



Course Provider Application Process

Overview

Before applying to be a course provider, visit the [NMLS Course Provider Resources Page](#) for information on how to submit your application, submit courses for approval, and access other resources. You can also find the following on the Course Provider Resources page:

- **User Guides** – provide detailed step-by-step instructions about how to complete every NMLS business process.
- **Policy Documents** – provide specific information on NMLS policies pertaining to such things as provider and course approval, course formats, credit banking, marketing standards, etc.
- **Functional Specification** – provides detailed technical information about how course must be constructed to satisfy conditions for approval.
- **Education Notices** - provide guidance about how to satisfy SAFE Act, CFPB or state agency education requirements.

The provider application process involves three steps:

Step 1: Prepare Required Documentation

Step 2: Submit the Online Application to the Education Management System

Step 3: Upload the Required Documents to the NMLS Course Approval Portal

If you encounter a problem during the application process, contact nmls.ed1@csbs.org.

Prepare Documentation

Certain materials must be submitted to NMLS for review as part of the course provider application process. The following documents must be uploaded:

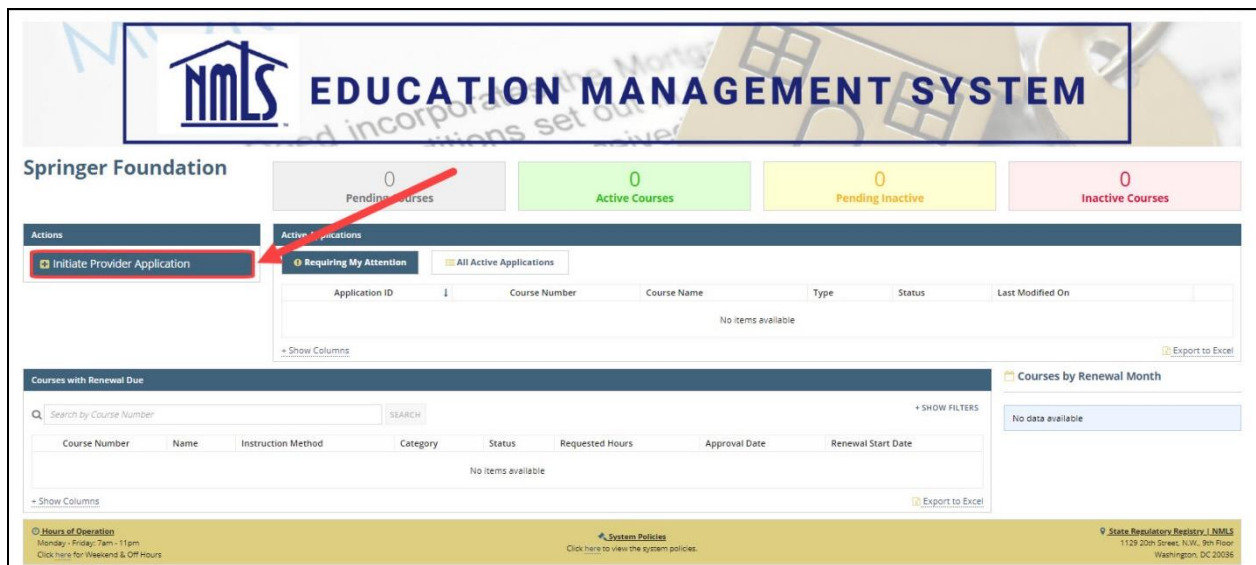
1. [Provider Application Checklist](#)
2. **Organization Structure and Ownership**
 - Organization chart naming the owners, principals, and investors. Highlight positions that will support NMLS approved education and explain their role.
 - Resumes of the owners, principals, and investors.
 - Current business license or another document that shows that you are authorized to do business.
 - Organization changes from the past five years listed in chronological order
3. **E-Commerce Policies and Procedures**
 - Privacy Policy
 - Refund Policy
 - Course Cancellation Policy

4. Education Administration Policies and Procedures

- Registration
- Attendance
- Instructor hiring practices and policy
- NMLS Rules of Conduct for Students (ROCS); issuance and retainment
- End of course surveys as it relates to dissemination, collection, review, and response
- Data and document retention policy
- Course completion certificate example

Submit Application to the EMS

1. Navigate to the [Education Management System](#).
2. Click the **New Course Provider? Click here to register** link.
3. Register your account.
4. Log into the EMS with your new username and the temporary password emailed to you.
5. Click the **Initiate Provider Application** button in the left navigation panel.



6. Enter your Business Demographic Information and click the **Next** button when done.
7. Answer the application questions and click the **Next** button when done.
8. Review the *Standards of Conduct for Approved Course Providers*.
9. Click the **Add Signature** button to sign and confirm that you have read and agree to the *Standards of Conduct*, then click the **Next** button when done.

Course Provider Application

Business Demographic Information Application Questions **Attestation** Confirmation Payment/Submission

Standards of Conduct Attestation

Please carefully read the NMLS Course Provider Standards of Conduct, and enter your first and last name as an electronic signature to affirm that you have read and agree to the NMLS Course Provider Standards of Conduct.

STANDARDS OF CONDUCT FOR APPROVED COURSE PROVIDERS
 Approved February 4, 2010
 By the Mortgage Testing and Education Board
 acting on behalf of
 State Regulatory Registry LLC (SRR) and Nationwide Mortgage Licensing System and Registry (NMLS)

It is the intent of NMLS to have all Approved Course Providers promote themselves and their course offerings in accordance with the highest ethical standards. As such, NMLS approval status is granted with the understanding that Course Providers will maintain the Standards of Conduct listed below. Additionally, Approved Course Providers are required to operate in accordance with NMLS provider and course approval policies to include:

- *Policy on Criteria for Granting Approval for a Course to Become NMLS Approved* - Initially published June 16, 2009
- *Policy on NMLS Approved Pre-Licensure and Continuing Education Classroom Formats and Standards* - Initially published June 16, 2009
- *Policy on Reporting (Banking of Student Credits)* - Initially published June 16, 2009
- *Approved Course Provider Standards of Conduct* - Initially published June 16, 2009 and updated March 25, 2014
- *Policy on Business Arrangements, Reselling, and Marketing of NMLS Approved Courses* - Initially published February 4, 2009 and updated January 1, 2018
- *Functional Specifications for All NMLS Approved Courses* - Initially published March 13, 2010 and as updated annually
- *NMLS Approved Course Data and Document Retention Policy* - Initially published May 16, 2013 and effective January 1, 2018

Violation of any of these policies could result in sanctions or disciplinary action up to and including loss of NMLS approval status as provided by the Administrative Action Procedures for S.A.F.E. II Education Requirements

[View Entire Policy](#)

* E-Signature [Add Signature](#)

PREVIOUS CANCEL SAVE DRAFT **NEXT**

10. Review your information entered to ensure accuracy and click the **Continue to Payment** button when done.

11. Enter your payment information and click the **Submit Payment** button.

12. Click the **Complete** button.

A confirmation email is sent to the registered email address when the application is complete. Contact nmls.ed1@csbs.org if you do not receive a confirmation by the following business day.

Upload Documents to the Course Provider Portal

An invitation to create a profile on Basecamp is sent within 24 to 48 hours (72 if you applied Friday-Sunday) of your application confirmation email.

If you have not received an invitation or link to Basecamp within the timeframe listed above, contact NMLS at nmls.ed1@csbs.org immediately. The approval process cannot begin until you upload the required documents into Basecamp.

1. Open the invitation and click the **Get Started** link.
2. Choose a username and password and click the **Create Account** button.
3. Log into your account.
4. Click the project link for your initial provider application in the Your Projects section.

NMLS Course Provider Portal

Firefly Professional Training — Course Provider

- File [Instructor and Business Description Document \(1\).docx](#) Uploaded by Jessica E. TODAY
- Message [Provider Renewal Due](#) Posted by Jessica E. TODAY
- Message [New Provider Application](#) Posted by Jessica E. Aug 17

Firefly Professional Training — App ID 222222 - 8 Hour SAFE Comprehensive

- File [Syllabus.docx](#) Uploaded by Jessica E. TODAY
- File [CaseStudy.docx](#) Uploaded by Jessica E. TODAY
- File [ApplicationForm.docx](#) Uploaded by Jessica E. TODAY
- File [Presentation.pptx](#) Uploaded by Jessica E. TODAY
- Message [NMLS Course Application Project Ready](#) Posted by Jessica A. TODAY

Firefly Professional Training — Renewal ID 1111 (101010) 20 Hour SAFE Comprehensive

- Message [Application Project Ready](#) Posted by Jessica E. TODAY
- File [Syllabus.docx](#) Uploaded by Jessica E. TODAY
- File [CaseStudy.docx](#) Uploaded by Jessica E. TODAY
- File [ApplicationForm.docx](#) Uploaded by Jessica E. TODAY
- File [Presentation.pptx](#) Uploaded by Jessica E. TODAY

Your global feeds

- Global RSS Feed: Be notified about major activity across all your projects.
- Global Calendar: Get milestones from all your projects in a single iCalendar feed.

Managed with Basecamp.

Your projects

- App ID 222222 - 8 Hour SAFE Comprehensive
- Course Provider
- Renewal ID 1111 (101010) 20 Hour SAFE Comprehensive

5. Click the Files tab.

Back to Projects

Renewal ID 1111 (101010) 20 Hour SAFE Comprehensive Firefly Professional Training

Overview Messages To-Dos Calendar Writeboards **Files**

Project overview & activity

Provider Name: Firefly Professional Training
Format: OIL
Course Category: PE

TODAY

- Message [Application Project Ready](#) Posted by Jessica E.
- File [Syllabus.docx](#) Uploaded by Jessica E.
- File [CaseStudy.docx](#) Uploaded by Jessica E.
- File [ApplicationForm.docx](#) Uploaded by Jessica E.
- File [Presentation.pptx](#) Uploaded by Jessica E.

Managed with Basecamp.

Stay up to date on this project

- Turn on email updates to receive a daily digest notifying you of any to-do items or milestones that were added or completed in the last day.
- Project RSS feed (What's RSS?)

People on this project

NMLS

- Jessica Esquina
Latest activity 42 minutes ago
- Calley Moellman
Hasn't signed in recently
- Britton Anderson
Hasn't signed in recently
- Michelle Gallagher
Hasn't signed in recently
- SRR Staff
Hasn't signed in recently
- Michelle Vanderkaat
Hasn't signed in recently
- Richard Madison
Hasn't signed in recently

Firefly Professional Training

- Justice Spencer
You are currently signed in

6. Click the Upload a File button.

Back to Projects

Renewal ID 1111 (101010) 20 Hour SAFE Comprehensive Firefly Professional Training

Overview Messages To-Dos Calendar Writeboards **Files**

Files for this project

WEDNESDAY, 22 AUGUST 2018

- [Syllabus.docx](#)
by Jessica Esquina on 22 Aug. 11.4 KB - [Upload a new version](#)
- [CaseStudy.docx](#)
by Jessica Esquina on 22 Aug. 11.4 KB - [Upload a new version](#)
- [ApplicationForm.docx](#)
by Jessica Esquina on 22 Aug. 11.4 KB - [Upload a new version](#)
- [Presentation.pptx](#)
by Jessica Esquina on 22 Aug. 31.4 KB - [Upload a new version](#)

Managed with Basecamp.

Upload a file

Sort by

- Date and time
- A-Z
- File size

Categories

All files

Uploaded by

- Anyone
- Jessica Esquina

7. Choose the files for upload and select the checkbox labeled Britton Anderson.

Back to Projects
Renewal ID 1111 (101010) 20 Hour SAFE Comprehensive Firefly Professional Training

Overview Messages To-Dos Calendar Writeboards Files

Upload a file

Choose a file to upload
 No file chosen
Trouble attaching files? Switch to the [Basic Uploader](#)

Notify people via email

Firefly Professional Training Justice Spencer

All of NMLS

Britton Anderson Michelle VanderNaalt Richard Madison
 Cailey Moellman Michelle Gallagher SRR Staff
 Jessica Esquina

or

Managed with [Basecamp](#)

8. Click the **Upload the File** button.

Allow 14 business days from the upload date for your application to be reviewed and processed. If NMLS finds any issue with your application, you will be notified immediately by phone and email.

If your application has not been approved and 14 days have passed, contact NMLS at nmls.ed1@csbs.org.