

## Guide to Using the Online System

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#### IMPORTANT NOTES:

- When using the online system, any application that requires a fee will not be received by us if you do not complete the payment process.
- After clicking 'Submit Application' you will be taken to the Confirmation page. You may see a message that your application is submitted but not considered complete. This is standard language just to let you know it is not considered complete until staff reviews it. If you've completed the application and uploaded any required documentation, you can **Logout** at this point.
- **Naming Files to be Uploaded.** Please ensure **to name scanned files in a manner that clearly identifies the item being uploaded.** For example, if uploading a fingerprint receipt, a good name would be "FP Receipt", or "FP Receipt for Jane Doe". A bad name would be "JBCC", "123456789.jpg".

#### Basic How To's:

- 1) **How to Apply for a New Certification or Registration:**  
On the main page for the [online system](#), click the link for a **First Time Applicant** and follow the

instructions accordingly from there. You must complete the application for new certification or registration and pay any application fees as well.

- a. **Court Reporter Applicants Only:** If applying for Provisional or Apprentice certification, you must select that from the Certifications options displayed on the application. Otherwise, if applying for full certification, you'd select Certified Shorthand Reporter from the option displayed.
- b. **Guardianship Certification Applicants Only:** If applying for Provisional certification, you must select that from the Certifications options displayed on the application. Otherwise, if applying for full certification, you'd select Certified Shorthand Reporter from the option displayed.

2) **How to Apply to Renew:**

Log in to your online profile and click the **Renew** link on the **What Do You Want to Do** menu of your home page.

3) **How to Apply for CE Approval:**

Log in to your online profile and click the **CE Approval Request** link on the **What Do You Want to Do** menu of your home page. Note: If the course is already approved (i.e., it already has a JBCC program #), you do not have to apply for CE approval.

A course outline must be submitted with each request for approval as well as copies of the speaker bios. The course outline must contain the following information:

- a. Describe course content (i.e., detailed description of each session of the program)
- b. Indicate the time allotted to each segment (i.e., the start and end time of each session of the program for in-person courses or using quarter hour increments for online courses).
- c. The date and location of the course
- d. Any special category sessions must be clearly identified on the outline as well (i.e., Ethics, TX Rules, or Legislative Update).

**If you have multiple resumes to submit, please upload them as one complete file** versus multiple individual files. For example, scan and upload all bios as one complete pdf file.

**When entering the course location, you must do the following:**

- For online courses, enter the website in the “**Course Location**” and “**Web Address**” fields. Skip the City, State, and Zip fields.
- For all other courses, enter the location (i.e., City) in the “**Course Location**” field. Select the State in the designated field. Skip the City and Zip fields.

4) **How to Apply for an Exam (Court Interpreters, or Guardians only):**

**First-Time Applicants** (those who have not applied with us before):

A) Create your online profile following the instructions in section I of this guide.

B) Go to your profile home page and click the **Apply for Exam** link on the **What Do You Want to Do** menu. Follow the instructions accordingly from there.

**Existing Applicants (i.e., those who've applied with us before):**

Log in to your online profile and click the **Apply for Exam** link on the **What Do You Want to Do** menu of your home page. Follow the instructions accordingly from there.

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## **I. REGISTERING AN ACCOUNT**

### **Existing Licensees:**

\*\*You must use the activation code we issued to register an account. If you did not receive one, and you are **not** a new applicant, please email us to receive your code.

- 1) Go to our [online system](#)
- 2) In the “**Existing Certification**” section, click on the “**Click Here**” link
- 3) In the “**Program**” field, select your certification program (*i.e.*, *Court Reporter, Court Interpreter, Guardian, or Process Server*)
- 4) Select “**Individual**” in the ‘**Entity Type**’ field (for individual licensees) **or** “**Business Entity**” (for court reporting firms)
- 5) Enter your certification/file# in the “**Certification #**” field **or** Enter your last name in the “**Last Name**” field. (Note: **do not enter your number and your last name. You must choose one or the other.**)
- 6) Enter your activation code in the “**Activation Code**” field
- 7) Click ‘**Next**’ to go to the User Registration page
- 8) Update your contact information (if it is not current)
- 9) In the “**Online Account Information**” section, type in the **Login Name** and **Password** you want to create for your account
- 10) Click “**Register**”, then you’ll be taken to the Home page of your account.

### **First-Time Applicants**

- Go to our [online system](#)
- In the “**First Time Applicant**” section, click on the “**Click Here**” link to apply for a new certification.
- On the “**Initial User Registration**” page, enter all required fields (*i.e.*, name, DOB, address, etc.)
- In the “**Online Account Information**” section, type in the **Login Name** and **Password** you want to create for your account
- Click “**Register**”, then you’ll be taken to the application for certification preliminary step page. Provide all requested information on this page, then click **Next** to be taken to the actual application for certification
- Complete all pages of the application (*i.e.*, each tab of the application). When you get to the last page, the attestation page, click **Submit Application** to be taken to the payment portal and pay the application fee. Click **Pay Now** and follow the instructions accordingly from there. After you’ve paid, you’ll be redirected to the confirmation page of the application. At this point, you can view/print your application summary and your payment receipt if you choose. (Note: this is the only chance you’ll have to view/print these items.)

### **II. TRACK STATUS/CONFIRM RECEIPT/SEE UPLOADED DOCUMENTS:**

1. Log in to your account
2. Under the ‘**What do you Want to Do**’ menu, click on ‘**View Pending Online Applications**’.
3. When you get to the list of pending online apps, click on the ‘**View Details**’ link of the application you want to check.
4. You will see any non-mandatory attached documents (*i.e.*, *Additional Supporting Documents*) in the “**View/Attach**” column. To see any mandatory documents, click on the “**Mandatory Required Document(s)**” link.  
Note (0)= nothing attached (1)=1 document attached
5. You will see your application status in the “**Current Step**” of the ‘**Application Details**’ section.

### **III. SEARCH FOR LICENSEES:**

- Near the bottom, on the left side of the screen (under the USER LOGIN section), you will see “SITE LINKS”
- The very first item under Site Links says, “To Search for Certified Court Reporter or a Reporting Firm: Click Here” (*Note: this language will reflect the certification program you are in, such as Licensed Court Interpreter, Certified Guardians, or Certified Process Server.*)
- Click on the ‘Click Here’ link
- In the “Program” field select your certification program
- In the ‘Entity Type’ field, select ‘Individual’ for (Court Reporters, Court Interpreters, Guardians, or Process Servers) or ‘Business Entity’ for Court Reporting Firms.
- You can search by name, certification # (in the Certification # field), or certification type
- If you click on the “(+)” by Address Information, you can also search by City, County, Zip, or phone #
- Once you’ve established your criteria, click ‘Search’...or...
- Once you’ve established your criteria, click ‘Generate Excel’ to see their contact information.
  - Open the Excel document and you’ll see their information.

**Note(s):**

- If you do not know who you are searching for, if you just want to see everything, press “Search” to see what comes up.
- Also, you can generate a list in Excel format by clicking on the ‘Generate Excel’ button. You can save the excel and sort to your liking.

**IV. SEARCH FOR APPROVED CONTINUING EDUCATION COURSES:**

- Near the bottom, on the left side of the screen (under the USER LOGIN section), you will see “SITE LINKS”
- The very first item under Site Links says, “To search for an approved Continuing Education Course for Court Reporter: Click Here” (*Note: this language will reflect the certification program you are in, such as Licensed Court Interpreter, Certified Guardians, or Certified Process Server.*)
- Click on the ‘Click Here’ link
- In the “Program” field select your certification program
- You can search by course title, provider name, dates offered, or Type.
- Once you’ve established your criteria, click ‘Search’

**Note(s):**

- If you do not know what you are searching for, or if you just want to see everything in the system, press “Search” to see what comes up.
- Any time you cannot find it by the course name, try by the provider name and that should pull up anything approved for that provider. You can scroll through the list to find the course you need and select from that point.
- Whenever you are searching a system (be it a database, spreadsheet, or google), sometimes you must tweak how you’re searching. For example, if you’re looking for a seminar called “ABC’s of Court Reporting” presented by “Cinderella’s CE Seminars of Texas”, but you can’t find it by name, try a partial search of the name of the course (i.e., “Cinderella’s”), or a partial name of the provider (i.e., “ABC’s”) and don’t enter anything else (i.e., no dates, etc.). Sometimes less is more.
  - For example, enter just the first word of the course title in the **Course Title** field. **Leave all other fields blank** and hit **Search**.

**V. ORDER REPLACEMENT CERTIFICATION CARD/ WALL CERTIFICATE:**

1. Log in to your account
2. Under the **'What do you Want to Do'** menu, click on **'General Fee Remittance'**
3. Click on the item you are ordering (i.e., card or certificate)
4. Click **'Next'**
5. Enter/verify all requested information on the **'Personal Information'** tab
6. Click **'Next'**
7. Verify/update any changes on the **'Address Information'** tab
8. Click **'Next'**
9. Under the 'Issue Copy' column on the **'Certification Information'** tab, select Yes or No (to indicate whether or not you want a copy of the card/certificate sent to you in addition to the hard copy that will be mailed.)
10. Click **'Next'**
11. Read the Attestation page, then check the box by the declaration
12. Click **'Submit Application'**
13. On the **'Fee Detail'** page, click **'Pay Now'**
14. Complete the payment process. (NOTE: if you do not pay, we will not receive your application.)

#### **VI. UPDATE NAME:**

1. Log in to your account
2. Under the **'What do you Want to Do'** menu, click on **'Change Name'**
3. Under the 'Application Type', make sure the **"Application for Updating Name on Certification"** is checked (i.e., is bulleted)
4. Click **'Next'**
5. Enter your new full legal name (last name, first name, and middle name)
6. Check the appropriate box indicating the reason for name change
7. To attach your documentation in the **'Mandatory Required Document(s)'** section, click on the **'Documents (0)'** link
8. Click **'Add'**
9. Click on **'Choose File'** to locate the file on your computer to be uploaded. Once you have selected your file, you will see it in the **'Document'** column.
10. Click **'Upload'** to attach it. (You should see **'Documents (1)'** to indicate 1 file was uploaded. You can see what was uploaded by clicking on the **'Documents (1)'** link.)
11. Read the Attestation page, then check the box by the declaration.
12. Enter your name in the **'Name'** field
13. Enter the Date in the **'Date'** field
14. Click **'Submit Application'**
15. After you submit your application you'll be taken to the Confirmation page. Note: You will only see your attachments if you click the **"Mandatory Required Document(s)"** link. The Documents link on the row for 'Additional Supporting Documents' will show **"(0)"** because no docs were attached using that link as no additional documents are required. You can logout at this point.

#### **VII. UPDATE CONTACT INFORMATION:**

1. Log in to your account
2. Under the **'What do you Want to Do'** menu, click on **'Update Profile'**
3. Update all of your contact information
4. Click **'Save'**
5. **Logout**

### **VIII. REPORT CE/UPLOAD CERTIFICATES ON THE 'EDUCATION DETAIL' PAGE OF RENEWAL APPS:**

1. Click 'Add'
2. A "Course Detail and Information" page will open, on this page, click on the "Click Here" link next to 'Course Title' to choose the course you took.
3. After you click on the 'Click Here' link, a "Course Search" screen will come up. You can search for your course by typing in the name of the course, **or** the name of the provider **or** course name **and** provider name without entering the date you took the course.
4. Click 'Search' to locate your course on the date you took it, or within the date range of when you took it). **Note:** see section IV of this guide for tips on searching for approved CE courses.
5. When you find your course, just click on the name of it to select it.
6. Once the course has been selected, you'll be back on the 'Course Detail and Information' page.
7. Enter the date you completed the course in the 'Completion Date' field.
8. Click 'Save', then you'll be taken back to the 'Education Detail' page.
9. (Repeat the steps above if you have multiple courses to add)
10. In the "Course Certificate" column on the 'Education Detail' page, click on the "Course Certificate (0)" link to upload your certificates. The 'Document Upload' page will come up.
11. Click on 'Add'
12. Click on 'Choose File' to locate the certificate on your computer to be uploaded. Once you have selected your file, you will see it in the 'Document' column.
13. Click 'Upload' to attach it. Once attached you'll be back on the 'Education Detail' page. (Repeat steps above for each course you added.)
14. Once all have been uploaded, click 'Next' to move on to the next step in the application process.

### **IX. ATTACH DOCUMENTS TO A PENDING APPLICATION:**

- 1) Log in to your account
- 2) Under the 'What do you Want to Do' menu, click on 'View Pending Online Application(s)'.
- 3) When you get to the list of pending online apps, click on the 'View Details' link for your application.
- 4) For non-mandatory documents, click on the 'Document(s)' link in the 'View/Attach' column.
- 5) For mandatory documents, click on the 'Mandatory Required Document(s)' link, then click on the 'Documents (0)' link in the 'Document(s)' column.
- 6) It'll take you to the 'Upload Document' page to upload your document(s).
- 7) Click on 'Add'
- 8) Click on 'Choose File' to locate the file on your computer to be uploaded. Once you have selected your file, you will see it in the Document column.
- 9) Click 'Upload' to attach it. (You should see "Documents (1)" to indicate 1 file was uploaded. You can see what was uploaded by clicking on the "Documents (1)" link.)

### **X. APPLYING FOR COURSE APPROVALS (CONTINUING EDUCATION COURSE PROVIDERS):**

**Providers Applying for Approval in the System for the First Time (i.e., those who've yet to create a profile):**

- Near the bottom of the page, just above the credit card icons, you'll see "If you are a Continuing Education Course provider and need a course approval: Click Here"
- Click on the 'Click Here' link.

- Enter your provider name, address, phone #'s, emails, etc. (i.e., all fields with \* next to them).
- Enter the **Login Name** and **Password** you want to create for your provider account.
- Click '**Register**' and follow any additional prompts from there.

**Providers Already Registered in the System Applying for Approval** (i.e., those who have a profile already):

- Log in to your existing online profile
- On the **What Do You Want To Do** menu of your home page, click **CE Approval Request** and follow the instructions accordingly from there.
  - You must upload **one** document for the course outline for each CE approval form request.
    - The course outline must contain the following information:
      - a. Describe course content (i.e., detailed description of each session of the program)
      - b. Indicate the time allotted to each segment (i.e., the start and end time of each session of the program for in-person courses or using quarter hour increments for online courses).
      - c. The date and location of the course
      - d. Any special category sessions must be clearly identified on the outline as well (i.e., Ethics, TX Rules, or Legislative Update).
  - You must upload **one** document for the speaker bio(s) for each CE approval form request.
  - If you have multiple bios to include, you must scan them all as one complete pdf file and upload the one file. Do not upload multiple attachments.

**When entering the course location, you must do the following:**

- For online courses, enter the website in the "**Course Location**" and "**Web Address**" fields. Leave the City, State, and Zip fields blank. (Note: State may default to Texas. That is ok.)
- For all other courses, enter the location (i.e., City/State) in the "**Course Location**" field. Leave the City, State, and Zip fields blank.

**Note:** To confirm receipt and track the status of your applications, you must submit click on **View Pending Online Application(s)** on the **What Do You Want To Do** menu of your home page.

## **XI. UPLOADING COURSE APPROVAL DOCUMENTATION**

### **CE APPROVAL APP NOTES FOR PROVIDERS AND LICENSEES:**

- The only documentation to submit for course approvals are 1) the course outline, and 2) the speaker bios. No other documents should be submitted (*i.e., do not submit course booklets, exams, slide shows, etc.*)

### **UPLOADING DOCS FOR CE APPROVAL:**

Only two documents are required for CE approval purposes: the course outline, and the speaker bios.

If you have multiple bios to include, you must scan them all as one complete pdf file and upload the one file. Do not upload multiple attachments.

- 1) In the '**Mandatory Required Document(s)**' section,
- 2) click on the '**Documents (0)**' link in the '**Document(s)**' column.
- 3) It'll take you to the '**Upload Document**' page to upload your document(s).

- 4) Click on 'Add'
  - 5) Click on 'Choose File' to locate the file on your computer to be uploaded. Once you have selected your file, you will see it in the Document column.
  - 6) Click 'Upload' to attach it. (You should see "Documents (1)" to indicate 1 file was uploaded. You can see what was uploaded by clicking on the "Documents (1)" link.)
- Repeat these steps for Items 1 (Course outline) and 2 (Speaker resumes/credentials)

## **XII. HOW TO WITHDRAW AN APPLICATION (only for applications that have yet to be submitted):**

- 1) Log in to your profile/account
- 2) Under the 'What do you Want to Do' menu, click on 'View Pending Online Application(s)'.  
3) When you get to the list of pending online apps, click on the 'Withdraw' link for your application in the 'Action' column.
- 4) You'll get a pop-up box asking if you are sure you want to withdraw the application, click 'OK'.
- 5) Logout of your profile/account

## **XIII. RESET FORGOTTEN PASSWORD or RETRIEVE FORGOTTEN LOGIN NAME:**

- 1) Go to the [main page](#) of our online system
- 2) Next to the **Login** button, click on the **Forgot Login/Password** link
- 3) For 'Entity Type', select 'Individual' (for licensees) or 'Business Entity' (for court reporting firms)
- 4) Select your program (*i.e., Court Reporter, Court Interpreter, Guardian, or Process Server*)
- 5) Enter your CSR or CRF # in the 'Certification #' field **or** enter your Login Name in the 'Login Name' field. (**Note:** Do not enter your certification # and login name.)
- 6) Enter your email address in the 'Email' field
- 7) Click 'Retrieve Login/Password' button
- 8) You get a message saying your information has been sent to your email address.
- 9) Retrieve the forgotten information (reset password link) from your email
- 10) When you click on the link in your email, you'll be taken the page to enter a new password (twice), you will also see your login name on this page.
- 11) Click 'Save', then you'll be on the main page again. Enter your login name and new password
- 12) Click 'Login'

## **XIV. MAKING EXCEL LIST OF LICENSEES SORTABLE**

After opening the search results Excel spreadsheet, unwrapped the cells by:

1. Selecting the entire spreadsheet by clicking on the cell located to the complete left, just to the left of column A and above the number 1.
2. Right click, select Format Cells
3. Under the Alignment tab, uncheck Wrap Text
4. Click OK

From there you should be able to maneuver the columns and sort as desired.

## **XV. PRINTING PAYMENT RECEIPTS**

- 1) Log in to your online profile

- 2) On the **What Do You Want to Do** menu, click on the link to print receipts.
- 3) Locate the receipt you need, click on the Print link and follow instructions accordingly from there.

### **XVI. CONFIRMING CE DOCS ATTACHED TO PENDING RENEWAL APPS**

1. Login to your profile
2. Click on **View Pending Online Application(s)** on the **What Do You Want to Do** menu
3. Click on **View Details** link
4. On the **Checklist**, click on the **Review Continuing Education** link
5. This takes you to the **Continuing Education Detail** page of your app. Click on the **Course Certificate** link(s) to see what was uploaded.
6. If you did not upload the correct certificate, click on **Add** on the **Attached Document(s)** bar and upload the correct certificate. If you did upload the correct certificates, no further action is required.
7. In the **Comments** section, type a note of "Corrected Certificate" so staff knows to disregard the previous certificate.
8. Click **Upload** to add the correct certificate.

### **XVII. HOW TO CORRECT WRONG CE ENTERED ON RENEWAL APPLICATIONS**

**Scenario #1** (Applicant has already logged out of profile without submitting their application)

9. Login to Profile
10. Go to **View Pending Online Application(s)** on **What Do You Want to Do** menu
11. Click on **View Details** for the renewal application
12. On the **Checklist**, click on the **Review Continuing Education** link
13. On the Continuing Education Detail page, Click **Add**
14. Add the correct course and upload the correct certificate
15. On the course(s) selected in error, upload a document to it (any document) and in the Comments section of the **Document Upload** page, type in "*Delete this course, please.*"
16. Continue with your application. Once reviewed by staff, they will delete the course as requested.

**Scenario #2** (Applicant has not logged out of profile and has application open)

1. Select the correct CE course and upload the correct CE certificate to it.
2. On the course(s) selected in error, upload a document to it (any document) and in the Comments section of the Document Upload page, type in "*Delete this course, please.*"
3. Continue with your application. Once reviewed by staff, they will delete the course as requested.