How to Add the Education Roster Module to Your Industry Access Account
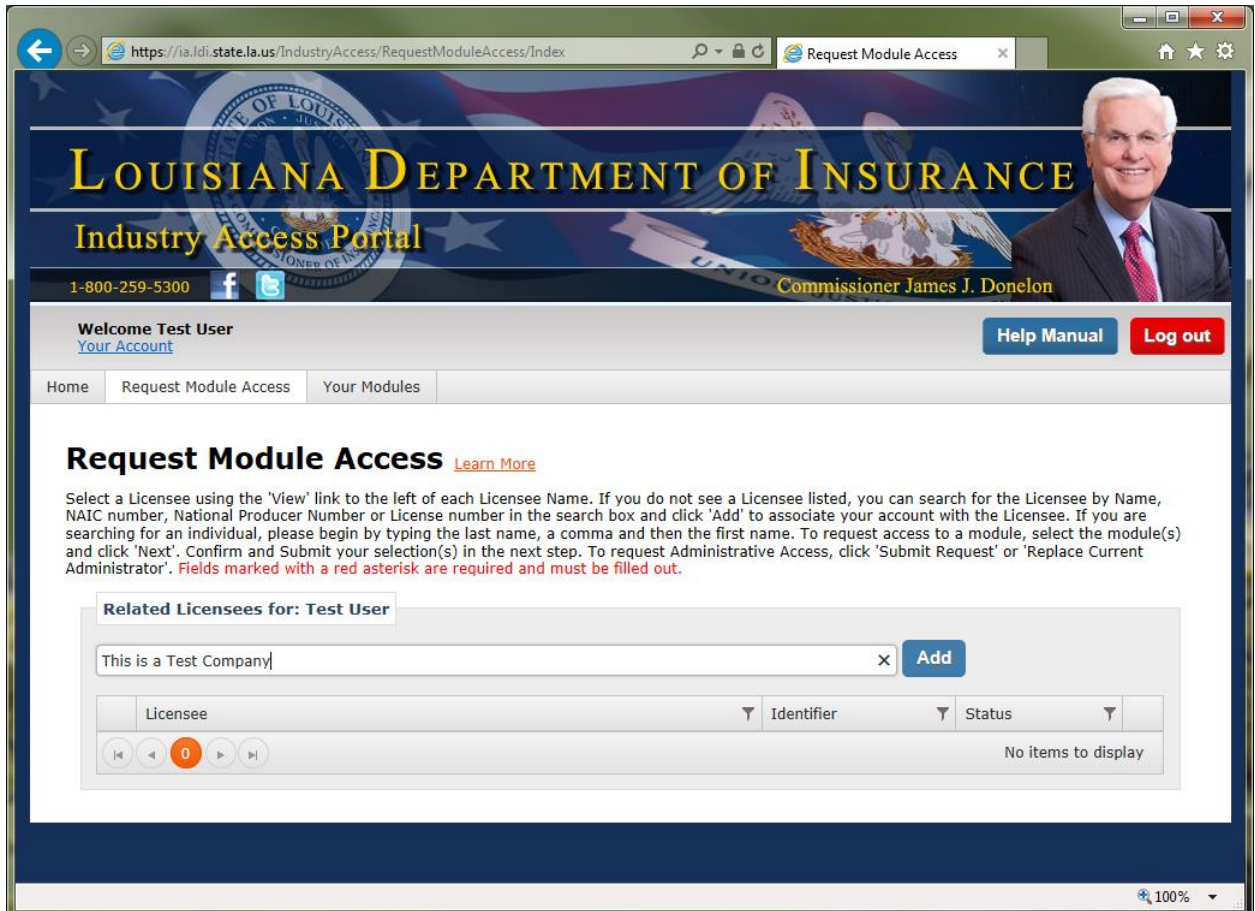
Please follow these steps to add the Education Roster Module to your existing account. If you do not have Industry Access, please visit https://ia.ldi.state.la.us/IndustryAccess/User/SignUp.

1. Log in to Industry Access and click "Request Module Access".
2. Search for the provider name by typing the provider name in the Search box. Once located, select the record and click "Add". This will add the name to the grid below the search box.

3. Click "View" next to the provider name. Below it will display two fields: "Administrator Information" and "Request Module Access"

- One individual from the provider will be the Administrator. If the individual is already the Administrator for the Agency's Producer/Adjuster Portal access, the addition of the Education Roster module will be approved automatically. The Administrator will be the primary user for the agency and will have the ability to grant access approval to other individuals who will make submissions on behalf of the agency. All requests for the Administrator role will come to the LDI for approval. The LDI recommends that the individual requesting Administrator role be someone listed as a contact with the LDI. Other individuals may request to be Administrator but approval may not be given until the LDI has verified that the requestor is authorized to submit affiliations on behalf of the provider.
- Confirmation of approvals will be sent by e-mail.

4. Under "Request Module Access", select "Education Roster" module.

5. You will be asked to confirm your selection. If the correct module appears in the white box, click "Submit Module Request."

How to Submit a Roster in Industry Access

Log in to Industry Access. From the "Your Modules tab, select "Education Roster Upload".

Rosters must be in an Excel spreadsheet in .xlxs format. (Excel versions 2007 or newer). A roster template is available on the module page for your convenience.   Data must be formatted in four columns in the following order:

1.   License Number

2. Last Name of Licensee (Note: the last name must match the last name of the licensee exactly as it is in LDI records. Omit any suffix such as Sr. or Jr.)
3. Course Number
4. Course Completion Date

Select the roster to import and Click "Submit CE Spreadsheet".

If the roster is accepted, you will receive on screen confirmation that the roster was successfully uploaded. If there are errors with the upload, you will also be notified onscreen of the error. Only spreadsheets which are error-free can be uploaded. You may either correct the entries containing the errors then re-submit the roster or you may choose to delete the problem record(s) to re-submit at a later time and continue with the records that are error free.

Troubleshooting Errors

Error	Solution
Spreadsheet contains no data or the first row is blank.	Verify that data columns are in the correct order. If not using the downloaded template, verify that your data begins on Row 1 of your spreadsheet
License number is not in the correct format in cell *xx*	Verify that the 1st column contains a valid license number.
License number is not a valid license number in cell *xx*	The number listed does not match a license number in LDI records. Please re-verify the individual's license number **
Last name field is empty in cell *xx*	Verify that this cell contains a licensee's last name
Last name field does not match name on record for given license number in cell xx	Verify the licensee's last name and license number. Verify that the name listed matches the licensee's name as it is on record with the LDI. Make sure that the last name does not contain a suffix If you have verified that last name is correct, the license number may not be the correct number for this licensee.**
Louisiana course number is not in the correct format in cell *xx*	Verify that this cell contains a valid Louisiana course number
Louisiana course number is not a valid Louisiana course number in cell *xx*	Verify that this cell contains a valid course number.
Course completion date is not in the correct format in cell *xx*	Verify that this cell contains a date.

Row *x*: This course number is not approved for the current provider	Verify that the course number entered is the correct course number.
Row *x*: This credit was previously submitted in the system	A completion for this course has already been reported. The licensee may have submitted the course to the LDI or it was already submitted on another roster. Duplicated submissions will not upload. Please delete this record from your roster.
Row *x*: A previously submitted credit exists in the system with available hours	The licensee's record contains a completion for the same course completed on an earlier date and the course is either being applied to the current CE period or the course was completed during the prior CE period and has unused hours that are being applied as carryover in this period. As a course may only be used once per renewal period this submission is considered a duplicated course and cannot be loaded. Please delete this record from roster.

** If you need assistance verifying names or license numbers, you can search for active licensees on the LDI website at https://www.ldi.la.gov/onlineservices/ProducerAdjusterSearch/