

Table of Contents

Login for First Time	1
Login (NOT the first time)	2
Forgot Password	4
Change Password	6
Download a Course Completion Roster (.csv File) Template	9
Create a Course Completion Roster (.csv file) to Upload	17
Upload New Course Completion Roster (via a .csv file)	24
Submit Individual Course Completion — for Individual Students	26
View Course Completions (Previously Submitted)	28
Remove/Delete Course Completions	32
Review Course List	32
Review or Update User Profile	33
Log Out	38
Troubleshooting — Hints and Tips	40

Login for First Time

When logging in for the first time, access the system at: https://utdre.useclarus.com/. This link opens the login page:



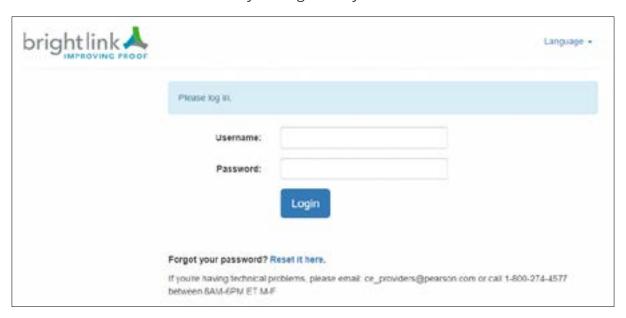
Then follow the steps in the **Forgot Password** section of this document. Your Username is your Utah Provider ID.

Login (NOT the first time)

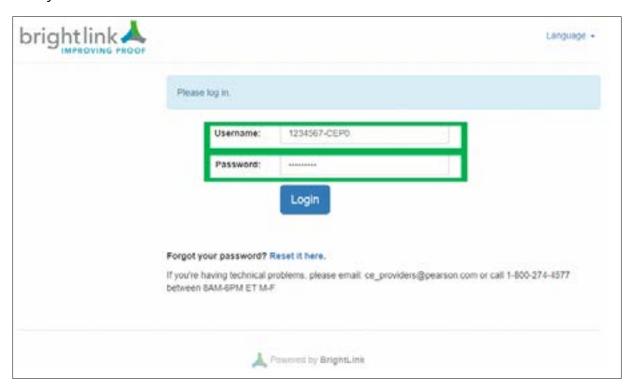
Access the CE system at: https://utdre.useclarus.com/

NOTES:

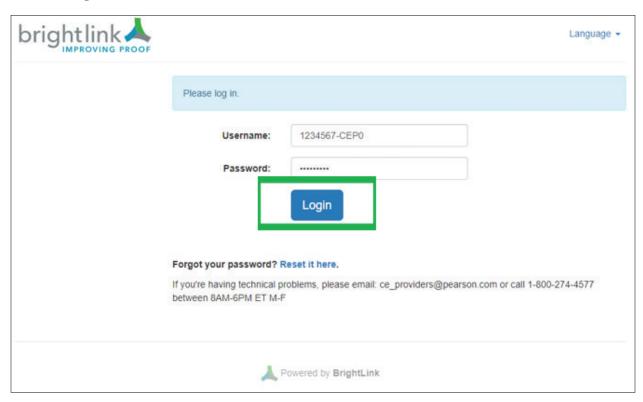
- a) If logging in for the very first time, see the **Login for First Time** section of this document.
- b) For each active Provider, one Provider account is created. To have additional user accounts created, contact Pearson VUE via email: ce_providers@pearson.com or call 1-800-274-4577 between 8AM-6PM Eastern Monday through Friday.



Enter your username into the "Username" field and your password into the "Password" field. Your Username is your Utah Provider ID.:

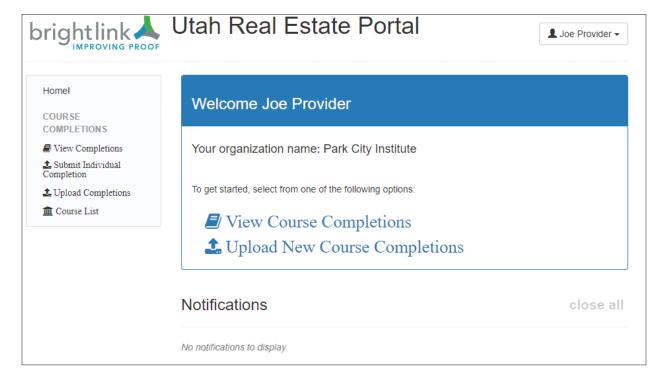


Then click the "Login" button:



NOTE: If the following error message appears, check to make sure the CAPS LOCK on your keyboard is <u>off</u>. The username/password combination you entered was not recognized.

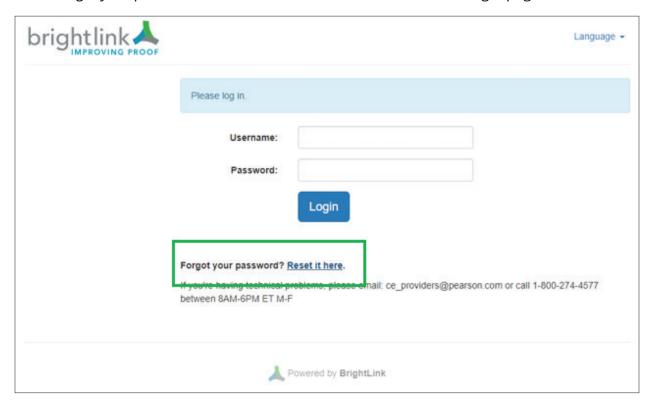
After successfully logging in, the Utah Division of Real Estate CE Banking Portal Home page will appear:



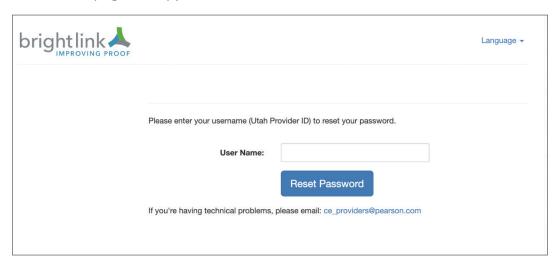
Forgot Password

NOTE: The user must have a valid email address in the system to use this feature.

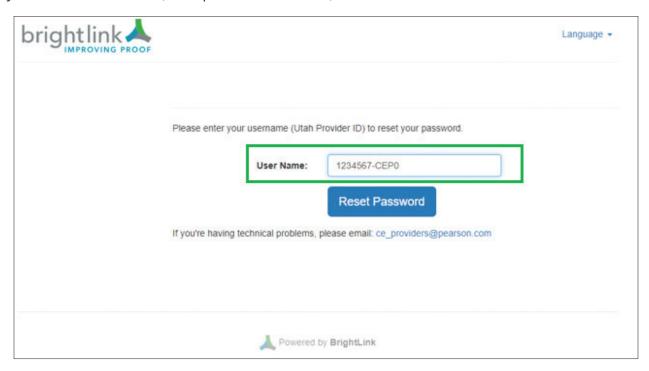
Click on the "Forgot your password? Reset it here" link at the bottom of the login page.



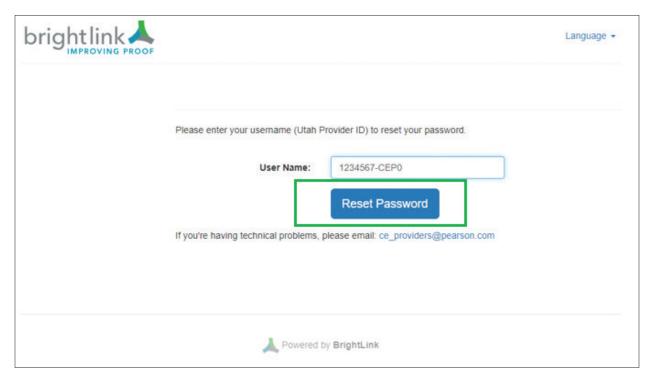
On the "Reset Password" page will appear:



Enter your Utah Provider ID (example: 1234567-CEP0) into the "User Name" field:



Click on the "Reset Password" button to have a password reset email sent to the email address in the system.



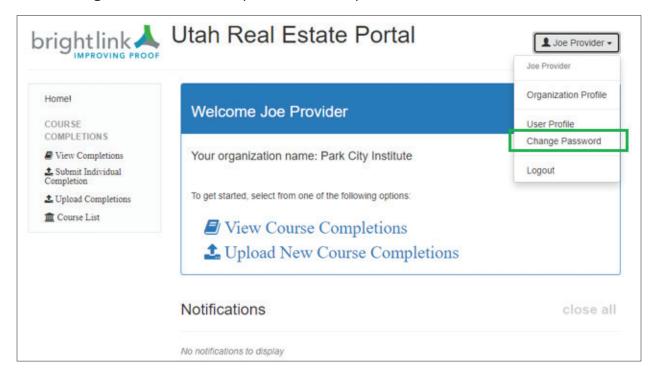
Open your email inbox. Open the password reset email. Click on the link in the email to reset your password.

Change Password

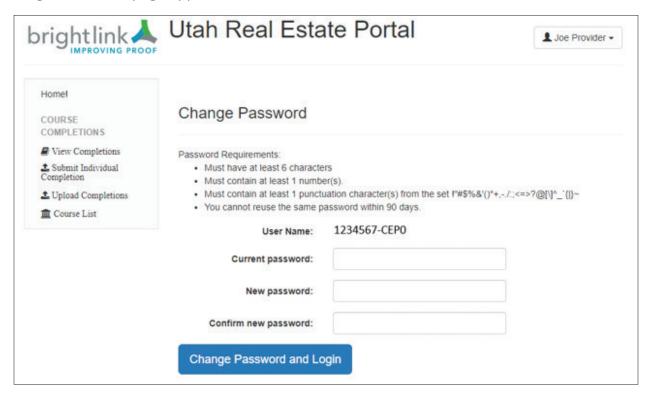
Click on the triangle behind your name in the upper-right corner of the Utah Division of Real Estate CE Banking Portal Home page to display the drop-down menu.



Click on the "Change Password" menu option on the drop-down menu:



The "Change Password" page appears:



Enter your current password into the "Current password" field.

Enter your new password into the "New password" and the "Confirm new password" fields.



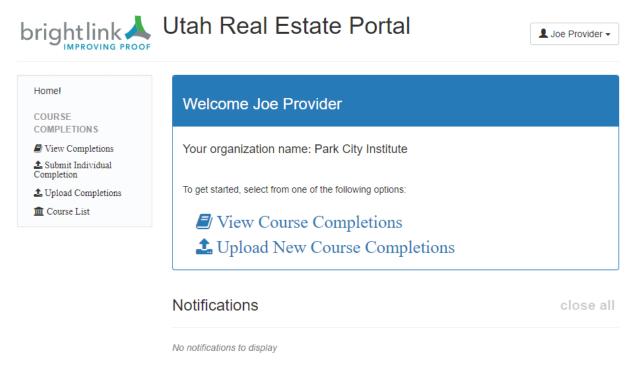
NOTE: The password requirements are:

- Must have at least 6 characters
- Must contain at least 1 number
- Must contain at least 1 punctuation character(s) from the set !"#\$%&'()*+,-./:;<=>?@[\]^_`{|}~
- You cannot reuse the same password within the last 90 days

Click the "Change Password and Login" button:

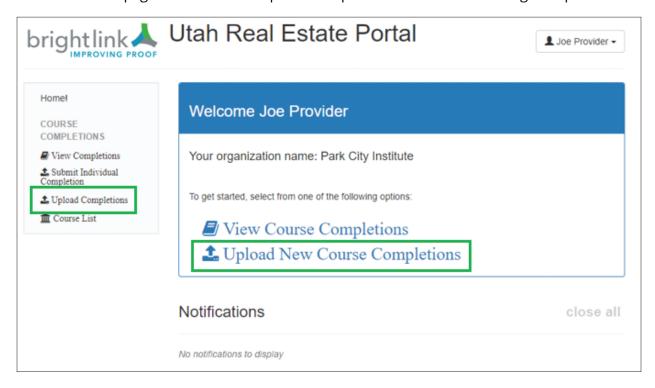


The Utah Division of Real Estate CE Banking Portal Home page will appear:

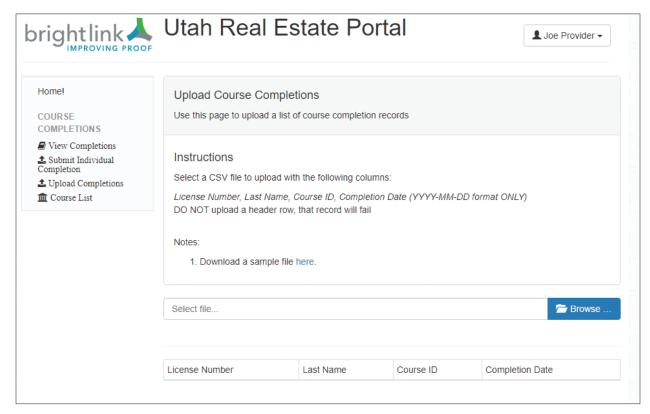


Download a Course Completion Roster (.csv File) Template

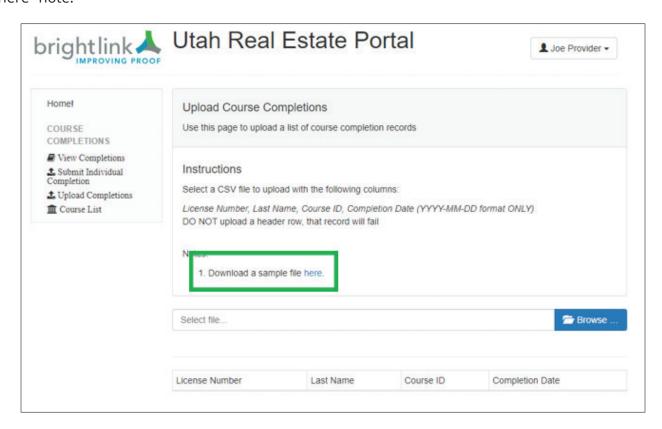
On the Utah Division of Real Estate CE Banking Portal Home page, click on the "Upload New Course Completions" link in the center of the page or click on the "Upload Completions" link in the left navigation pane:



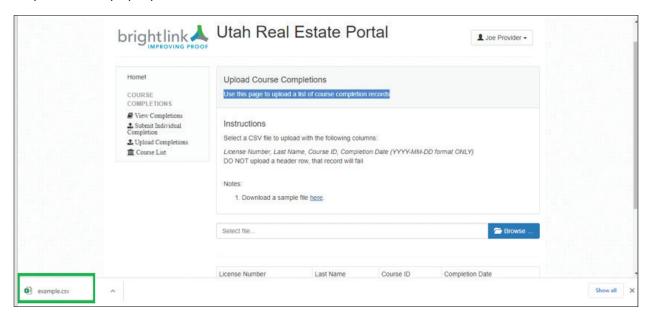
The "Upload Course Completions" page will appear:



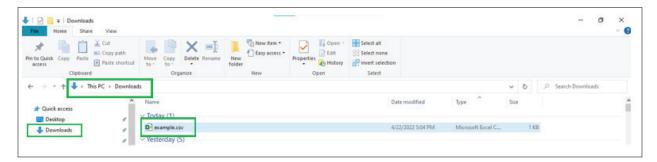
An example CSV file can be downloaded by double-clicking the blue here link in the "1. Download a sample file here" note:



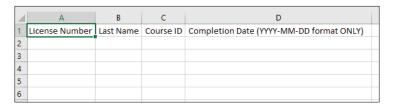
The example file will pop up at the bottom left of the screen once downloaded:



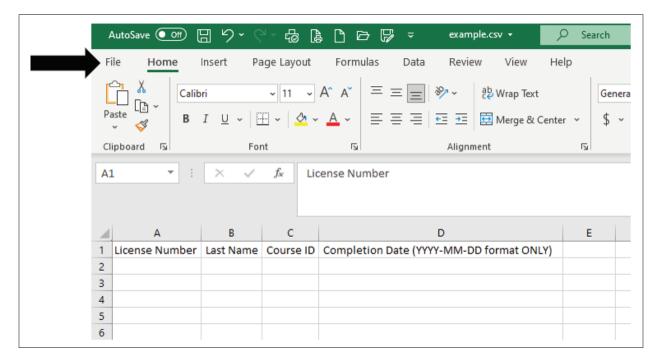
Double-click on the file to open the "example.csv" file in Excel. If the file does not pop up at the bottom left of the screen once downloaded, then check your "Downloads" folder in File Explorer:



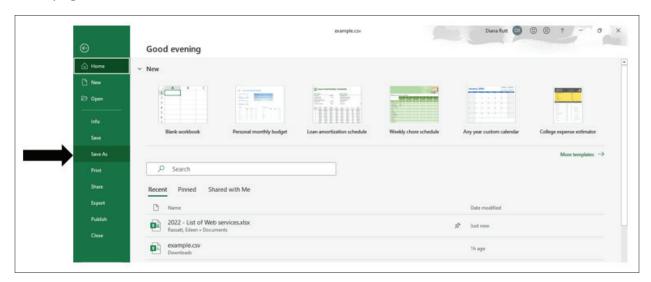
Double-click the file to open it. The "example.csv" file looks like this in Excel:



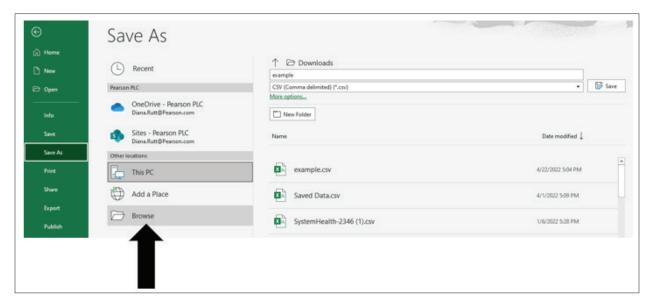
To save the "example.csv" file on your computer, click on the word "File" in the top left corner of the Excel screen:



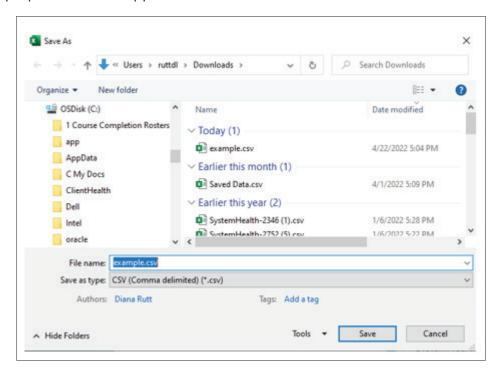
On the next page, click on "Save As:"



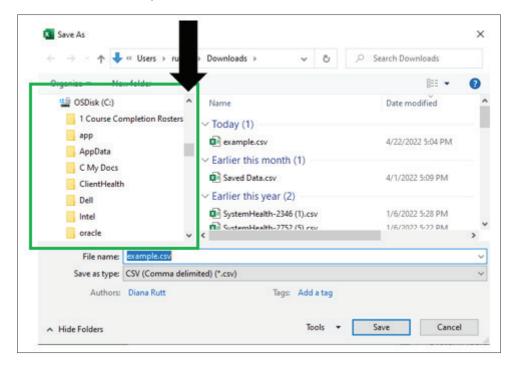
On the "Save As" page, click on "Browse:"



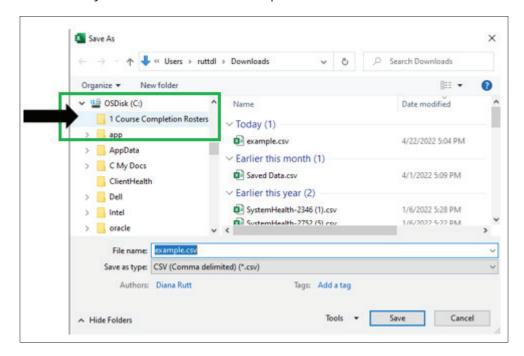
The "Save As" pop-up window will appear:



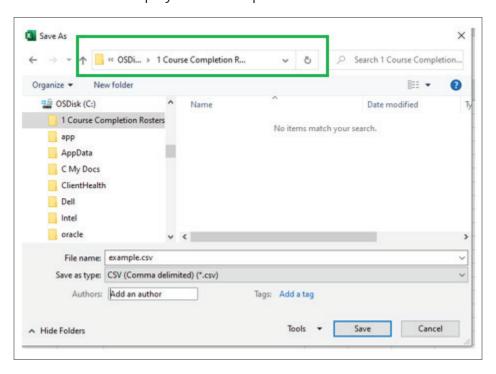
On the "Save As" pop-up window, scroll through the left panel to find the folder location on your computer in which you want to save the "example.csv" file:



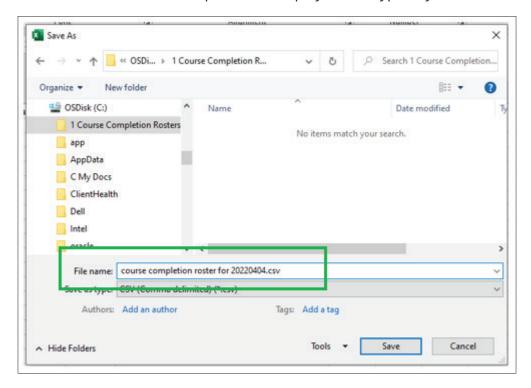
Click on the folder in which you want to save the sample file to select it:



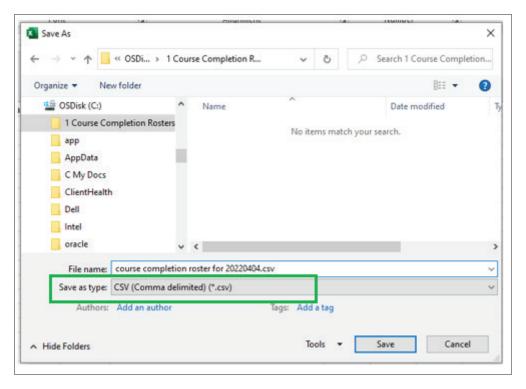
The folder you selected should be displayed at the top of the "Save As" window:



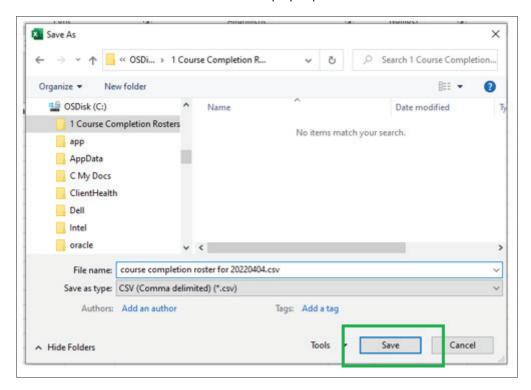
Click into the "File name" field where "example.csv" is displayed and type in your new file name:



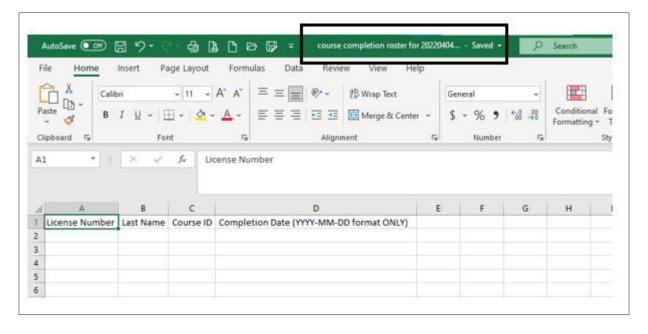
Be sure the "save as type" field is set to: CSV (Comma delimited) (*.csv):



Then, click on the "Save" button at the bottom of the pop-up window to save the file:



The "Save As" window will close and the newly-saved file (e.g., course completion roster for 20220404.csv) file will remain open in Excel. The new file name will display at the top of the window as show below:



Create a Course Completion Roster (.csv file) to Upload

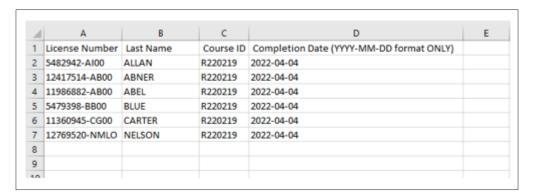
<u>All</u> the following information MUST be entered into the CSV file for <u>each</u> student that has completed the course:

- A. License Number
- **B** Last Name
- C. Course ID
- D. Completion Date (YYYY-MM-DD format ONLY)

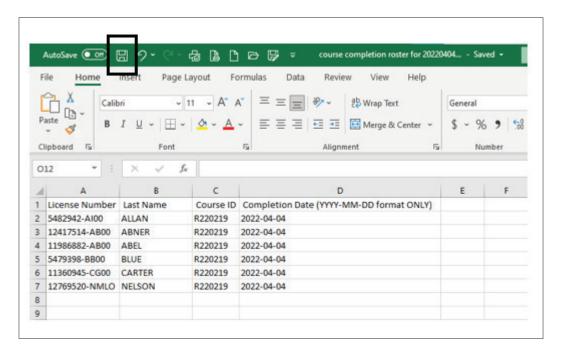
NOTES:

- 1. All four data elements listed above are required for each student.
- 2. Course completions for a course completed on more than one date <u>may</u> be submitted in the same file.
- 3. Course completions for more than one course may be submitted in the same file.
- 4. The header row with column headings (Excel row 1) <u>can</u> be included in the file, however that row/record will error.
- 5. However, all other rows/records will <u>not</u> be impacted; the system will process the rest of the rows/records in the file even if the header row with column headings (Excel row 1) errors.
- 6. If you do not want to receive an error for the header row with column headings, then exclude it from the file that is uploaded.

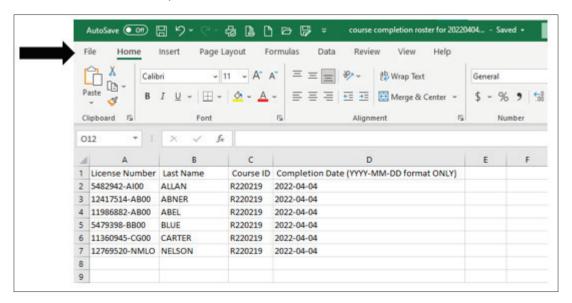
Enter the required data into the file. Here's an example:



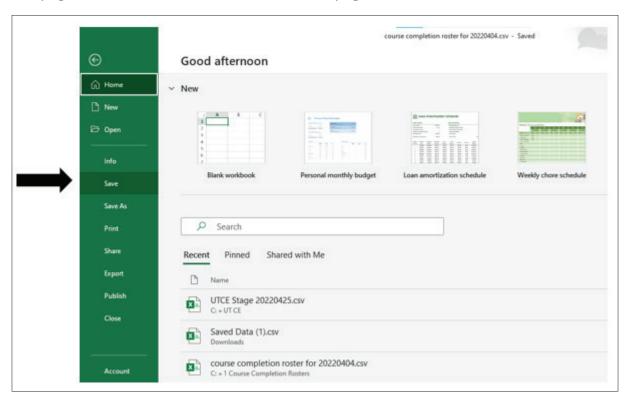
After all data is entered, save the file on your computer by clicking on the "save" button on the top of the Excel screen:



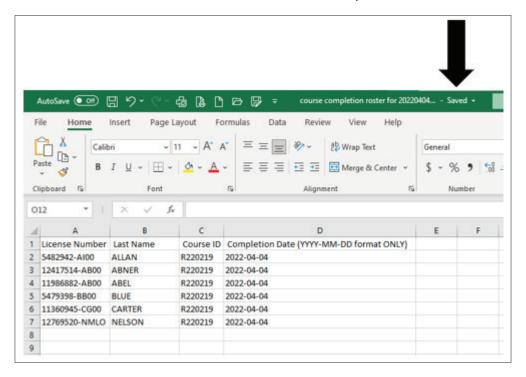
Or, click on the word "File" in the top left corner of the Excel screen:



On the next page, click on "Save" on the left side of the page:



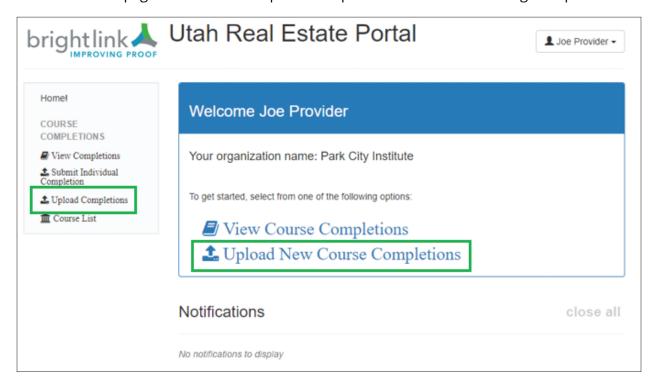
The window will close and the file will be saved, as noted at the top of the file in Excel:



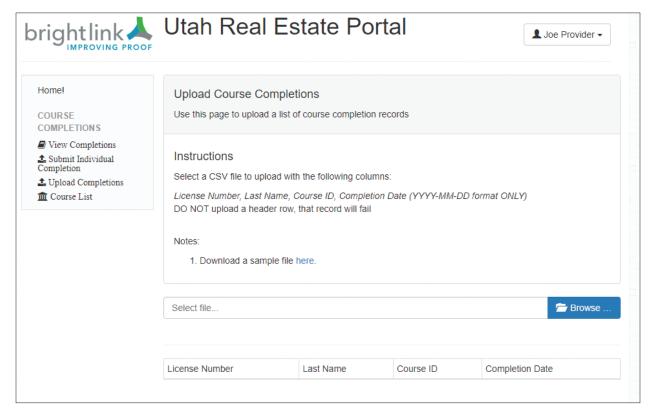
Follow the instructions in the "Upload New Course Completion Roster (via a .csv file)" section of this document (page 20) to upload the file.

Upload New Course Completion Roster (via a .csv file)

On the Utah Division of Real Estate CE Banking Portal Home page, click on the "Upload New Course Completions" link in the center of the page or click on the "Upload Completions" link in the left navigation pane:

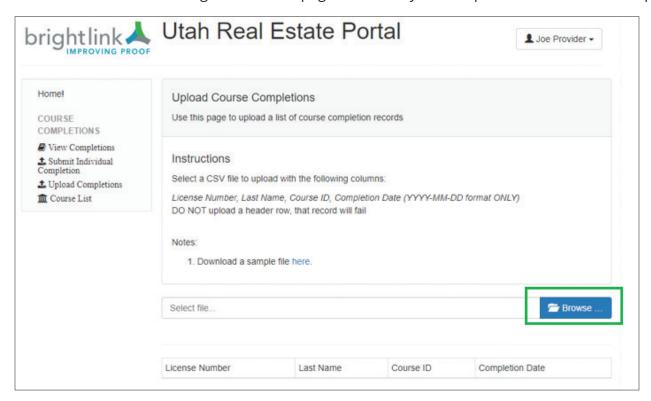


The "Upload Course Completions" page will appear:

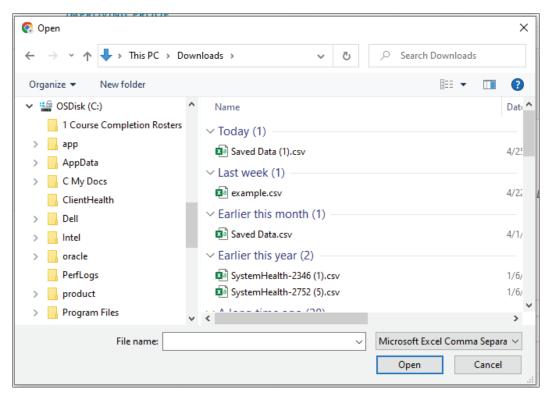


Use this page to upload a list or roster of course completion records.

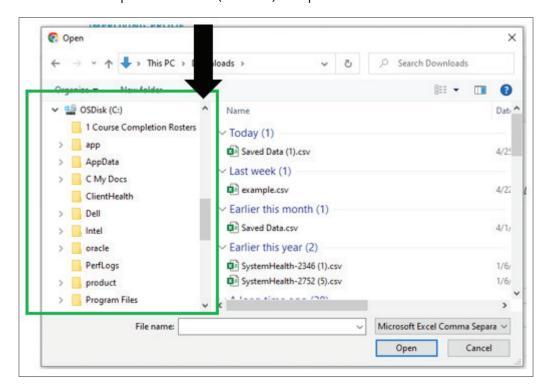
Click the "Browse" button on the right side of the page to browse your computer for the .csv file to upload.



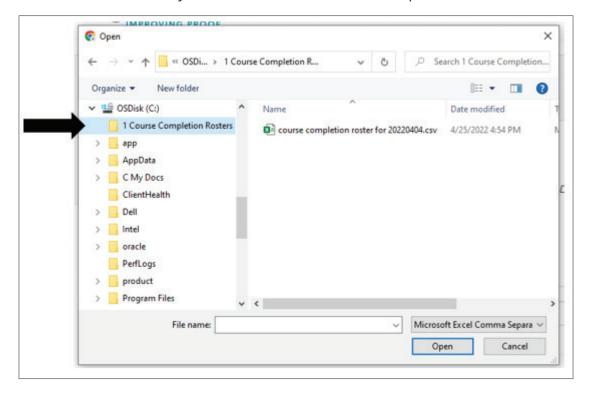
The "Open" pop-up window will appear:



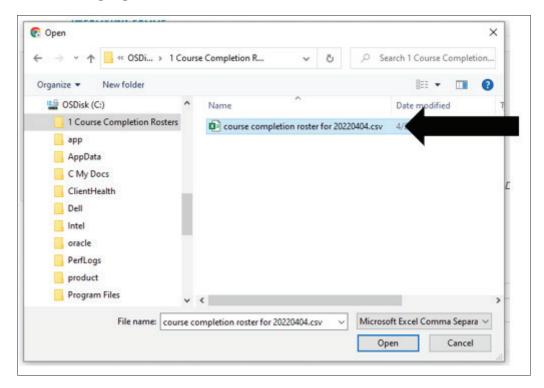
On the "Open" pop-up window, scroll through the left panel to find the folder location on your computer that contains the course completion roster (.csv file) to upload:



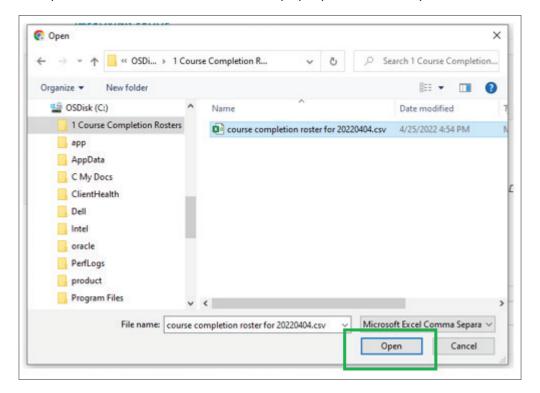
Double-click on the folder in which your file is located to select and open it:



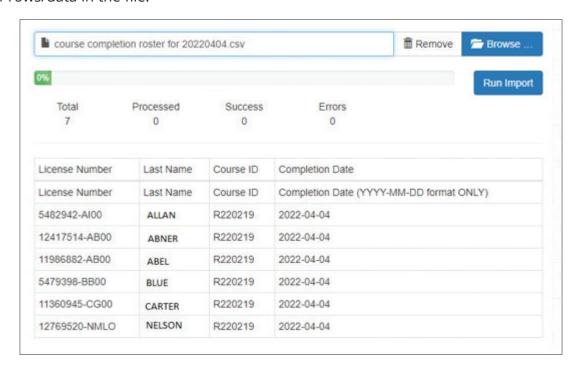
Click on the file name to highlight it:



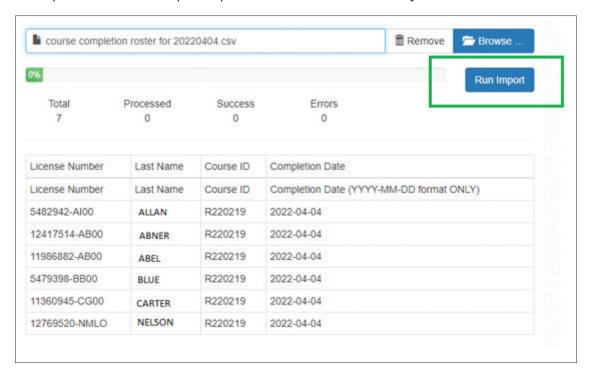
Then, click on the "Open" button at the bottom of the pop-up window to upload the file:



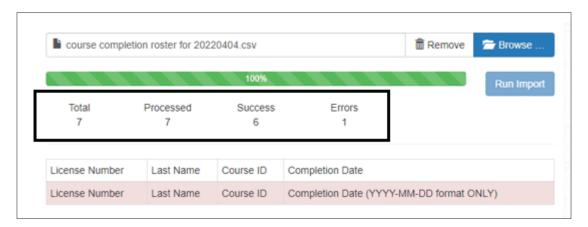
The CE system will review the file and provide the Total number of records in the file as well as list the number of rows/data in the file:



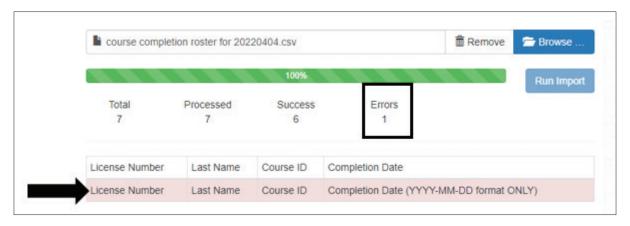
Click the "Run Import" button to import/upload the records into the system.



Once the file is 100% processed by the CE system, the Processed, Success, and Error numbers on the page will be updated.



If there are errors with records in the file, the record(s) will be highlighted in pink:



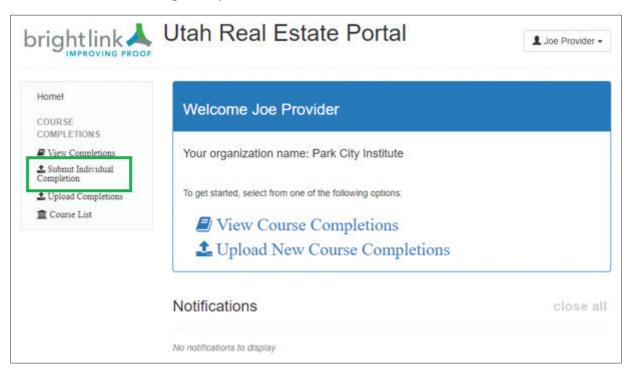
NOTE: If the header row IS included in the .csv file, it will error as show above. Also as shown above, the rest of the rows/records in the file are processed even though the header row erred.

REMINDER: Exclude the header row from the file if you do not want that record to error.

Correct the erred records and submit those records in a new file.

Submit Individual Course Completion — for Individual Students

On the Utah Division of Real Estate CE Banking Portal Home page, click on the "Submit Individual Completion" link in the left navigation pane.



The "Upload Candidate Record" page will appear:



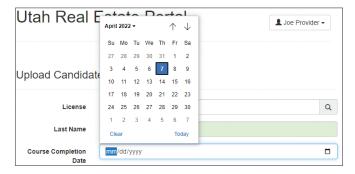
Enter the license number of the student that completed the course into the "License" field.

Enter the last name of the individual in the "Last Name" field.

Click in the "Course Completion Date" field to enter the course completion date (in mm-dd-yyyy format).



Or click on the calendar button in the right side of the "Course Completion Date" field to make the calendar pop up. Then click on the correct date.



Click on the "Course Client ID" field to display all active courses. Scroll to find the correct course and then click on it to select the course.



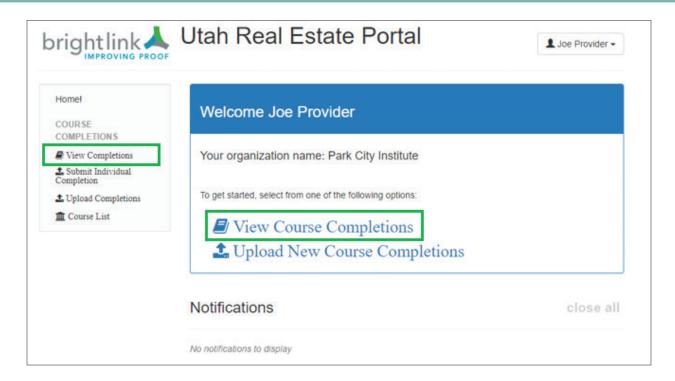
After all information is entered, click the "Submit" button at the bottom of the page.

A pop-up window will display a "success!" message if the course completion was submitted successfully:

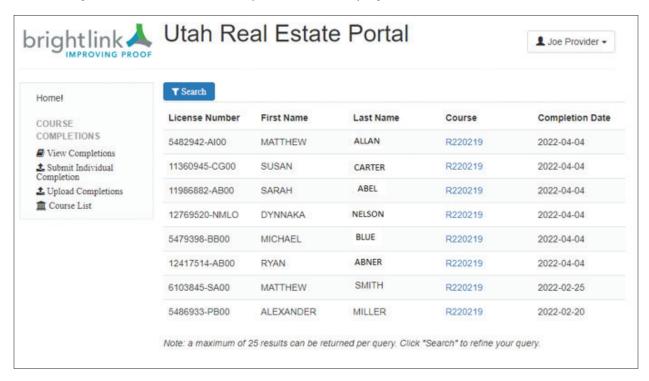


Click the "OK" button to close the pop-up window.

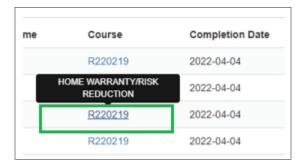
View Course Completions (Previously Submitted)



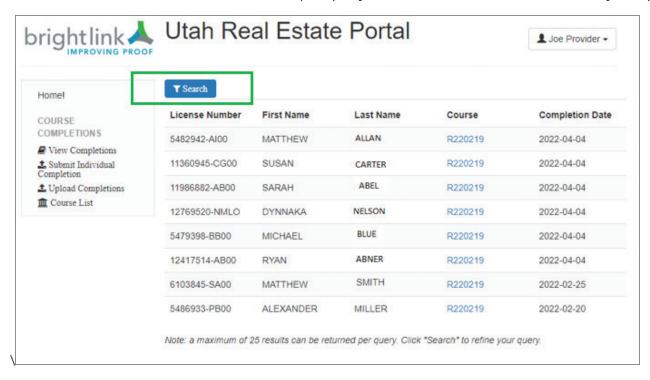
The most recently submitted course completions are displayed:



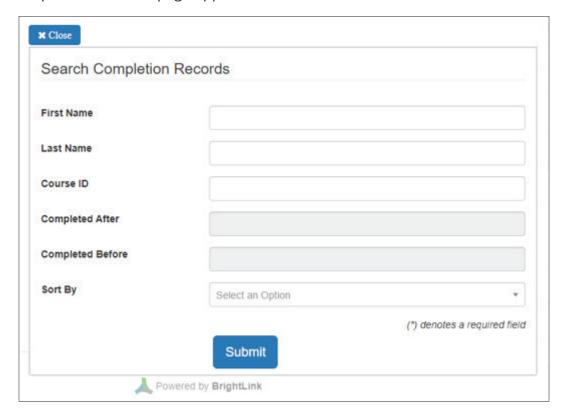
Click on the Course number to see the course name:



NOTE: A maximum of 25 results can be returned per query. Click the "Search" button to refine your query:



The "Search Completion Records" page appears:



Enter data into any one or more of the following fields on the "Search Completion Records" page

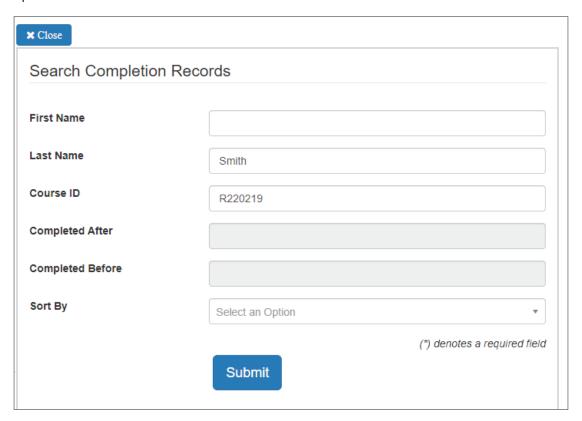
First Name

Last Name

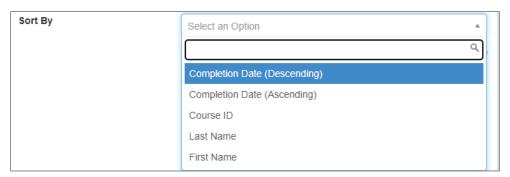
Course ID

Completed After

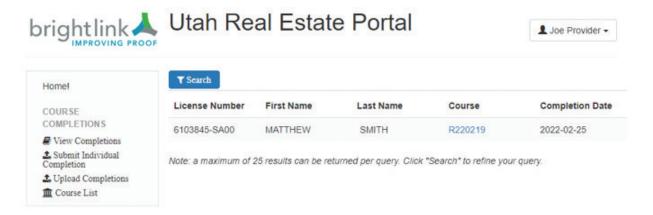
Completed Before



Select an option from the "Sort By" drop-down menu, if needed:



Then click the "Submit" button on the bottom of the page. The search results appear:

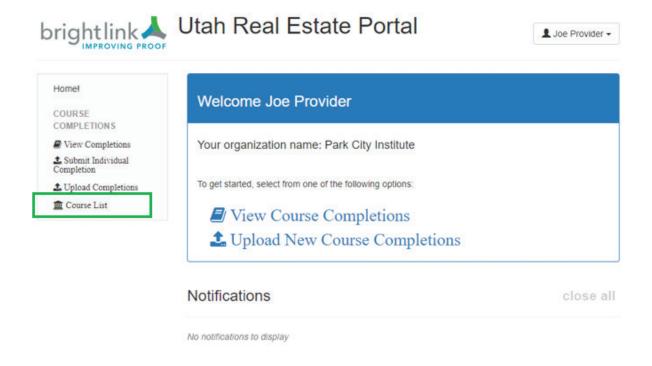


Remove/Delete Course Completions

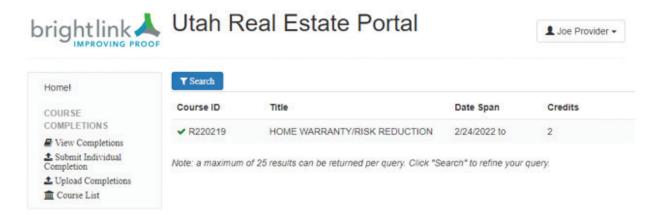
If a course completion is entered in error, please contact Pearson VUE via email at the following address: **ce_providers@pearson.com**. Provide all the incorrect data that was submitted.

Review Course List

On the Utah Division of Real Estate CE Banking Portal Home page click on the "Course List" link on the left panel:

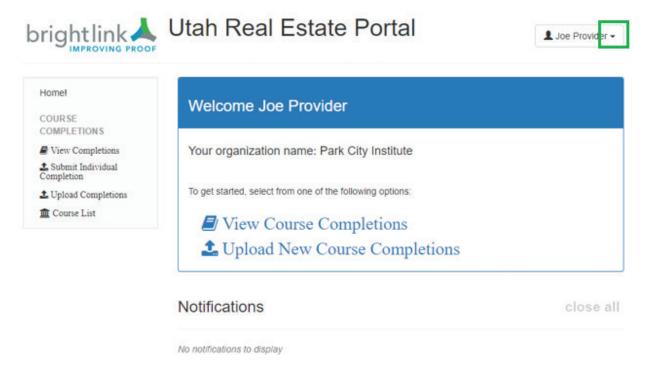


The course list will appear:

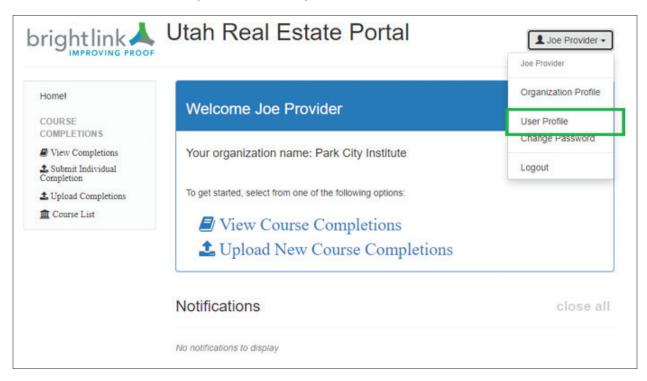


Review or Update User Profile

Click on the triangle behind your name in the upper-right corner of the Utah Division of Real Estate CE Banking Portal Home page to display the drop-down menu.



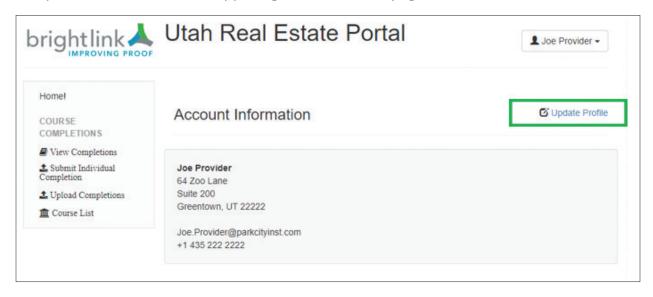
Click on the "User Profile" menu option in the drop-down menu:



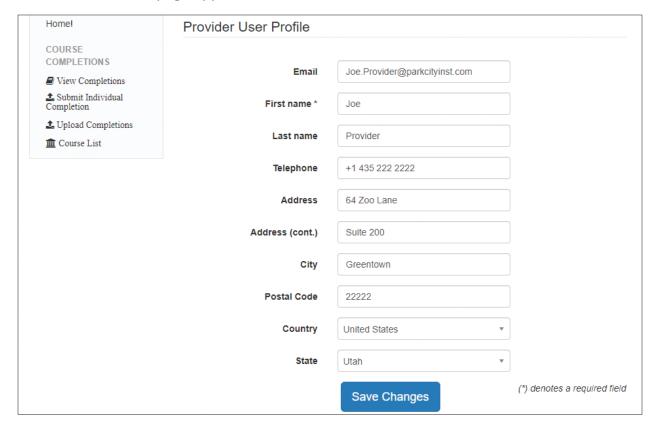
The "Account Information" page appears:



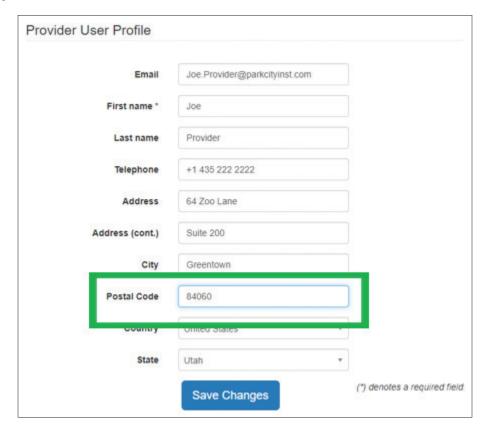
Click the "Update Profile" link in the upper-right corner of the page.



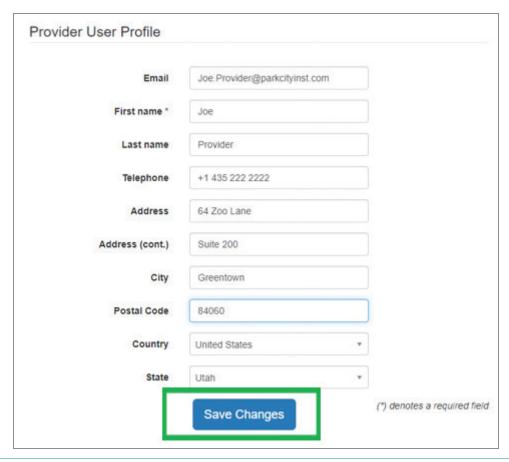
The "Provider User Profile" page appears:



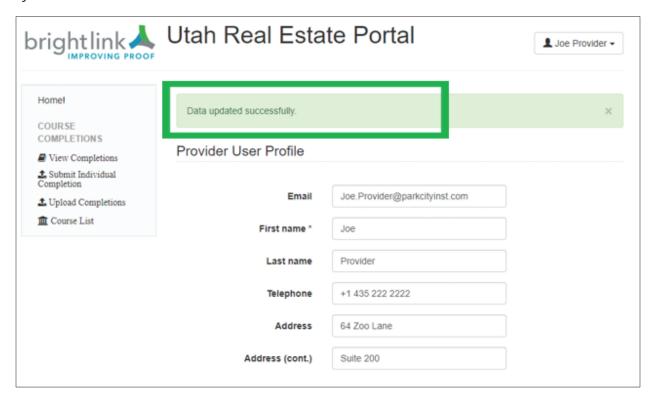
Edit the necessary fields:



Then click on the "Save Changes" button on the bottom of the page:

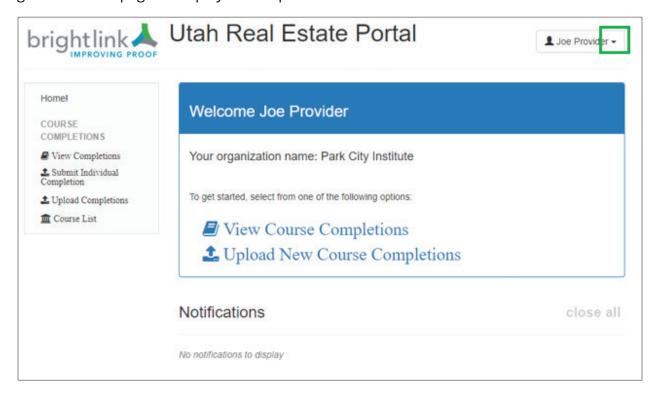


The "Data updated successfully" message will appear at the top of the page after the changes are saved by the system as show below.

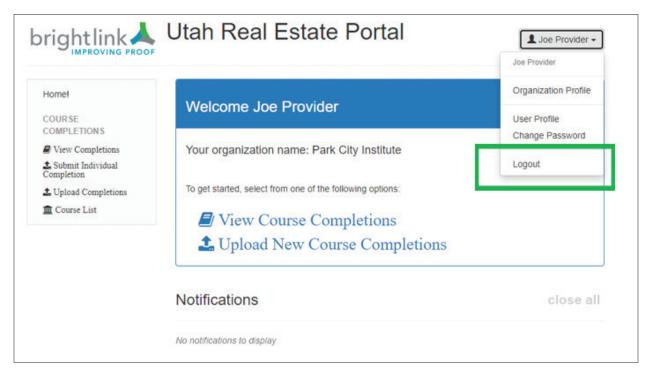


Log Out

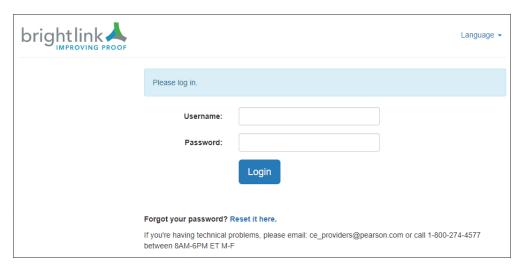
Click on the triangle behind your name in the upper-right corner of the Utah Division of Real Estate CE Banking Portal Home page to display the drop-down menu.



Click on the "Logout" menu option in the drop-down menu:



The Login page will appear:



Troubleshooting — Hints and Tips

Make sure the Course exists in the system before uploading a CSV file/roster or submitting course completions.

Make sure the student license number is correct. The course completion will not load into the system if any of the following are incorrect:

License Number

Last Name

Course ID

Completion Date (YYYY-MM-DD format ONLY)

Contact Pearson VUE email: ce_providers@pearson.com or call 1-800-274-4577 between 8AM-6PM Eastern Monday through Friday.

Set the Completion Date fields in the .csv file to "Text" so the date can be entered in the format required by the system (YYY-MM-DD)

