

# LOMA November 2019 Enrollment Instructions



These are your instructions for enrolling students for **November 2019** paper examinations. You may photocopy these instructions and forward them to your company's branch and field offices. These instructions include the **Secondary Organization Form**, **Promotional Materials Order Form**, and the **November 2019 Exam Schedule**. Examinations will be given from **November 4 - 8, 2019**. Please call the Office of the Registrar at (800) ASK-LOMA, option 1, or (770) 984-3761 or send us a fax at (770) 984-6415 or e-mail [education@loma.org](mailto:education@loma.org), with questions.

There are two enrollment options for LOMA companies:

1. Education Representatives may enroll their students through LOMA's Learning Management System (LMS) at <https://learning.loma.org>. We have included information on Enrolling Students via LOMA's LMS.
2. Companies with a **minimum of 50 enrollments** for the period may elect to use the electronic bulk enrollment option. You will have until the Paper Enrollment deadline of **August 23, 2019**, to complete the enrollments and submit the final enrollment file.

The Batch Enrollment feature at <https://edreptools.loma.org> may be used to enroll one or more students. Please email [education@loma.org](mailto:education@loma.org) to receive more detailed information about using the electronic enrollment option.

## ENROLLMENT GUIDELINES

**DEADLINES – LMS and Late Paper Enrollment** deadline is **August 23, 2019**. Exam Site changes/additions/deletions are due by **September 11, 2019**.

**MISSED DEADLINE POLICY** – We can accept enrollments after the late enrollment deadline (**August 23, 2019**) for an additional fee of **\$125.00 per exam**. This fee is in addition to the enrollment fee, and is necessary to cover the extensive costs of the complex manual handling involved in processing enrollments received so late.

**CANCELLATION POLICY** – Enrollment changes (and un-enrollments) can be made until the enrollment deadline of **August 23, 2019**. All fees are nontransferable between students or courses.

**ED REPS ENROLLING FOR PAPER EXAMS** – If you, as the Ed Rep, would like to take an exam, the exam *must not* be mailed to you. Please set up a proctor for your company by completing the attached form. All students enrolling for that same exam must enroll in that same exam site.

**INVOICING** – **Companies will be invoiced for enrollment fees**. An invoice will be produced based on your paper exam enrollments as they appear in LOMA's LMS. The invoices will be sent in **September 2019**. **Payment will be due upon receipt of invoice**.

**PROMOTIONAL MATERIALS ORDER FORM** – If you need more catalogs or promotional materials, fax the **Promotional Materials Order form** directly to PBD at 770-280-4150.

**EXAMINATION SCHEDULE** – The **November 2019** Exam Schedule is included with these instructions. Please refer to it to ensure students are not enrolled for multiple examinations administered at the same time.

**HOLIDAYS AND CLOSINGS** – Check the Exam Schedule to note if your company will be closed for a national or company holiday on the day of an examination. Do not allow students to enroll for examinations scheduled for that day.

**NAME CHANGES AND CORRECTIONS** – For names to appear correctly on awards earned this November, name corrections must be made by **November 20, 2019**. You or the student can make name changes in the student's online record.

**COURSE EXTENSIONS** – Students with Course Extensions from the **May 2019 Exam period** will need to re-enroll for the same exam in this cycle or forfeit the Extension.

**MAILING OF EXAMINATIONS** – **November 2019** examinations will be mailed in **October** and should be received by the proctors by **October 22, 2019**. Ed Reps, please make sure all secondary locations receive their examinations by this date.

## ENROLLING STUDENTS VIA LOMA'S LEARNING MANAGEMENT SYSTEM (LMS)

1. Go to <https://learning.loma.org> to access the LMS. If you have forgotten your Ed Rep Login ID or Password, click "Forgot your login ID?" or "Forgot your password?". The information will be sent to your email on record.
2. Locate a student's record:
  - **If the student has never enrolled in a LOMA exam**, click "**Create Account**", on the login main page to create a new student record.
    - i. Enter your Organizational Number on the Registration screen and complete the other fields to create an account.
    - ii. You will need to log back in as the Ed Rep after creating the record.
  - **If the student has enrolled in a LOMA exam recently**, search for the student by clicking on the "**Educational Representative**" tab, then click the "**People**" tab.
  - **If the student has not enrolled for a LOMA exam recently**, and you are unable to locate the record, please contact [education@loma.org](mailto:education@loma.org) so the record can be transferred to the LMS.
3. After locating the student through the "**Educational Representative**" tab and "**People**" Search function, click the **Learning Catalog** in the dropdown menu, under the 'ACTION" column, by that student's name.
4. Search for the **course by the name or number**. Locate the paper exam **in the preferred language**. Click **Add to Cart**.
5. Choose the site for the exam and click **Save**.
6. Continue to enroll all students. Then click the **Shopping Cart** at the top of the page to purchase the courses.
7. To purchase the course(s)
  - Confirm your billing address and click **Save**.
  - Click **Check Out** then enter your payment information and click **Next**.
  - Accept the Terms and Conditions by checking the box. Then click **Buy Now**. Print your receipt for your records.
8. You may confirm your enrollments the following day. To confirm the enrollments, go to <https://edreptools.loma.org>. Select your organization(s) from the Organization list. In the Report Type, select "**Current Enrollments**". Click "**View/Refresh Report**".
9. Most courses include study materials with the enrollment. But you can order study materials through Professional Book Distributors (PBD) at [www.lomabookstore.com](http://www.lomabookstore.com)

## ENROLLING STUDENTS VIA LOMA'S BATCH ENROLLMENT

You may also use our Batch Enrollment feature at <https://edreptools.loma.org> to enroll one or more students.

## ELECTRONIC ENROLLMENT OPTIONS

You may enroll students for the **November 2019** paper examinations by submitting an electronic file, providing your company has the **minimum of 50 enrollments** for the period. The electronic enrollment must be submitted in an email attachment sent to [education@loma.org](mailto:education@loma.org).

The electronic enrollment is completed on a MS Excel spreadsheet.

If you are interested in using the electronic enrollment option, please send an email to the Office of the Registrar at [education@loma.org](mailto:education@loma.org). You will receive further, detailed instructions on the electronic enrollment option, as well as a sample enrollment spreadsheet for you to use.

Please **do not create your own spreadsheet** for the enrollment. You must use the template that LOMA provides you to complete the enrollment.

The deadline to use the electronic enrollment option is **August 23, 2019**. The final enrollment file must be submitted as an email attachment to the Office of the Registrar by this date.

*Your company will be invoiced in **September 2019**.*

## FREQUENTLY ASKED ENROLLMENT QUESTIONS

**How many exams can I sign up for?** There is no limit established by LOMA for the number of exams a student can take, but your company may have restrictions. Just make sure you do not enroll for two exams that are scheduled at the same time.

**I have a meeting the day of the exam. Can I take it at another time?** No. LOMA's exams must be given at the scheduled exam time.

**Can I cancel the enrollment if I decide not to take the exam?** Enrollments can only be cancelled prior to the enrollment deadline of **August 23, 2019**.

**What if I need this course for Agent CE hours?** LOMA no longer offers CE credits.

**What is my Test ID?** Students may use a LOMA assigned Test ID number or request the Login ID at the login page of LOMA's Learning Management System.

**How do I find out what course(s) I have already taken?** Your company's Educational Representative will have a record of the exams you have completed. You can also access your student record online on LOMA's Learning Management System.

**What if I do not know my password?** You should use the "Forgot your Password?" function at the LOMA Management System's login screen. Your e-mail address must be stored in your record in order to use this function. Or, you can e-mail [education@loma.org](mailto:education@loma.org) with your name, Test ID number, and date of birth to request a password.

**What if I want to take my exam at a LOMA Exam Center?** Consult the Third-Party Exam Center Directory to find a center nearby. Enter that Center's code during enrollment or search for a Third-Party Exam Center in your area by location. Your exam will be sent directly to the Third-Party Exam Center and your Admission Form will be emailed to you.

**What's the difference between a Primary Organization (Home Office), a Secondary Location (Branch Location) and a Third-Party Exam Site (Exam Center)?** The Primary Organization (Home Office) is considered to be the location where your company's Educational Representative is located. A Secondary Location (Branch Location) is any other office of the company, but the Ed Rep is located at the home office. A Third-Party Site (Exam Center) is a company which has agreed to administer exams for students from outside their company



## SECONDARY LOCATION FORM

Use this form for adding or updating your company's Secondary Location office information. Fax this completed form to: LOMA's Office of the Registrar at **770-984-6415**. You may make photocopies of this form.

**PAGE 1 OF 2**  
**COMPLETE BOTH PAGES OF THIS FORM**

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### INFORMATION PROVIDED BY:

Name: \_\_\_\_\_ Company Number: \_\_\_\_\_

Company Name: \_\_\_\_\_ City/State/Province/Country: \_\_\_\_\_

Phone Number: (\_\_\_\_) \_\_\_\_\_ Date: \_\_\_\_\_

Secondary Location Information: **Add New Location**  **Change Existing Location**

Secondary Org ID Number\*: \_\_\_\_\_

Secondary Location Office Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City/State/Province/Country: \_\_\_\_\_ Zip/Postal Code: \_\_\_\_\_

Phone: (\_\_\_\_) \_\_\_\_\_ Ext. \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_\_

\*New Location – Org ID will be created by LOMA

Existing Location – Please use LOMA's LMS to retrieve your Org. ID.



**SECONDARY LOCATION FORM  
PROCTOR REGISTRATION INFORMATION**

**PAGE 2 OF 2  
COMPLETE BOTH PAGES OF THIS FORM**

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**COMPLETE THIS INFORMATION FOR EACH PROCTOR WHO IS ADMINISTERING EXAMINATIONS AT A  
SECONDARY OFFICE LOCATION AT YOUR COMPANY.**

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PROCTOR'S GIVEN NAME: \_\_\_\_\_

LAST NAME: \_\_\_\_\_

LOMA Login ID or Test ID NUMBER: \_\_\_\_\_

TITLE: \_\_\_\_\_

PHONE: \_\_\_\_\_

FAX: \_\_\_\_\_

E-MAIL: \_\_\_\_\_

DATE OF BIRTH (MM-DD): \_\_\_\_\_ GENDER: \_\_\_\_\_

**EXAM MAILING ADDRESS:** (ONLY COMPLETE IF DIFFERENT FROM SECONDARY LOCATION OFFICE ADDRESS)

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SECONDARY OFFICE LOCATION NAME: \_\_\_\_\_

STREET ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE/PROVINCE: \_\_\_\_\_

ZIP/POSTAL CODE: \_\_\_\_\_ COUNTRY: \_\_\_\_\_

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**PLEASE FAX BOTH PAGES TO LOMA'S OFFICE OF THE REGISTRAR AT 770-984-6415.**



## 2019 LOMA Promotional Materials Order Form

Contact LOMA:

General Phone:

1-800-ASK-LOMA,  
Option 1

1-800-275-5662,  
Option 1

1-770-984-3761

Website:

[www.loma.org](http://www.loma.org)

Email:

[education@loma.org](mailto:education@loma.org)

### Your order

Item Type	Item Code	Quantity	LOMA Education Promotional Materials
Brochure	ACS		Associate, Customer Service™ Brochure
Brochure	AIRCB		Associate, Insurance Regulatory Compliance™ Brochure
Brochure	FLMI/ALMI		Associate, Life Management Institute™ and Fellow, Life Management Institute™ Brochure
Brochure	TCHAR		Take Charge of Your Career Brochure
Brochure	TCHAR/FSRI		Fellow, Secure Retirement Institute Brochure
Catalog	EDCT/2019		2019 LOMA Education and Training Catalog
Flyer	2019CONFFLYER		2019 LOMA Conferences Flyer
Poster Tube	POS TUBE		Large Poster Tube for LOMA

### Information about you

Name		Title	
Your company's LOMA Organization number		Company name	
Shipping address			
City	State or Province	Country	Postal or ZIP code
Phone number (extension or direct line)			Date
Email address			

Return completed form  
by email or fax to:  
PBD Worldwide  
Fax: 770-280-4150  
Email: [LNH@pbd.com](mailto:LNH@pbd.com)





## November 2019 Examination Schedule

All examinations must be administered according to LOMA's Official Schedule.

Examinations administered at other times or dates will not be accepted by LOMA for grading.

LOMA Courses		DATE	TIME
LOMA 280	(Principles of Insurance)	MONDAY Nov. 4	9:00 a.m. to 11:00 a.m.
LOMA 290	(Insurance Company Operations)	TUESDAY Nov. 5	9:00 a.m. to 11:00 a.m.
LOMA 301	(Insurance Administration)	WEDNESDAY Nov. 6	9:00 a.m. to 11:00 a.m.
LOMA 307	(Business and Financial Concepts for Insurance Professionals)	THURSDAY Nov. 7	9:00 a.m. to 11:00 a.m.
LOMA 311	(Business Law for Financial Services Professionals)	FRIDAY Nov. 8	9:00 a.m. to 11:00 a.m.
LOMA 320	(Insurance Marketing)	MONDAY Nov. 4	1:00 p.m. to 3:00 p.m.
LOMA 357	(Institutional Investing: Principles & Practices)	WEDNESDAY Nov. 6	1:00 p.m. to 3:00 p.m.
LOMA 371	(Risk Management and Product Design for Insurance Companies)	FRIDAY Nov. 8	1:00 p.m. to 3:00 p.m.

\* Students should arrive at least 15 minutes before the scheduled exam time.

\* Please note – this schedule is for English exams only. Exams in other languages may have a different number of questions or will be given a different amount of time for the exams. Consult the LOMA Education and Training Catalog for details.