (i.e., those who've applied with us before):
Login to your online profile and click the **Apply for Exam** link on the **What Do You Want to Do** menu of your home page. Follow the instructions accordingly from there.

5) **How to Apply to Change your Name:**
Login to your online profile and click the **Change Name** link on the **What Do You Want to Do** menu of your home page.

6) **How to Update your Contact Information:**
Login to your online profile and click the **Update Profile** link on the **What Do You Want to Do** menu of your home page.

I. REGISTERING AN ACCOUNT

Existing Licensees:

You must use the activation code we issued to register an account. If you did not receive one, and you are **not a new applicant, please email us to receive your code.

1) Go to our online system
2) In the "**Existing Certification**" section, click on the "**Click Here**" link
3) In the "**Program**" field, select your certification program *(i.e., Court Reporter, Court Interpreter, Guardian, or Process Server)*
4) Select "**Individual**" in the '**Entity Type**' field (for individual licensees) **or** "**Business Entity**" (for court reporting firms)
5) Enter your certification/file# in the "**Certification #**" field **or** Enter your last name in the "Last Name" field. (Note: do not enter your number **and** your last name. You must choose one or the other.)
6) Enter your activation code in the "**Activation Code**" field
7) Click '**Next**' to go to the User Registration page
8) Update your contact information (if it is not current)

9) In the "Online Account Information" section, type in the **Login Name** and **Password** you want to create for your account
10) Click "**Regist**er", then you'll be taken to the Home page of your account.

First-Time Applicants

1) Go to our online system
2) In the "**First Time Applicant**" section, click on the "**Click Here**" link to apply for a new certification.
3) On the "**Initial User Registration**" page, enter all required fields (i.e., name, DOB, address, etc.)
4) In the "Online Account Information" section, type in the **Login Name** and **Password** you want to create for your account
5) Click "**Regist**er", then you'll be taken to the application for certification preliminary step page. Provide all requested information on this page, then click **Next** to be taken to the actual application for certification
6) Complete all pages of the application (i.e., each tab of the application). When you get to the last page, the attestation page, click **Submit Application** to be taken to the payment portal and pay the application fee. Click **Pay Now** and follow the instructions accordingly from there. After you've paid, you'll be redirected to the confirmation page of the application. At this point, you can view/print your application summary and your payment receipt if you choose. (Note: this is the only chance you'll have to view/print these items.)

II. TRACK STATUS/CONFIRM RECEIPT/SEE UPLOADED DOCUMENTS:

1. Login to your account
2. Under the '**What do you Want to Do**' menu, click on '**View Pending Online Applications**'.
3. When you get to the list of pending online apps, click on the '**View Details**' link of the application you want to check.
4. You will see any non-mandatory attached documents *(i.e., Additional Supporting Documents)* in the "**View/Attach**" column. To see any mandatory documents, click on the "**Mandatory Required Document(s)**" link.
   Note (0)= nothing attached (1)=1 document attached
5. You will see your application status in the "**Current Step**" of the '**Application Details**' section.

III. SEARCH FOR LICENSEES:

- Near the bottom, on the left side of the screen (under the USER LOGIN section), you will see "**SITE LINKS**"
- The very first item under Site Links says, "**To Search for Certified Court Reporter or a Reporting Firm: Click Here**" *(**Note:** this language will reflect the certification program you are in, such as Licensed Court Interpreter, Certified Guardians, or Certified Process Server.)*
- Click on the '**Click Here**' link
- In the "**Program**" field select your certification program
- In the '**Entity Type**' field, select '**Individual**' for (Court Reporters, Court Interpreters, Guardians, or Process Servers) or '**Business Entity**' for Court Reporting Firms.
- You can search by name, certification # (in the Certification # field), or certification type
- If you click on the "**(+)**" by Address Information, you can also search by City, County, Zip, or phone #
- Once you've established your criteria, click '**Search**'

Note(s):

- If you do not know who you are searching for, if you just want to see everything, press "**Search**" to see what comes up.
- Also, you can generate a list in Excel format by clicking on the '**Generate Excel**' button. You can save the excel and sort to your liking.

IV. SEARCH FOR APPROVED CONTINUING EDUCATION COURSES:

- Near the bottom, on the left side of the screen (under the USER LOGIN section), you will see "**SITE LINKS**"
- The very first item under Site Links says, "**To search for an approved Continuing Education Course for Court Reporter: Click Here**" (***Note:*** *this language will reflect the certification program you are in, such as Licensed Court Interpreter, Certified Guardians, or Certified Process Server.)*
- Click on the '**Click Here**' link
- In the "P**rogram**" field select your certification program
- You can search by course title, provider name, dates offered, or Type.
- Once you've established your criteria, click '**Search**'

Note(s):

- If you do not know what you are searching for, or if you just want to see everything in the system, press "**Search**" to see what comes up.
- Any time you cannot find it by the course name, try by the provider name and that should pull up anything approved for that provider. You can scroll through the list to find the course you need and select from that point.
- Whenever you are searching a system (be it a database, spreadsheet, or google), sometimes you must tweak how you're searching. For example, if you're looking for a seminar called "*ABC's of Court Reporting*" presented by "*Cinderella's CE Seminars of Texas*", but you can't find it by name, try a partial search of the name of the course (i.e., "*Cinderella's*"), or a partial name of the provider (i.e., "*ABC's*") and don't enter anything else (i.e., no dates, etc.). Sometimes less is more.
    - For example, enter just the first word of the course title in the **Course Title** field. **Leave all other fields blank** and hit **Search**.

V. ORDER REPLACEMENT CERTIFICATION CARD/ WALL CERTIFICATE:

1. Login to your account
2. Under the '**What do you Want to Do**' menu, click on '**General Fee Remittance**'
3. Click on the item you are ordering (i.e., card or certificate)
4. Click '**Next**'
5. Enter/verify all requested information on the '**Personal Information**' tab
6. Click '**Next**'
7. Verify/update any changes on the '**Address Information**' tab
8. Click '**Next**'
9. Under the 'Issue Copy' column on the '**Certification Information**' tab, select Yes or No (to indicate whether or not you want a copy of the card/certificate sent to you in addition to the hard copy that will be mailed.)
10. Click '**Next**'
11. Read the Attestation page, then check the box by the declaration
12. Click '**Submit Application**'
13. On the '**Fee Detail**' page, click '**Pay Now**'
14. Complete the payment process. (NOTE: if you do not pay, we will not receive your application.)

VI. UPDATE NAME:

1. Login to your account
2. Under the '**What do you Want to Do'** menu, click on '**Change Name**'
3. Under the 'Application Type', make sure the "**Application for Updating Name on Certification**" is checked (i.e., is bulleted)
4. Click '**Next**'
5. Enter your new full legal name (last name, first name, and middle name)
6. Check the appropriate box indicating the reason for name change
7. To attach your documentation in the '**Mandatory Required Document(s)**' section, click on the '**Documents (0)'** link
8. Click '**Add**'
9. Click on '**Choose File**' to locate the file on your computer to be uploaded. Once you have selected your file, you will see it in the '**Document**' column.
10. Click '**Upload**' to attach it. (You should see '**Documents (1)**' to indicate 1 file was uploaded. You can see what was uploaded by clocking on the '**Documents (1)**' link.)
11. Read the Attestation page, then check the box by the declaration.
12. Enter your name in the '**Name**' field
13. Enter the Date in the '**Date**' field
14. Click '**Submit Application**'
15. After you submit your application you'll be taken to the Confirmation page. Note: You will only see your attachments if you click the "**Mandatory Required Document(s)**" link. The Documents link on the row for 'Additional Supporting Documents' will show "(0) because no docs were attached using that link as no additional documents are required. You can logout at this point.

VII. UPDATE CONTACT INFORMATION:

1. Login to your account
2. Under the '**What do you Want to Do'** menu, click on '**Update Profile**'
3. Update all of your contact information
4. Click '**Save'**
5. **Logout**

VIII. REPORT CE/UPLOAD CERTIFICATES ON THE 'EDUCATION DETAIL' PAGE OF RENEWAL APPS:

1. Click '**Add**'
2. A "**Course Detail and Information**" page will open, on this page, click on the "**Click Here**" link next to '**Course Title**' to choose the course you took.
3. After you click on the '**Click Here**' link, a "**Course Search**" screen will come up. You can search for your course by typing in the name of the course, **or** the name of the provider **or** course name **and** provider name without entering the date you took the course.
4. Click '**Search**' to locate your course on the date you took it, or within the date range of when you took it). **Note:** see section **IV** of this guide for tips on searching for approved CE courses.
5. When you find your course, just click on the name of it to select it.
6. Once the course has been selected, you'll be back on the '**Course Detail and Information**' page.
7. Enter the date you completed the course in the '**Completion Date**' field.
8. Click '**Save**', then you'll be taken back to the '**Education Detail**' page.
9. (Repeat the steps above if you have multiple courses to add)

10. In the "**Course Certificate**" column on the '**Education Detail**' page, click on the "**Course Certificate (0)**" link to upload your certificates. The '**Document Upload**' page will come up.
11. Click on '**Add**'
12. Click on '**Choose File**' to locate the certificate on your computer to be uploaded. Once you have selected your file, you will see it in the '**Document**' column.
13. Click '**Upload**' to attach it. Once attached you'll be back on the '**Education Detail**' page. (Repeat steps above for each course you added.)
14. Once all have been uploaded, click '**Next**' to move on to the next step in the application process.

IX. ATTACH DOCUMENTS TO A PENDING APPLICATION:

1) Login to your account
2) Under the '**What do you Want to Do'** menu, click on '**View Pending Online Application(s)**'.
3) When you get to the list of pending online apps, click on the '**View Details**' link for your application.
4) For non-mandatory documents, click on the '**Document(s)**' link in the '**View/Attach**' column.
5) For mandatory documents, click on the '**Mandatory Required Document(s)**' link, then click on the '**Documents (0)**' link in the '**Document(s)**' column.
6) It'll take you to the '**Upload Document**' page to upload your document(s).
7) Click on '**Add**'
8) Click on '**Choose File**' to locate the file on your computer to be uploaded. Once you have selected your file, you will see it in the Document column.
9) Click '**Upload**' to attach it. (You should see "**Documents (1)**" to indicate 1 file was uploaded. You can see what was uploaded by clocking on the "**Documents (1)**" link.)

X. APPLYING FOR COURSE APPROVALS (CONTINUING EDUCATION COURSE PROVIDERS):

Providers Applying for Approval in the System for the First Time (i.e., those who've yet to create a profile)**:**

- Near the bottom of the page, just above the credit card icons, you'll see "**If you are a Continuing Education Course provider and need a course approval: Click Here**"
- Click on the '**Click Here**' link.
- Enter your provider name, address, phone #'s, emails, etc. (i.e., all fields with * next to them).
- Enter the **Login Name** and **Password** you want to create for your provider account.
- Click '**Register**' and follow any additional prompts from there.

Providers Already Registered in the System Applying for Approval (i.e., those who have a profile already)**:**

- Login to your existing online profile
- On the **What Do You Want To Do** menu of your home page, click **CE Approval Request** and follow the instructions accordingly from there.

A course outline must be submitted with each request for approval as well as copies of the speaker bios. The course outline must contain the following information:

a. Describe course content (i.e., detailed description of each session of the program)
b. Indicate the time allotted to each segment (i.e., the start and end time of each session of the program

for in-person courses or using quarter hour increments for online courses).
c. The date and location of the course
d. Any special category sessions must be clearly identified on the outline as well (i.e., Ethics, TX Rules, or Legislative Update).

When entering the course location, you must do the following:

- For online courses, enter the website in the "**Course Location**" and "**Web Address**" fields. Leave the City, State, and Zip fields blank.
- For all other courses, enter the location (i.e., City/State) in the "**Course Location**" field. Leave the City, State, and Zip fields blank.

Note: To confirm receipt and track the status of your applications, you must submit click on **View Pending Online Application(s)** on the **What Do You Want To Do** menu of your home page.

XI. UPLOADING COURSE APPROVAL DOCUMENTATION

CE APPROVAL APP NOTES FOR PROVIDERS AND LICENSEES:

- The only documentation to submit for course approvals are 1) the course outline, and 2) the speaker bios. No other documents should be submitted *(i.e., do not submit course booklets, exams, slide shows, etc.)*

UPLOADING DOCS FOR CE APPROVAL:

1) In the '**Mandatory Required Document(s)**' section,
2) click on the '**Documents (0)**' link in the '**Document(s)**' column.
3) It'll take you to the '**Upload Document**' page to upload your document(s).
4) Click on '**Add**'
5) Click on '**Choose File**' to locate the file on your computer to be uploaded. Once you have selected your file, you will see it in the Document column.
6) Click '**Upload**' to attach it. (You should see "**Documents (1)**" to indicate 1 file was uploaded. You can see what was uploaded by clocking on the "**Documents (1)**" link.)

Repeat these steps for Items 1 (Course outline) and 2 (Speaker resumes/credentials)

XII. HOW TO WITHDRAW AN APPLICATION (only for applications that have yet to be submitted):

1) Login to your profile/account
2) Under the '**What do you Want to Do'** menu, click on '**View Pending Online Application(s)**'.
3) When you get to the list of pending online apps, click on the '**Withdraw**' link for your application in the '**Action**' column.
4) You'll get a pop up box asking if you are sure you want to withdraw the application, click '**OK**'.
5) Logout of your profile/account

XIII. RESET FORGOTTEN PASSWORD or RETRIEVE FORGOTTEN LOGIN NAME:

1) Go to the main page of our online system
2) Next to the **Login** button, click on the **Forgot Login/Password** link

3) For ‘**Entity Type**’, select ‘**Individual**’ (for licensees) or ‘**Business Entity**’ (for court reporting firms)
4) Select your program *(i.e., Court Reporter, Court Interpreter, Guardian, or Process Server)*
5) Enter your CSR or CRF # in the ‘**Certification #**’ field **or** enter your Login Name in the ‘**Login Name**’ field.
6) Enter your email address in the ‘**Email**’ field
7) Click ‘**Retrieve Login/Password**’ button
8) You get a message saying your information has been sent to your email address.
9) Retrieve the forgotten information (reset password link) from your email
10) When you click on the link in your email, you’ll be taken the page to enter a new password (twice), you will also see your login name on this page.
11) Click ‘**Save**’, then you’ll be on the main page again. Enter your login name and new password
12) Click ‘**Login**’

XIV. REQUEST REGRADE OF COURT REPORTER EXAM:

1. Login to your account
2. Under the ‘**What do you Want to Do**’ menu, click on ‘**General Fee Remittance**’
3. Click on **‘Exam Regrade’**
4. Click ‘**Next**’
5. Enter/verify all requested information on the ‘**Personal Information**’ tab
6. Click ‘**Next**’
7. Verify/update any changes on the ‘**Address Information**’ tab
8. Click ‘**Next**’
9. Enter the exam date on the **‘Questions’** tab,
10. Click ‘**Next**’
11. Read the Attestation page, enter your name, enter the date, then check the box by the declaration
12. Click ‘**Submit Application**’
13. On the ‘**Fee Details**’ page, click ‘**Pay Now**’
14. Complete the payment process. (NOTE: if you do not pay, we will not receive your application.)

XV. MAKING EXCEL LIST OF LICENSEES SORTABLE

After opening the search results Excel spreadsheet, unwrapped the cells by:

1. Selecting the entire spreadsheet by clicking on the cell located to the complete left, just to the left of column A and above the number 1.
2. Right click, select Format Cells
3. Under the Alignment tab, uncheck Wrap Text
4. Click OK

From there you should be able to maneuver the columns and sort as desired.