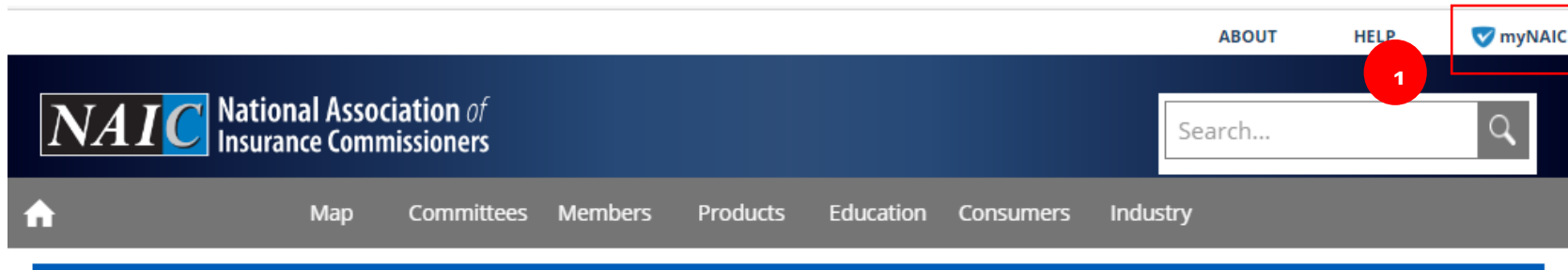


Designation Access – New Users



Access myNAIC

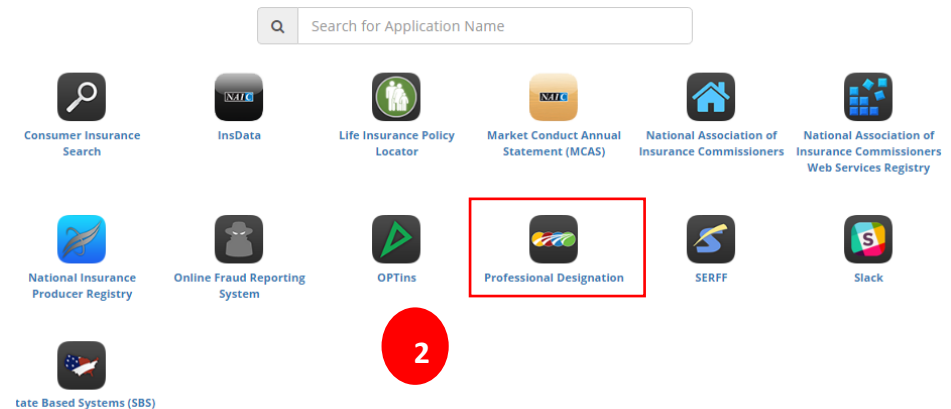
Go to www.naic.org



1. Click myNAIC
2. Click the Professional Designation icon

Public Applications

The applications displayed below are available for all users. Log in is not required. Individuals provided access by the NAIC for specific regulatory activities may access additional applications through "Login" above. Please contact help@naic.org with questions regarding these accounts.



Designation Access – New Users



Do you have an account

YES

I have an account and would like to sign in

NO

I would like to create a new account in Certemy

3

3. Select **No I would like to create a new account in Certemy**
(*Certemy – vendor for Designation program*)
4. Complete required fields
5. Click **CREATE ACCOUNT**

4

Complete Registration

First Name:

Last Name:

Email:

Password:

Confirm Password:

5

CREATE ACCOUNT

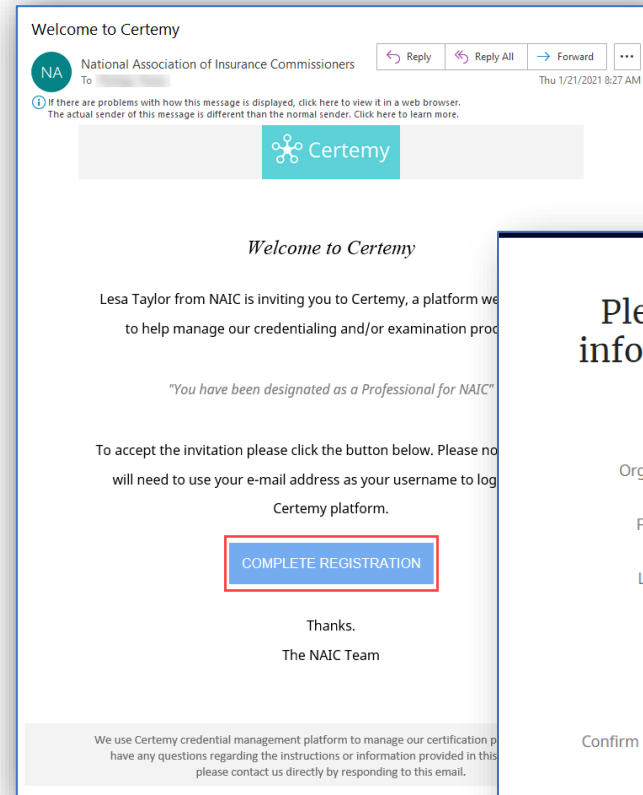
Check your email account for confirmation email to proceed with enrollment application

Designation Access – New Users



Welcome Email - Received

1. Open email
(*Certemy – vendor for Designation program*)
2. Click **COMPLETE REGISTRATION**
3. Complete all fields
 - **Organization**
 - **Email**
 - **Password**
 - Minimum eight characters
 - Upper case letters
 - Lower case letters
 - Numbers
 - Special characters
 - **Confirm Password**
 - **Industry** – select from drop-down list
4. Click to Accept Terms & Conditions
5. Click **CONTINUE**

A registration form titled "Please provide some additional information for your Professional profile". The form includes fields for Organization (pre-filled with "NAIC"), First name, Last name, Email, Password, and Confirm Password. There is also a dropdown menu for Industry, currently set to "Other". A checkbox labeled "I accept Terms & Conditions" is checked and highlighted with a red box, along with a "CONTINUE" button also highlighted with a red box.

Designation Candidate - Phase: Application



My Credentials: Left Panel: **Phase** and progress

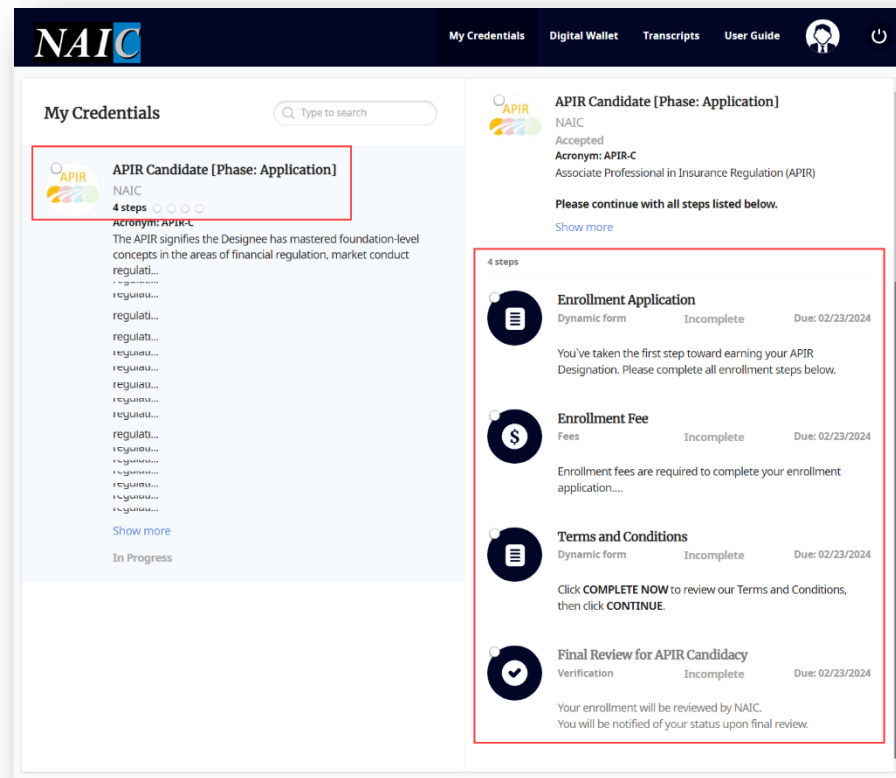
Right Panel: **Steps** to complete

- Key:
- Incomplete
 - In progress
 - Completed

Phase: Application

Complete All Steps:

- Enrollment Application
- Enrollment Fee
- Terms and Conditions
- Final Review for APIR Candidacy



Designation Candidate - Phase: Application



6. Use mouse or touchpad to Sign in box
7. Click **SUBMIT**
8. Click **CONFIRM**

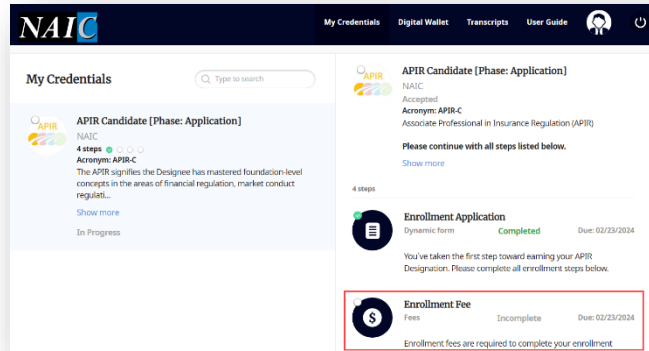
Note: Green dot with check confirms first step (*Enrollment Application*) Completed

Designation Candidate - Phase: Application



Enrollment Fee (required to complete enrollment application)

1. Click on **Enrollment Fee**

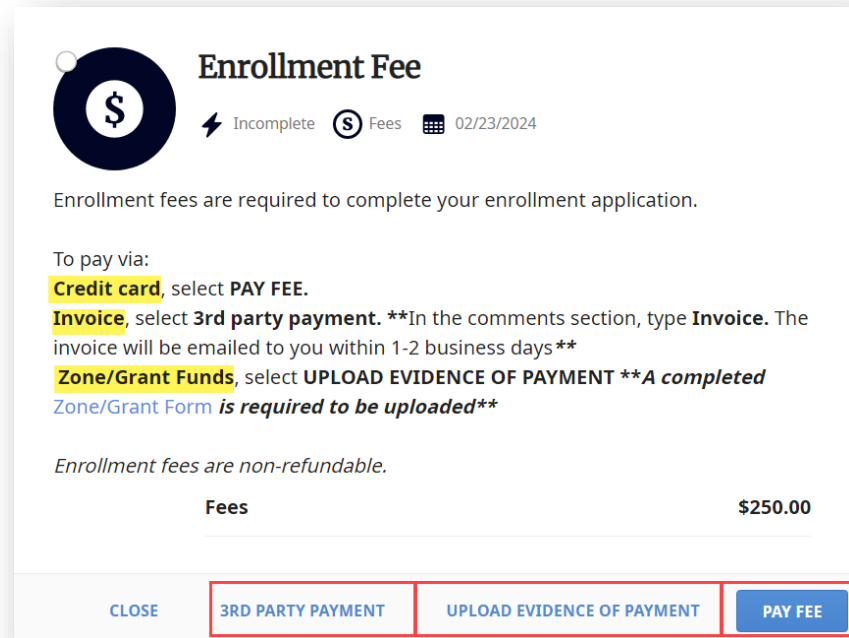
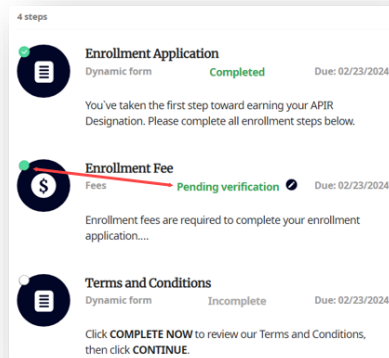


2. Determine payment type

- Credit Card: **PAY FEE**
- Invoice: **3RD PARTY PAYMENT**
- Zone/Grant Funds: **UPLOAD EVIDENCE OF PAYMENT**

Note: Invoice and Zone/Grant Funds option will show “**Pending verification**” until process completed by NAIC.

- Incomplete
- In progress
- ✓ Completed



Designation Candidate - Phase: Application



Credit Card: *(enrollment fees are non-refundable)*

1. Select **PAY FEE**

Enrollment Fee
⚡ Incomplete 🇺🇸 Fees 📅 02/23/2024

Enrollment fees are required to complete your enrollment application.

To pay via:
Credit card, select **PAY FEE**.
Invoice, select **3rd party payment**. **In the comments section, type **Invoice**. The invoice will be emailed to you within 1-2 business days**
Zone/Grant Funds, select **UPLOAD EVIDENCE OF PAYMENT** **A completed *Zone/Grant Form is required to be uploaded***

Enrollment fees are non-refundable.

Fees	\$250.00
------	----------

1

CLOSE 3RD PARTY PAYMENT UPLOAD EVIDENCE OF PAYMENT **PAY FEE**

2. Enter credit card information

- **Name on Card ***
- **Card *** (Number and expiration MM/YY)

3. Click **PAY \$250.00**

Enrollment Fee
⚡ Incomplete 🇺🇸 Fees 📅 02/23/2024

Enrollment fees are required to complete your enrollment application.

To pay via:
Credit card, select **PAY FEE**.
Invoice, select **3rd party payment**. **In the comments section, type **Invoice**. The invoice will be emailed to you within 1-2 business days**
Zone/Grant Funds, select **UPLOAD EVIDENCE OF PAYMENT** **A completed *Zone/Grant Form is required to be uploaded***

Enrollment fees are non-refundable.

Payment Amount

\$250.00

2

Name on card *
Cardholder Name

Card *
Card number MM / YY CVC

3

BACK CLOSE **PAY \$250.00**

Designation Candidate - Phase: Application



Invoice: *(enrollment fees are non-refundable)*

1. Select **3rd PARTY PAYMENT**

2. Type **Invoice** in **Comment *** box *(required)*
3. Click **Confirm**

Note: Invoice will be sent to Candidate's email. Must use NAIC's Account Manager and pay via Account Manager. If you do not have access, check with your State Mentor to help identify who has access for your State.

Designation Candidate - Phase: Application



Zone / Grant: *(enrollment fees are non-refundable)*

1. Select **UPLOAD EVIDENCE OF PAYMENT**

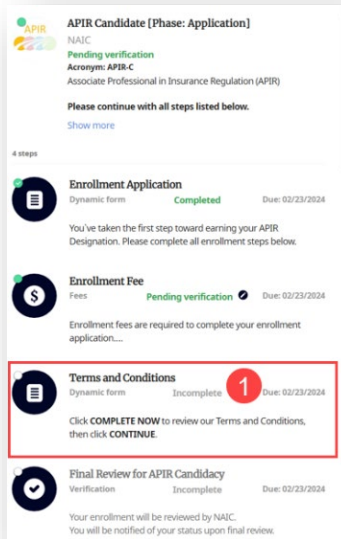
2. Click [Zone/Grant Form](#) link
Download and complete form

3. Drop file or use [Browse](#) link to attach completed form
4. Click **UPLOAD**

Designation Candidate - Phase: Application

Terms and Conditions

1. Click on **Terms and Conditions**
2. Click **COMPLETE NOW**
3. Review, click on I agree to accept terms and conditions *
4. Click **CONTINUE**



APIR Candidate [Phase: Application]
NAIC
Pending verification
Acronym: APIR-C
Associate Professional in Insurance Regulation (APIR)
Please continue with all steps listed below.
Show more

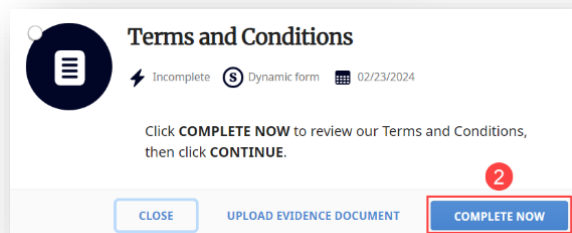
4 steps

Enrollment Application
Dynamic form **Completed** Due: 02/23/2024
You've taken the first step toward earning your APIR Designation. Please complete all enrollment steps below.

Enrollment Fee
Fees **Pending verification** Due: 02/23/2024
Enrollment fees are required to complete your enrollment application...

Terms and Conditions
Dynamic form **Incomplete** **1** Due: 02/23/2024
Click **COMPLETE NOW** to review our Terms and Conditions, then click **CONTINUE**.

Final Review for APIR Candidacy
Verification **Incomplete** Due: 02/23/2024
Your enrollment will be reviewed by NAIC. You will be notified of your status upon final review.

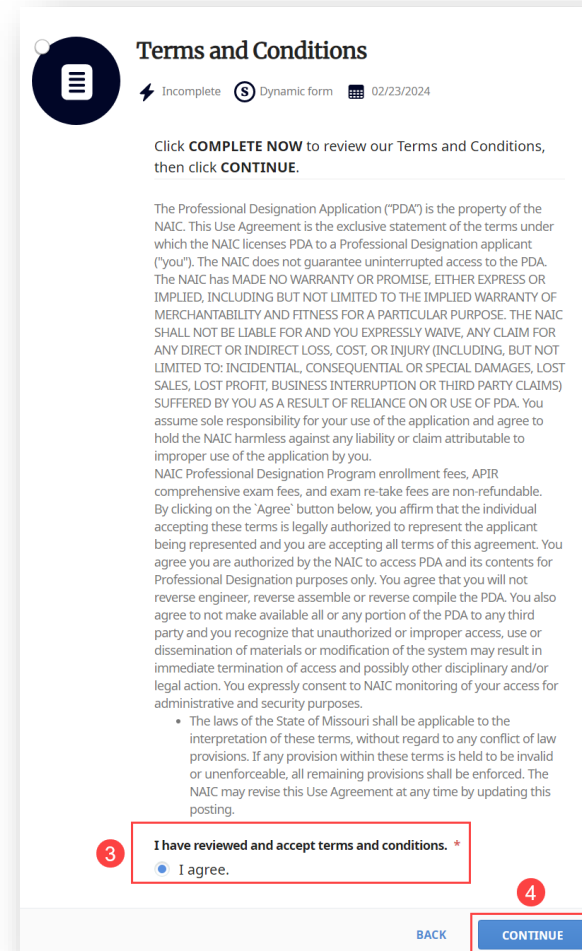


Terms and Conditions
⚡ Incomplete **S** Dynamic form **02/23/2024**

Click **COMPLETE NOW** to review our Terms and Conditions, then click **CONTINUE**.

2

CLOSE **UPLOAD EVIDENCE DOCUMENT** **COMPLETE NOW**



Terms and Conditions
⚡ Incomplete **S** Dynamic form **02/23/2024**

Click **COMPLETE NOW** to review our Terms and Conditions, then click **CONTINUE**.

The Professional Designation Application ("PDA") is the property of the NAIC. This Use Agreement is the exclusive statement of the terms under which the NAIC licenses PDA to a Professional Designation applicant ("you"). The NAIC does not guarantee uninterrupted access to the PDA. The NAIC has MADE NO WARRANTY OR PROMISE, EITHER EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO THE IMPLIED WARRANTY OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. THE NAIC SHALL NOT BE LIABLE FOR AND YOU EXPRESSLY WAIVE, ANY CLAIM FOR ANY DIRECT OR INDIRECT LOSS, COST, OR INJURY (INCLUDING, BUT NOT LIMITED TO: INCIDENTAL, CONSEQUENTIAL OR SPECIAL DAMAGES, LOST SALES, LOST PROFIT, BUSINESS INTERRUPTION OR THIRD PARTY CLAIMS) SUFFERED BY YOU AS A RESULT OF RELIANCE ON OR USE OF PDA. You assume sole responsibility for your use of the application and agree to hold the NAIC harmless against any liability or claim attributable to improper use of the application by you.

NAIC Professional Designation Program enrollment fees, APIR comprehensive exam fees, and exam re-take fees are non-refundable. By clicking on the 'Agree' button below, you affirm that the individual accepting these terms is legally authorized to represent the applicant being represented and you are accepting all terms of this agreement. You agree you are authorized by the NAIC to access PDA and its contents for Professional Designation purposes only. You agree that you will not reverse engineer, reverse assemble or reverse compile the PDA. You also agree to not make available all or any portion of the PDA to any third party and you recognize that unauthorized or improper access, use or dissemination of materials or modification of the system may result in immediate termination of access and possibly other disciplinary and/or legal action. You expressly consent to NAIC monitoring of your access for administrative and security purposes.

- The laws of the State of Missouri shall be applicable to the interpretation of these terms, without regard to any conflict of law provisions. If any provision within these terms is held to be invalid or unenforceable, all remaining provisions shall be enforced. The NAIC may revise this Use Agreement at any time by updating this posting.

3 **I have reviewed and accept terms and conditions. ***
 I agree.

4

BACK **CONTINUE**

Designation Candidate - Phase: Application



5. Use mouse or touchpad to Sign in box
6. Click **SUBMIT**

7. Click **CONFIRM** to complete form submission

Designation Candidate - Phase: Application



Final Review for APIR Candidacy

APIR Candidacy will display 'Pending verification' until processed by NAIC staff.

APIR Candidate [Phase: Application]
NAIC
Pending verification
Acronym: APIR-C
Associate Professional in Insurance Regulation (APIR)

Please continue with all steps listed below.
[Show more](#)

4 steps

- Enrollment Application**
Dynamic form **Completed** Due: 02/23/2024
You've taken the first step toward earning your APIR Designation. Please complete all enrollment steps below.
- Enrollment Fee**
Fees **Pending verification** Due: 02/23/2024
Enrollment fees are required to complete your enrollment application....
- Terms and Conditions**
Dynamic form **Completed** Due: 02/23/2024
Click **COMPLETE NOW** to review our Terms and Conditions, then click **CONTINUE**.
- Final Review for APIR Candidacy**
Verification **Pending verification** Due: 02/23/2024
Your enrollment will be reviewed by NAIC.
You will be notified of your status upon final review.

NAIC My Credentials Digital Wallet Transcripts User Guide

My Credentials

APIR Candidate [Phase: Candidacy]
NAIC
Accepted
Acronym: APIR-C

1 step

- Designee Requirements**
Dynamic form **Incomplete** Due: 02/23/2024
Satisfactorily complete the NAIC courses below and achieve a score of 70% or better on each corresponding exam....

APIR Candidate [Phase: Candidacy]
NAIC
1 step
Acronym: APIR-C
The APIR signifies the Designee has mastered foundation-level concepts in the areas of financial regulation, market conduct regulati...
[Show more](#)
In Progress

Designation Candidate - Phase: Acknowledgement



My Credentials: Left Panel: **Phase** and progress

Right Panel: **Steps** to complete

- Key:
- Incomplete
 - In progress
 - Completed

Phase: Acknowledgement

1. Click [Show more](#) and **Read Acknowledgement**
2. Click [Accept](#) (phase or steps panel)
3. Click [PROCEED IN CERTEMY](#)

The screenshot shows the NAIC My Credentials interface. The left panel displays the 'APIR Candidate [Phase: Acknowledgement]' credential, which is 1 step away from completion. A red box highlights the 'ACCEPT' button. The right panel shows the 'Integrity Oath' step, which is incomplete and due on 02/23/2022. A red box highlights the 'ACCEPT' button. A red arrow points from the 'ACCEPT' button in the right panel to the 'ACCEPT' button in the left panel.

The modal dialog box asks 'Do you currently hold this Credential?'. It provides instructions for users who want to complete the process for a new credential or renewal of an expired credential, and for users who have previously completed all steps required to receive their credential outside of the Certemy platform. The 'PROCEED IN CERTEMY' button is highlighted with a red box and a red number 3.

Designation Candidate - Phase: Acknowledgement



4. Click Integrity Oath (1 step)
5. Read, then click **COMPLETE NOW**
6. Read and check boxes to Agree:
 - Designation Program Policy & Procedures
 - Integrity Oath
7. Today's Date
 - Enter yyyy-mm-dd or use Calendar icon
8. Click **CONTINUE**

The screenshot shows the NAIC portal interface. At the top, there are navigation links: My Credentials, Digital Wallet, Transcripts, User Guide, and a user profile icon. The main content area is titled 'My Credentials' and features a search bar. Below this, there is a section for 'APIR Candidate [Phase: Acknowledgement]' with details about the candidate's progress (1 step, Acronym: APIR-C). To the right, there is a text block explaining the requirement to sign the Personal Integrity Oath upon admittance to the Program, listing potential sanctions for non-compliance. A progress indicator shows '1 step' with a red circle containing the number '4' next to the 'Integrity Oath' item, which is also highlighted with a red box.

This screenshot shows the 'Integrity Oath' form. It begins with a paragraph stating that the candidate understands the consequences of violating ethical standards. Below this, there are two sections for agreement, each with a checkbox and a red circle containing the number '6'. The first section is for the Designation Program Policy & Procedures, and the second is for the integrity oath. A 'Today's Date' field with a calendar icon and a red circle containing the number '7' is located below these sections. At the bottom of the form, there are 'BACK' and 'CONTINUE' buttons, with the 'CONTINUE' button highlighted by a red box and a red circle containing the number '8'.

This screenshot shows the 'Integrity Oath' form, focusing on the text of the oath. The text reads: 'I pledge to abide by the ethical standards set forth by the Insurance Regulator Professional Designation Program Advisory Board pertaining to Program admittance, course completion, general coursework, examinations, and other Program requirements. I affirm that:'. This is followed by a list of affirmations: 'electronic or hardcopy documents I submit to the NAIC in my pursuit of an NAIC Designation are factual and accurate. I will not misrepresent my academic achievements, credentials, coursework, work experience, or participation in NAIC committees, task forces, or other projects.', 'examination scores reflect my own knowledge and recall of information. I will not cheat or refer to study guides or other unauthorized materials within testing environments.', and 'examination questions and answers will remain confidential; I will not share this information with others.' Below the text, there is another paragraph: 'I understand that if I am found to be in violation of these ethical standards, I will be subject to disciplinary action by the Insurance Regulator Professional Designation Program Advisory Board as set forth in the Program policies.' This is followed by a section for agreement with a checkbox and a red circle containing the number '5'. At the bottom of the form, there are 'CLOSE', 'UPLOAD EVIDENCE DOCUMENT', and 'COMPLETE NOW' buttons, with the 'COMPLETE NOW' button highlighted by a red box and a red circle containing the number '5'.

Designation Candidate - Phase: Acknowledgement




9. Use mouse or touchpad to Sign in box

10. Click **SUBMIT**

I have read the Designation Program Policy & Procedures.
I have read and agree to the integrity oath.

Signature

9



Clear Sign above

10

BACK **SUBMIT**

11. Click **CONFIRM** to complete form submission

Please confirm form submission

Step name:
Integrity Oath

Step type:
Dynamic form

11

BACK **CONFIRM**

Designation Candidate - Phase: Candidacy



My Credentials: Left Panel: **Phase** and progress

Right Panel: **Steps** to complete

- Key:
- Incomplete
 - In progress
 - Completed

Phase: Candidacy

Satisfactorily complete required NAIC courses and achieve a score of 70% or better on each exam.

1. Click on Designee Requirements

The screenshot displays the 'My Credentials' section with a search bar. Two credential cards are visible: 'APIR Candidate [Phase: Candidacy]' and 'APIR Designee [Phase: Renewal]'. The 'APIR Candidate' card is highlighted with a red box. To its right, a detailed view of the 'Designee Requirements' step is shown, also highlighted with a red box. This view includes a '1' in a red circle, indicating it is the first step, and a status of 'Incomplete' with a due date of '02/23/2024'. A larger, semi-transparent overlay window titled 'Designee Requirements' is positioned over the right side of the screenshot. This window contains the following text: 'Satisfactorily complete the NAIC courses below and achieve a score of 70% or better on each corresponding exam.' followed by a bulleted list of three courses: 'Foundations of Insurance Regulation', 'Introduction to Financial Regulation', and 'Regulation of Insurance Products'. Below this, it states 'Course registrations can be made by visiting the Education and Training Course Schedule.' and 'All Designation Program course exams must be taken within 60 days of course completion.' At the bottom, it says 'Select COMPLETE NOW to continue.' and features three buttons: 'CLOSE', 'UPLOAD EVIDENCE DOCUMENT', and 'COMPLETE NOW'. The 'COMPLETE NOW' button is highlighted with a red box and a '2' in a red circle.

2. Click **COMPLETE NOW**

Designation Candidate - Phase: Candidacy



3. Read and accept Designee requirements

- Yes

4. Click **CONTINUE**

Note: Designee Requirements for Candidacy will show completed **only after** satisfactorily completing the required NAIC courses and exams.

EXAM SCORES WILL POPULATE AUTOMATICALLY

5. Click **CONFIRM**

UPON SUCCESSFULLY COMPLETING ALL REQUIRED EXAMS, AN ELECTRONIC AWARD WILL BE ISSUED.

YOU MUST ACCEPT YOUR AWARD TO BE AWARDED THE DESIGNATION. YOUR DESIGNATION WILL BE VALID FOR THREE YEARS FROM THE DATE AWARDED.

Designation Designee - Phase: Renewal



My Credentials: Left Panel: **Phase** and progress

Right Panel: **Steps** to complete

- Key:
- Incomplete
 - In progress
 - Completed

Phase: Renewal *(Designees can enroll in a subsequent designation level noted below)*

Designees seeking to renew their designations must earn the minimum required DRCs within the specified reporting period.

65 DRC's are required per three (3) year reporting period, with a minimum of 16 DRCs earned in NAIC Education & Training Department Courses.

1. To record, click on Designation Renewal Credits

The screenshot displays the 'My Credentials' section on the left and the 'APIR Renewal [Phase: Renewal]' details on the right. The left panel shows the APIR logo, the phase name, and a '1 step' progress indicator. The right panel provides details for the APIR designation, including the acronym, expiration date (07/30/2024), and a requirement for 65 Designation Renewal Credits (DRCs). A red box highlights the 'APIR Designation' link in the text, with an arrow pointing to a note: 'Note: Click link to enroll in a subsequent designation level'. Below this, a table shows the 'Designation Renewal Credits' step as 'Incomplete' with a due date of 07/29/2024. A red circle with the number '1' is placed next to the table header.

Step	Status	Due Date
1	Incomplete	07/29/2024

Designation Designee - Phase: Renewal



To Submit Credits for NAIC Education & Training Department Courses

1. Click **NAIC Education & Training Department Courses**
(left side)

Designation Renewal Credits

Incomplete Education 02/23/2024

65 DRC's are required per three (3) year reporting period, with a minimum of 16 DRCs earned in NAIC Education & Training Department Courses.

Designees seeking to renew their designations must earn the minimum required DRCs as set forth in this document within the specified reporting period.

Designees are expected to maintain personal files containing information and documentation in support of their learning activities for at least six (6) years, or two (2) full reporting periods. Documentation includes course completion certificates, rosters, meeting minutes, or other materials that provide substantive evidence that learning activities have met NAIC Minimum Education Standards. Designees may be asked to produce their files for review in the event of an audit.

The NAIC will conduct periodic audits of Designee files and documentation to ensure that activities submitted on the Renewal Application Form meet the requirements set forth in this document.

65 Credits Incomplete	0 Credits Pending verification	0 Credits Completed
---------------------------------	--	-------------------------------

Education step details

Industry:	Other
Speciality:	N/A
CE type:	General CE
CE classification:	N/A
Required credits:	65

Specific requirements

- NAIC Education & Training Department Courses**
Incomplete • 0 of 16 completed **1**
- Continuous Education**
Incomplete • 0 of 49 completed

Designation Designee - Phase: Renewal



2. Complete all required * fields

(right side)

- Activity type *
- Credits *
- Activity title *
- Activity sponsor / Provider *
- Date when the activity was completed

3. Upload credential files(s) (up to 5 MB) *

Drag/drop file(s) or use Browse to upload

4. Click **CONTINUE**

The screenshot shows a web form titled "Submit Credits for NAIC Education & Training Department Courses". The form is for the "NAIC Education & Training Department Courses" and is currently "Incomplete" with "0 of 16 completed". The form fields are as follows:

- Activity type ***: A dropdown menu with "Please select" as the current selection. A red circle with the number "2" is next to it.
- Credits * Ⓢ**: A text input field. Below it, a note says "Value should be multiple of 0.01" and "Reporting more than 16 credits will not affect your progress".
- Activity title ***: A text input field.
- Activity sponsor/ Provider ***: A text input field.
- Date when the activity was completed ***: A date picker with the format "yyyy-mm-dd".
- Upload credential file(s) (up to 5 MB) ***: A dashed box containing a red circle with the number "3", a cloud icon, and the text "Drop files to attach, or [Browse](#)".

At the bottom right of the form, there is a blue button labeled "CONTINUE" with a red circle containing the number "4" next to it.

Designation Designee - Phase: Renewal



To Submit Credits for Continuous Education

1. Click **Continuous Education**
(left side)

Designation Renewal Credits

Incomplete Education 02/23/2024

65 DRC's are required per three (3) year reporting period, with a minimum of 16 DRCs earned in NAIC Education & Training Department Courses.

Designees seeking to renew their designations must earn the minimum required DRCs as set forth in this document within the specified reporting period.

Designees are expected to maintain personal files containing information and documentation in support of their learning activities for at least six (6) years, or two (2) full reporting periods. Documentation includes course completion certificates, rosters, meeting minutes, or other materials that provide substantive evidence that learning activities have met NAIC Minimum Education Standards. Designees may be asked to produce their files for review in the event of an audit.

The NAIC will conduct periodic audits of Designee files and documentation to ensure that activities submitted on the Renewal Application Form meet the requirements set forth in this document.

65 Credits Incomplete	0 Credits Pending verification	0 Credits Completed
---------------------------------	--	-------------------------------

Education step details

Industry:	Other
Speciality:	N/A
CE type:	General CE
CE classification:	N/A
Required credits:	65

Specific requirements

- NAIC Education & Training Department Courses**
Incomplete • 0 of 16 completed
- Continuous Education** 1
Incomplete • 0 of 49 completed

Designation Designee - Phase: Renewal



2. Complete all required * fields

(right side)

- Activity type *
 - Special Projects
 - NAIC Course Development/Instructor
 - Task Force or Working Group
 - NAIC Meeting Participation
- Credits *
- Activity title *
- Activity sponsor / Provider *
- Date when the activity was completed

3. Upload credential files(s) (up to 5 MB) *

Drag/drop file(s) or use Browse to upload

4. Click **CONTINUE**

A screenshot of the "Submit Credits for Continuous Education" web form. The form is titled "Submit Credits for Continuous Education" and has a sub-header "Continuous Education" with a puzzle piece icon and the text "Incomplete • 0 of 49 completed". The form contains several fields: "Activity type *" (a dropdown menu with "Please select" and a red circle 2 next to it), "Credits *" (a text input field with a red circle 2 next to it, and a note "Value should be multiple of 0.01 Reporting more than 49 credits will not affect your progress"), "Activity title *" (a text input field), "Activity sponsor/ Provider *" (a text input field), "Date when the activity was completed *" (a date picker with "yyyy-mm-dd" and a calendar icon), and "Upload credential file(s) (up to 5 MB) *" (a dashed box with a red circle 3 next to it, containing a cloud icon and the text "Drop files to attach, or Browse"). At the bottom right, there is a blue "CONTINUE" button with a red circle 4 next to it.