



Navigate With Confidence

## Enrolling Learners in LOMA Courses

### Using LOMA's Learning System

Ed Reps can use LOMA's Learning System to enroll learners with existing LOMA accounts. New learners in your organization will need to create an account before enrolling in any LOMA learning.

#### Select the learner:

1. Log in to [LOMA's learning system](#).
2. Click Manage > People from the home page. [VIEW SCREENSHOT](#)
3. Enter the learner's Name, Test ID, Login ID, or Email in the Search field, then click the search icon (magnifying glass). [VIEW SCREENSHOT](#)
  - o Additional search options are available by clicking "See more search criteria."
4. For the user you wish to enroll, select Learning Catalog from the dropdown menu and click Go. [VIEW SCREENSHOT](#)

#### Select the course:

1. Use the Search function or Categories in the Ed Rep Catalog to locate the course in which you wish to enroll the learner. [VIEW SCREENSHOT](#)
2. Select the course title. [VIEW SCREENSHOT](#)
  - o If the selected course offers multiple testing options, click **Instance Schedule** to select the learner's preferred testing option. [VIEW SCREENSHOT](#)

→ The **Self-Proctored Media Type** features end-of-module or end-of-course examinations that are integrated into the course content as part of the learning experience. While these exam components are delivered in a self-proctored (non-supervised) environment, system controls prevent learners from accessing the course materials while taking the exam components. [VIEW SCREENSHOT](#)

→ The **I\*STAR Media Type** features a comprehensive end-of-course examination that must be delivered in an approved proctored (supervised) environment via LOMA's cloud-based I\*STAR exam delivery system. [VIEW SCREENSHOT](#)

3. Click **Add to Cart**.

4. If you selected the I\*STAR Media Type, you will be prompted to also select the preferred **Exam Site**. The Exam Site is the physical location where the learner will sit for their proctored I\*STAR exam. [VIEW SCREENSHOT](#)
  - To include 3<sup>rd</sup> Party Exam Sites, select the checkbox and click the Search icon.
5. Click Save.
6. Repeat the above steps to add additional courses and/or learner enrollments.

### Complete your purchase:

1. Click the shopping cart icon in the upper right corner of your screen.
2. Verify that the correct learner(s) and course(s) are shown. [VIEW SCREENSHOT](#)
3. Enter your internal Accounting Code if needed and your LOMA provided Discount Code(s) if applicable, and click Apply.
4. Verify the price, then click Checkout.
5. Select your preferred payment method. [VIEW SCREENSHOT](#)
  - **Bill My Company** - If you have set up direct billing with LOMA, an account code (or codes) will appear next to the 'Bill My Company' field. To use this option, ensure that the radio button next to the 'Bill My Company' field is selected, then choose the correct account code. Click 'Save' to continue.
  - **Credit Card** – To pay using a credit card, select the radio button next to the 'Credit Card (PayFlow Link)' option. Click 'Save' to continue.
6. Click Use this payment method.
7. Verify the Payment Method, Billing Address, and Order Summary. [VIEW SCREENSHOT](#)
8. You must **Accept the Terms and Conditions** before clicking Place Order. [VIEW SCREENSHOT](#)
9. For credit card transactions, you will be redirected to a secure third party web site for payment. Enter all required fields for the credit card transaction. Once you have provided all of the required information, click "Pay Now" to continue.
10. You will see an **order confirmation** notification, order number, and receipt when the order has been processed. Click View Orders to see the details of the order. [VIEW SCREENSHOT](#)
11. The enrolled learner(s) will receive an email confirmation notifying them of their enrollment.

Screen shots are provided on the following pages to help guide you as you navigate LOMA's learning system.

For additional assistance, please reach out to the LOMA Contact Center at [education@loma.org](mailto:education@loma.org).

## Screenshot #1

LOMA Learn Manage Catalog Search Catalog

People

LOMA  
Navigate With Confidence  
www.loma.org

My Designations  
Completed: 0 Started: 9  
View All

Announcements  
LMS Upgrade coming soon!  
Date: 8/16/2022  
View All

## Screenshot #2

LOMA Learn Manage Catalog Search Catalog

Transfer User

Search  
Search Users User Search  
> See more search criteria

## Screenshot #3

LOMA Learn Manage Catalog Search Catalog

Transfer User

Search  
test User Search  
> See more search criteria

Last Name	First Name	Proctor	Ed Rep	Organization	Email	Location	Test ID	Action	Info
tester082322c	tester082322c	No	No	LOMA Test Org (8888880)	tester082322c@loma.orgx	Atlanta, Georgia, US	020336018E	Learning Catalog Go	i

Showing 1 to 1 of 1 rows

# Screenshot #4

LOMA Learn Manage Catalog Search Catalog

Manage / tester082322c tester082322c / Ed Rep Catalog

## Ed Rep Catalog

LOMA 371

Browse by

- LOMA 998 - DL Test PDC Designation Course
- LOMA 371.10.12 - Textbook for LOMA 371-Risk Management and Product Design for Insurance Companies, Second Edition Product
- LOMA 371 - Risk Management and Product Development for Life Insurance Companies Designation Course
- LOMA 290 - 보험 회사 운영 (Korean) Designation Course
- LOMA 290 - Pengoperasian Perusahaan Asuransi (Bahasa Indonesia) Designation Course

See all results for "LOMA 371"

Distribution Development (2)	Finance/Accounting (97)	Health Insurance (72)	Investment (1)
Life Insurance (192)	Management/Leadership (59)	Marketing (35)	Operations/Administration (120)
Producer Development (1)	Property/Casualty Insurance (10)	Recruiting (1)	Regulatory/Compliance (95)
Reinsurance (53)	Retirement (50)	Sales (60)	Sales Effectiveness (3)
Technology (2)	Underwriting (65)	Virtual Work (1)	

# Screenshot #5

 Learn Manage Catalog Search Catalog   0   EE

Manage / tester082322c tester082322c / Ed Rep Catalog / Search Results

## Search Results

113 results for LOMA 371 in Catalog

Categories

- Life Insurance (91)
- Finance/Accounting (86)
- Regulatory/Compliance (72)
- Business Skills (69)
- Customer Service (58)
- Show 10 more

Content Type

- Designation Course (99)
- Product (7)
- Professional Designation (4)
- Short Online Course (2)
- Short Online Collection (1)

Course Provider

- LOMA (105)
- None (8)

Cost

- Free

Showing items in: [English \(US\)](#) , [Spanish \(Latin America\)](#) , [French \(Canada\)](#) , [Portuguese \(Brazil\)](#) , [Chinese \(Traditional\)](#) , [Arabic](#) , [Indonesian](#) , [Chinese \(Simplified\)](#) , [Thai](#) , [Korean \(Change\)](#)

Show available content only

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	<b>LOMA 998 - DL Test PDC</b> Designation Course LOMA 998 - DL Test PDC English (United States)	<b>\$770.00</b>
	<b>LOMA 371.10.12 - Textbook for LOMA 371-Risk Management and Product Design for Insurance Companies, Second Edition</b> Product In Finance/Accounting, Annuities, and 6 more (Show All) Item Number 371.10.12. ISBN 978-1-57974-392-5. This is the assigned textbook for LOMA 371: Risk Management and Product Design for In ... English (United States)	<b>\$160.00</b>
	<b>LOMA 371 - Risk Management and Product Development for Life Insurance Companies</b> Designation Course In Finance/Accounting, Annuities, and 6 more (Show All) Overview Solvency and profitability are critical for any insurer, especially in times of sustained low interest rates. Between chang ... English (United States)	<b>\$770.00</b>
	<b>LOMA 290 - 보험 회사 운영 (Korean)</b> Designation Course In Underwriting, Finance/Accounting, and 11 more (Show All) 개요 생명보험회사의 조직과 관리, 회사 운영에 대해 설명합니다. 상품 개발, 홍보, 운영에 관한 구체적인 내용에 대해서도 다루고 있습니다. 이를 통해, 회사내에서의 각각의 역할에 대한 이해를 도울 수 있습니다. 연구 자료 구매에는 코스 ... 한국어(대한민국)	<b>\$670.00</b>
	<b>LOMA 290 - Pengoperasian Perusahaan Asuransi (Bahasa Indonesia)</b> Designation Course In Underwriting, Finance/Accounting, and 11 more (Show All) Ikhtisar Pembahasan secara meluas berbagai cakupan disiplin spesialisasi di dalam pengoperasian perusahaan asuransi Jiwa, seperti: Akt ... Indonesia (Indonesia)	<b>\$670.00</b>

## Screenshot #6

The screenshot shows the LOMA website interface. At the top, there is a navigation bar with the LOMA logo, 'Learn', 'Manage', and 'Catalog' menus, and a search bar. Below the navigation bar, the breadcrumb trail reads 'Manage / tester082322c tester082322c / Ed Rep Catalog / LOMA 371 - Risk Management ...'. The main content area features a dark blue header with the course title 'LOMA 371 - Risk Management and Product Development for Life Insurance Companies' and the subtitle 'In 1.0 English (United States) Designation Course'. To the right of the header are two buttons: 'Enroll to get started' and 'Instance Schedule'. A green arrow points from the 'Instance Schedule' button in the header to the 'Instance Schedule' tab in the breadcrumb trail below. The 'Instance Schedule' tab is active, and the 'Save' button is visible. The main content area is titled 'Description' and contains an 'Overview' section. The overview text states: 'Solvency and profitability are critical for any insurer, especially in times of sustained low interest rates. Between changes in the overall economic environment and in technology, life insurance companies must pay particular attention to new and emerging risks and shifting customer preferences. Risk Management and Product Development for Life Insurance Companies explains that both risk management and product development are cross-functional endeavors that affect the whole company and the two activities are interconnected. With a holistic picture of risk management and the entire product development process, learners will understand more about the reasoning behind the company's decisions, the structure of a well-designed product, and how their own responsibilities contribute to the achievement of company financial goals. Study Materials Risk Management and Product Development for Life Insurance Companies ISBN 978-1-57974-484-7 Copyright © 2021 LL Global, Inc. All rights reserved.'

## Screenshot #7

The screenshot shows the LOMA website interface, similar to Screenshot #6. The breadcrumb trail is 'Manage / tester082322c tester082322c / Ed Rep Catalog / LOMA 371 - Risk Management ...'. The main content area features a dark blue header with the course title 'LOMA 371 - Risk Management and Product Development for Life Insurance Companies' and the subtitle 'In 1.0 English (United States) Designation Course'. To the right of the header are two buttons: 'Enroll to get started' and 'Instance Schedule'. Below the header, there are two tabs: 'Overview' and 'Instance Schedule'. The 'Instance Schedule' tab is active, and the 'Save' button is visible. The main content area is titled '2 scheduled instances' and has a 'Sort by' dropdown menu set to 'Date'. There are two instances listed:

Instance Name	Media Type	Delivery Date	Course Materials	Cost	Buttons
LOMA 371 Self-Proctored English	Self-Proctored	Access ends 6 month(s) after enrollment	LOMA 371 Self-Proctored Course Portal, Risk Management and Product Development for Life Insurance Companies Online	Your Cost: \$770.00	Add to Cart
LOMA 371 I*STAR English	I*STAR	Access ends 6 month(s) after enrollment	LOMA 371 Proctored Course Portal, Risk Management and Product Development for Life Insurance Companies Online	Your Cost: \$770.00	Add to Cart

A green arrow points from the 'Add to Cart' button for the 'LOMA 371 I\*STAR English' instance to the right.

## Screenshot #8

Select Exam Site ✕

Please select an Exam Site and Select Save to continue with your enrollment process. To locate additional Exam Sites, select the checkbox to include 3rd party exam sites.

Include 3rd Party Exam Sites

Exam Site Number	Exam Site Title	Exam Site Address	Exam Site Type
<input checked="" type="radio"/> 02989	LOMA Test Org	6190 Powers Ferry Rd, #600, Atlanta, Georgia, 30339, UNITED STATES	PRM

Showing 1 to 1 of 1 rows

## Screenshot #9

LOMA Learn Manage Catalog Search Catalog

Title	Quantity	Accounting Code	Price
LOMA 371 I*STAR English Enrollment for tester082322c tester082322c <small>Designation Course</small>	1 Remove	<input type="text"/>	\$770.00

Discount Code(s)

Subtotal (1 Items): \$770.00  
Discounts: -\$0.00  
Shipping and Handling: \$0.00  
Estimated Taxes: \$0.00

**Estimated Order Total: \$770.00**

## Screenshot #10

LOMA Learn Manage Catalog Search Catalog Q 1 ? EE

Payment Method

Bill My Company

**DLTESTAC**  
Account # DLTESTAC

Paid by Check

Credit Card (PayFlow Link)

**Use this payment method**

Subtotal (1 Items): \$770.00  
Discounts: -\$0.00  
Shipping and Handling: \$0.00  
Taxes: \$0.00

**Order Total: \$770.00**

Billing Address

Order Summary

## Screenshot #11

LOMA Learn Manage Catalog Search Catalog Q 1 ? EE

Payment Method Edit

**DLTESTAC**  
Bill My Company  
DLTESTAC

Billing Address Edit

This address will be used to calculate your sales tax.

6190 Powers Ferry Road  
Atlanta, GA 30339  
UNITED STATES

Order Summary Edit

Title	Quantity	Accounting Code	Price
<b>LOMA 371 I*STAR English</b> Designation Course	1		<b>\$770.00</b>

Accept Terms and Conditions **Place Order**

# Screenshot #12

 Learn ▾ Manage ▾ Catalog Search Catalog    0   EE ▾

Thank you for your order! 

### Order #329063 Receipt

You can assign, transfer, download, or enroll in online items from this page, or the [Orders](#) page.

Title	Quantity	Accounting Code	Price
<b>LOMA 371 I*STAR English</b> Enrollment for tester082322c tester082322c Designation Course	1		<b>\$770.00</b>

Paid By

**DLTESTAC**  
Bill My Company  
Account #DLTESTAC

Subtotal (1 Items):	\$770.00
Discounts:	-\$0.00
Shipping and Handling:	\$0.00
Taxes:	\$0.00
<b>Order Total:</b>	<b>\$770.00</b>

 [View Orders](#)