



Navigate With Confidence

[Navigating LOMA's Learning System as an Ed Rep](#)

[LOMA's Learning System](#) is your single platform for participating in LOMA courses as a learner *and* for managing LOMA learning for others as an Ed Rep in your organization. Your single login will give you access to both the LEARN and MANAGE tools within the system. The following pages will help you navigate the system as a learner and as an Ed Rep.

*For instructions you can share with [learners](#) in your organization, please see the How To entitled:
[Navigating LOMA's Learning System as a Learner](#)*

As an Ed Rep logged in to LOMA's Learning System, you will see a LEARN tab and a MANAGE tab in the top-most section of the homepage. We'll talk about the LEARN section first – this is the section that pertains to you as a learner.

LEARN

Homepage:

On the homepage, you can access the Course Catalog and view your Designations, Enrolled Courses, Purchases/Receipts, and Announcements. [VIEW SCREENSHOT](#)

1. Click View All for more information in each of these sections:
 - My Designations:
 - Shows the number of designations that you have earned and have started.
 - My Learning:
 - Shows up to 5 of your most recent enrollments.
 - Purchases/Receipts:
 - Shows up to 5 of your most recent purchases.
 - Announcements:
 - Shows up to 2 of the most recent announcements.
2. To return to the homepage from any screen, click the Learn > Home menu option or click the LOMA logo image.

Catalog:

1. Enter a course or key word in the Search Catalog box (or click the magnifying glass) at the top of the homepage to access the catalog. You can also click Find More Training in the My Learning section to access the catalog.

2. The main catalog is grouped by Categories – click to expand any category, or enter a course or key word in the Search for Content box at the top of the catalog. [VIEW SCREENSHOT](#)
3. Click on a course title for additional information and to enroll yourself in the course.
4. Click the additional filters on the left (Categories, Content Type, Course Provider) to narrow your search results. [VIEW SCREENSHOT](#)

My Designations:

1. Click View All in the My Designations pane to access the Designations page. You can also access this page by clicking Learn > Transcript/Designations at the top. [VIEW SCREENSHOT](#)
 - o You can sort this page by Title, Provider, Date Obtained, or Language.
2. Click a designation title for more information about the designation and to view your progress towards that designation.
3. Click View Certificate to view and/or print a copy of any completed designation's certificate of completion.
4. The All Training tab will show all of your LOMA Professional Development, and offer additional filters (course type, enrollment status, and date range). [VIEW SCREENSHOT](#)
 - o You can save a full unofficial transcript of your LOMA Professional Development by printing or saving the All Training tab as a PDF. For an official transcript, please complete and submit [this request form](#).

My Learning:

1. To access a course you are enrolled in, go to the My Learning pane on the homepage, click on the course title, then Start or Continue. If the course isn't showing, click View All in this section. [VIEW SCREENSHOT](#)
 - o You can also access this page by clicking Learn > My Learning at the top.
2. Click Find More Training to access the complete catalog.

Transcript:

1. To view an unofficial version of your full transcript and LOMA Professional Development course history, click Learn > Transcript/Designations at the top.
 - o The All Training tab shows your entire course history with LOMA. [VIEW SCREENSHOT](#)
 - o The Designations tab shows your course history with only those courses that count toward a LOMA professional designation. [VIEW SCREENSHOT](#)
2. Print or save as a PDF using the buttons at the top to save your course history.
 - o For an official transcript, please complete and submit [this request form](#).

Purchases/Receipts:

The Purchases/Receipts pane on the homepage provides a summary of your five most recent purchases on behalf of your organization, regardless of how many courses or learners were included in that purchase.

1. Click View Details to access the Purchase Order details and to obtain a printable receipt of the actual transaction for your records. [VIEW SCREENSHOT](#)
2. Click Show More for additional details such as the payment method and tax information.

Tip #1: To view purchase details for each individual enrollment you have purchased, rather than as a purchase order summary:

1. Click on the drop down menu beside your initials or avatar in the upper right corner of the screen.
2. Select Purchases/Receipts
3. Click View Details to access the purchase history details.

Tip #2: What LEARNERS will see in Purchases/Receipts on their homepage?

If a learner purchases an enrollment for themselves, the learner will see their purchase details and receipt in the Purchases/Receipts pane on their homepage. They will not see any purchases made on their behalf by their company Ed Rep.

Announcements:

1. Click View All to access all posted announcements and to view the full message. [VIEW SCREENSHOT](#)

MANAGE

As an Ed Rep, you can also manage your organization's learners. This section describes the MANAGE tools available to you through LOMA's Learning System. All Manage tools are accessed from the Manage tab at the top of your screen.

Manage Learners:

1. From the homepage, click Manage > People.
2. Once inside the Manage People page, enter the user'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.
3. Select the Action you would like to take for the learner, then click Go. Available actions include:
 - o Edit Profile – Update a learner's User Information, Work Information, Qualifications, and Shipping Address.
 - o Learning Catalog – Access the catalog and enroll learners.

- Send Email – Send an email directly to a learner from within the LMS.
- View Designations – View a list of designations a learner has earned as well as their progress toward other designations.
- View Purchases – View all purchases made for a learner. You can also print receipts for the specified learner.
- View Transcript – View a learner’s entire course history with LOMA. Numerical scores are not available to Ed Reps, only the Pass/Fail status.

*For more details about enrolling learners in LOMA courses using LOMA’s Learning System, please see the How To entitled:
[How an Ed Rep Can Enroll Learners](#)*

*For more details about transferring learners into or out of your organization, please see the How To entitled:
[How To Transfer Learners In or Out of My Organization](#)*

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.

Screenshot #1

Learn ▾
Manage ▾
Catalog

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EE ▾

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](#)

My Learning Find More Training

Title	Started/Begins	Action
LOMA 361 Self-Proctored English <small>Designation Course</small> ■ Access expires 2/23/2023	<div style="background-color: #ccc; padding: 2px 5px; font-weight: bold;">Enrolled</div> <div style="text-align: center; font-weight: bold; font-size: 1.2em;">AUG 23 2022</div>	
ACS 101 - Customer Service for Insurance Professionals - Third Edition <small>Designation Course</small> ■ Access expires 2/23/2023	<div style="background-color: #ccc; padding: 2px 5px; font-weight: bold;">Started</div> <div style="text-align: center; font-weight: bold; font-size: 1.2em;">AUG 27 2022</div>	Hide


[View All](#)

Purchases/Receipts
















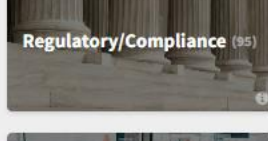






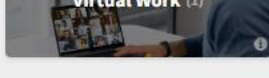
Order Date	Order #	Status	Purchased Items	Cost	Action
8/30/2022	329063	Completed	1 LOMA 371 I*STAR English	\$770.00	View Details
8/23/2022	329034	Completed	1 15-Minute Insurance Industry Overview	\$100.00	View Details
8/23/2022	329033	Completed	1 LOMA 361 Self-Proctored English	\$770.00	View Details
8/23/2022	329031	Completed	1 ACS 101 - Customer Service for Insurance Professionals - Third Edition	\$770.00	View Details

[View All](#)

Screenshot #2

Search for Content 

Browse by Category

 <p>Annuities (79)</p>	 <p>Business Skills (81)</p>	 <p>Compliance and Regulatory (5)</p>	 <p>Customer Service (97)</p>
 <p>Distribution Development (1)</p>	 <p>Finance/Accounting (97)</p>	 <p>Health Insurance (72)</p>	 <p>Investment (1)</p>
 <p>Life Insurance (192)</p>	 <p>Management/Leadership (59)</p>	 <p>Marketing (35)</p>	 <p>Operations/Administration (120)</p>
 <p>Producer Development (1)</p>	 <p>Property/Casualty Insurance (10)</p>	 <p>Recruiting (1)</p>	 <p>Regulatory/Compliance (95)</p>
 <p>Reinsurance (53)</p>	 <p>Retirement (50)</p>	 <p>Sales (60)</p>	 <p>Sales Effectiveness (3)</p>
 <p>Technology (2)</p>	 <p>Underwriting (69)</p>	 <p>Virtual Work (1)</p>	

Screenshot #3

Catalog / Search Results

Search Results

283 results in Catalog

Categories

- Life Insurance (192)
- Operations/Administration (120)
- Finance/Accounting (97)
- Customer Service (97)
- Regulatory/Compliance (95)
- Show 18 more

Content Type

- Short Online Course (123)
- Designation Course (114)
- Professional Designation (15)
- Online (9)
- Product (9)
- Show 4 more

Course Provider

- LOMA (209)
- None (28)
- LOGIQ3 (26)
- Convergent (11)
- NATG (9)


Cost

- Free

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

Show available content only


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 **ACS 100 - 客户服务基础 (Chinese Simplified)** \$385.00

Designation Course In Management/Leadership, Life Insurance, and 4 more (Show All)

课程简介 ACS100阐述了客户服务的基本原理和基本策略,介绍了客户服务型的企业文化,建立了客户服务评估的标准,还强调了培养具有奉献精神的服务员工的重要性。学习资料 购买包括通过课程门户对所有学习材料进行6个月的访问,以及根据以下文本作业参加已进行的课 ...


中文 (中华人民共和国)

 **ACS 100 - 고객 서비스의 기초 (Korean)** \$385.00

Designation Course In Management/Leadership, Life Insurance, and 4 more (Show All)

개요 ACS 100 은 금융 서비스 분야의 고객 서비스에 대한 내용을 포괄적으로 다룹니다. 탁월한 고객 서비스를 위해 필요한 지식과 스킬에 관한 정보를 제공하고 있습니다. 연구 자료 구매에는 코스 포털을 통해 모든 학습 자료에 대한 6 ...


한국어 (대한민국)

 **ACS 100.10.15 - Textbook for ACS 100-Foundations of Customer Service, Third Edition** \$111.00

Product In Management/Leadership, Life Insurance, and 4 more (Show All)

Item Number 100.10.15. ISBN 978-1-57974-448-9. This is the assigned textbook for ACS 100: Foundations of Customer Service. NOTE: Pur ...

English (United States)

 **ACS 101 - Customer Service for Insurance Professionals - Third Edition** \$75.00

Designation Course In Customer Service

Increased competition in the insurance industry has led companies to become more customer-centric and focused on improving the custo ...

English (United States)

Screenshot #4

All Training **Designations** ←

Designations (20) Print Save as PDF

Provider
All ▾
Filter

↓

Title	Provider	Date Obtained	Language	Progress	Action
AIRC	LOMA			0 out of 6 <div style="width: 0%;"></div>	
FSRI	LOMA			7 out of 8 <div style="width: 88%; background-color: #0070C0; color: white;">88%</div>	
ACS - Property & Casualty (Canada)	LOMA			1 out of 6 <div style="width: 17%; background-color: #0070C0; color: white;">17%</div>	
ALMI	LOMA			3 out of 5 <div style="width: 60%; background-color: #0070C0; color: white;">60%</div>	
ACS - Property & Casualty (U.S.)	LOMA			1 out of 6 <div style="width: 17%; background-color: #0070C0; color: white;">17%</div>	
AFSI	LOMA			0 out of 2 <div style="width: 0%;"></div>	
PCS	LOMA	6/20/2002	English (United States)	0 out of 0 <div style="width: 100%; background-color: #0070C0; color: white;">100%</div>	View Certificate
AIAA	LOMA	8/14/2002	English (United States)	0 out of 0 <div style="width: 100%; background-color: #0070C0; color: white;">100%</div>	View Certificate
FFSI Level 1 Certificate	LOMA	2/6/2004	English (United States)	0 out of 0 <div style="width: 100%; background-color: #0070C0; color: white;">100%</div>	View Certificate

Screenshot #5

[All Training](#)
[Designations](#)

All Training Print Save as PDF

Type
Status
From
To

Title	Type	Status	Score	Grade	Start Date	Completion Date	Expiration Date	Credits	Action
15-Minute Insurance Industry Overview	Short Online Course	Expired		DN	8/9/2022		8/10/2022		
ACS 101 - Customer Service for Insurance Professionals - Third Edition	Designation Course	Started			8/13/2022		2/9/2023		
LOMA 280 - Principles of Insurance	Designation Course	Enrolled			8/9/2022		8/17/2022		
LOMA 281 - Meeting Customer Needs with Insurance and Annuities - 2nd Edition	Designation Course	Enrolled			9/8/2022		9/10/2022		
LOMA 361 - Accounting and Financial Reporting in Life Insurance Companies	Designation Course	Enrolled			8/9/2022		2/9/2023		

Screenshot #6

[tester080922a](#)
[tester080922a](#) / [Purchases/Receipts](#) / [Receipt/Order Details #329089](#)

Receipt/Order Details #329089

Print

Ordered **Status** **Completed**
 SEP 8 2022 **Total Cost** \$335.00
Organization ██████████
Organization ID ██████

Invoice
 Bill My Company
 ██████████

Subtotal (1 Items):	\$335.00
Discounts:	- \$0.00
Shipping and Handling:	\$0.00
Taxes:	\$0.00
Order Total:	\$335.00

Item Details

Title	Purchased For	Cost	Item Discount	Accounting Code	Status	Actions
LOMA 281 - Meeting Customer Needs with Insurance and Annuities - 2nd Edition Designation Course Total Purchased: 1	tester080922a tester080922a	\$335.00	\$0.00		Payment Processed	

Screenshot #7

Home / Announcements

Announcements

Search for Search Type All words

LMS Upgrade coming soon!
Date: 8/16/2022

****Course Access and Other Issues Now Resolved!****
Date: 2/9/2022

****Course Access and Other System Issues**** Currently, we are experiencing system issues that impacts course access and other functions within our learning management system. We will update this announcement as soon as we have the issues resolved. We sincerely apologize for the inconvenience.
Date: 2/9/2022

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Screenshot #8

LOMA Learn Manage Catalog Search Catalog

Transfer User

Search User Search

> See more search criteria

10 Users

Last Name	First Name	Proctor	Ed Rep	Organization	Email	Location	Test ID	Action	Info
edrep082322a	edrep082322a	No	PRM	LOMA Test Org (8888880)	edrep082322a@loma.orgx	Atlanta, Georgia, US	020336021E	Edit Profile <input type="button" value="Go"/>	<input type="button" value="i"/>
edrep082322b	edrep082322b	No	SEC	LOMA Test Org (8888880)	edrep082322b@loma.orgx	Atlanta, Georgia, US	020336022E	Learning Catalog <input type="button" value="Go"/>	<input type="button" value="i"/>
edrep082322c	edrep082322c	No	SEC	LOMA Test Org (8888880)	edrep082322c@loma.orgx	Atlanta, Georgia, US	020336023E	View Designations <input type="button" value="Go"/>	<input type="button" value="i"/>
edrep082322d	edrep082322d	No	SEC	LOMA Test Org (8888880)	edrep082322d@loma.orgx	Atlanta, Georgia, US	020336024E	View Purchases <input type="button" value="Go"/>	<input type="button" value="i"/>
edrep082322e	edrep082322e	No	SEC	LOMA Test Org (8888880)	edrep082322e@loma.orgx	Atlanta, Georgia, US	020336025E	View Transcript <input type="button" value="Go"/>	<input type="button" value="i"/>