MuniEdPro®

A free service of the MSRB

Course Administrator
Quick Reference Guide

MSRB

MuniEdPro® is a suite of interactive, online courses designed specifically for municipal market participants. The courses, offered by the Municipal Securities Rulemaking Board (MSRB), provide content relevant to municipal market activities and regulations. Each MuniEdPro® course allows the learner to apply MSRB rules to real-world scenarios. Courses are available individually or through two access options, bulk or enterprise, depending on the needs of the firm.

Firms seeking a bulk access must designate a course administrator to provide employees with access to MuniEdPro® courses. This document serves as a quick reference guide for course administrators.

Adding Learners

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Course administrators will provide information on eLearners to the MSRB by submitting a bulk access course request form. The MSRB will create MuniEdPro® accounts for eLearners based on the bulk access course request form.

Fields required to complete the bulk load template:

Field	Description
Last Name	Enter the eLearner's last name.
First Name	Enter the eLearner's first name.
Email Address	Enter the eLearner's email address. This will be their MuniEdPro® user name.
Organization Name	Enter the firm name.
MSRB ID	Enter the firm's MSRB ID, if known or applicable (optional).
Function	Select the eLearner's professional function.
Title	Enter the eLearner's job title.
Telephone	Enter the eLearner's business telephone number.
Address	Enter the firm's business address.
Industry Service Time	Select applicable range.
Age	Select applicable range.

Form fields:
First Name:
Last Name:
Learner Email Address:
Organization Name:
MSRB ID:
Function: Select
Title:
Phone:
Address Line 1:
Address Line 2:
City:
State:
Zip:
Industry:
Age:

Note: All eLearners will be loaded into MuniEdPro® with a temporary password which will be provided to the course administrator. Course administrators will be responsible for providing the temporary password to all eLearners. Each eLearner will be required to change his/her temporary password and select a security question upon initial login.

Browse Courses

- From the menu bar, hover over "Courses", click "Browse Courses."
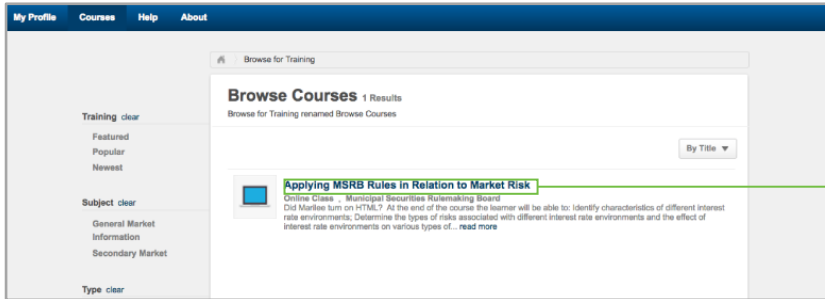
Select Courses

- Click course title.

  Note: The following information is displayed for your review: Course Description, Subjects.

- One of these options will be displayed: "Add to Cart," "Launch" or "Assign."

- Click "Launch" to start the course.

- Click "Assign" to assign the course.

Training Details

Continuing Disclosure Obligations
Online Class · Municipal Securities Rulemaking Board · 50 minutes · $0.00

Launch   **Assign**

At the end of this course, learners will be able to: 1) Identify the ongoing disclosure requirements for filing financial information and event notices with respect to the issuance of municipal securities under Securities and Exchange Commission Rule 15c2-12; 2) Understand the continuing disclosure requirements under federal securities law, and; 3) Differentiate continuing disclosure obligations of underwriters and issuers.

Price
$0.00

Credits
2

Available Languages
English (US)

Subjects
Broker-Dealers, Municipal Advisors, Municipal Entities/Issuers

- These options will be displayed: "Launch" or "Assign."

- Click "Launch" to start the course.
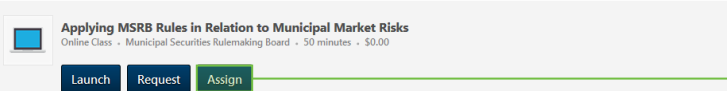
- Click "Assign" to assign the course.

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Welcome to MuniEdPro℠

The **Municipal Securities Rulemaking Board (MSRB)** offers this suite of high-quality, e-learning courses to provide relevant and up-to-date educational content for municipal market participants.

@2016 Municipal Securities Rulemaking Board | MSRB Support 202-838-1330 | MSRBSupport@msrb.org
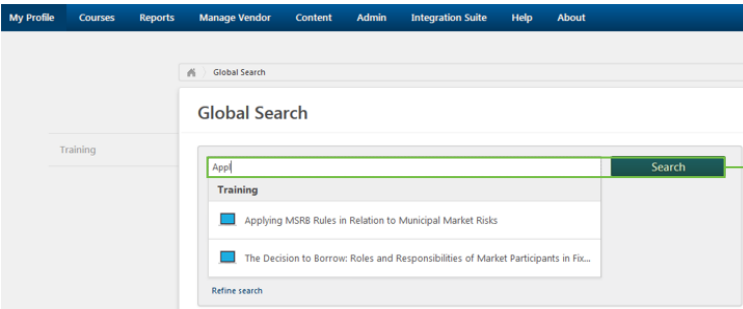
FEATURED COURSES
- The Decision to Borrow
  Roles and Responsibilities of Market Participants in Fixed Rate Primary Market Offerings
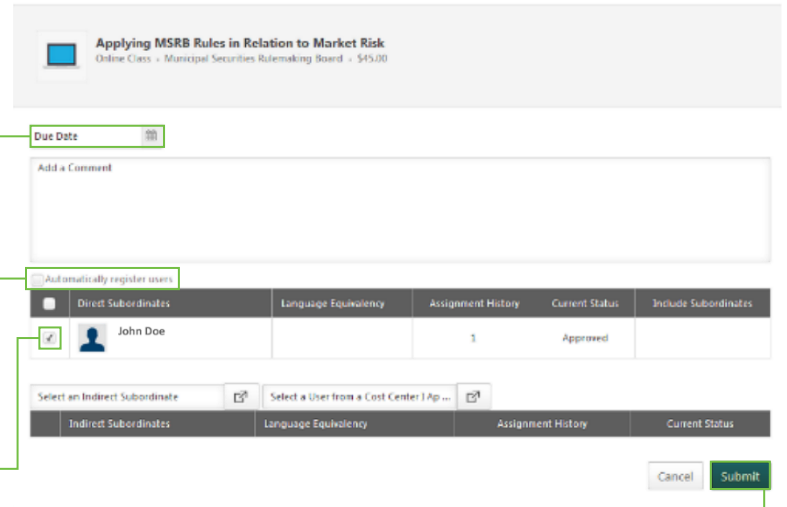- Rules and Risks
  Applying MSRB Rules in Relation to Market Risk

Browse Courses

My Courses

Pending Evaluations

OPTION 3

- Click "Browse Courses."

- Enter the course title or leave blank to view all courses

- Click "Search."

- Click "Assign."

- If assigning a due date, click calendar to select the due date (optional)

- Check the box to "Automatically register users."

- Check box next to eLearner name

- Click "Submit."

Global Search

Training

Appl   Search

Training
  Applying MSRB Rules in Relation to Municipal Market Risks
  The Decision to Borrow: Roles and Responsibilities of Market Participants in Fix...

Refine search

Applying MSRB Rules in Relation to Municipal Market Risks
Online Class · Municipal Securities Rulemaking Board · 50 minutes · $0.00
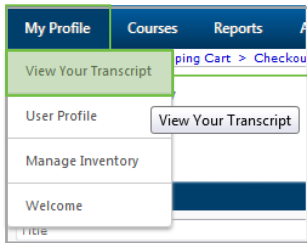
Launch   Request   Assign

At the end of the course the learner will be able to: (1) Identify characteristics of different interest rate environments; (2) Determine the types of risks associated with different interest rate environments and the effect of interest rate environments on various types of fixed rate bonds; (3) Determine the price/yield relationship for bonds in different types of interest rate environments; and (4) Apply the MSRB's rules associated with certain municipal securities transactions.
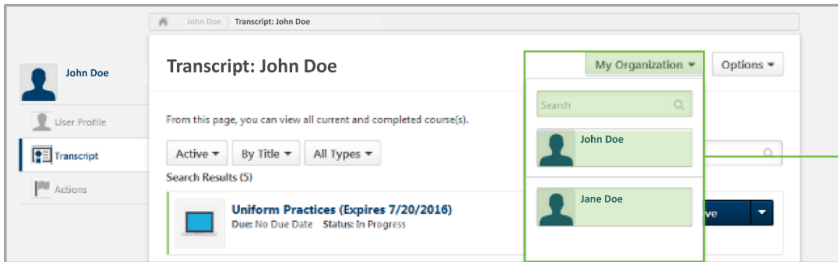
Assign Training

Applying MSRB Rules in Relation to Market Risk
Online Class · Municipal Securities Rulemaking Board · $45.00

Due Date

Add a Comment

Automatically register users

	Direct Subordinates	Language Equivalency	Assignment History	Current Status	Include Subordinates
	John Doe		1	Approved	

Select an Indirect Subordinate   Select a User from a Cost Center | Ap ...

| Indirect Subordinates	Language Equivalency	Assignment History	Current Status

Cancel   Submit

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- Hover over the "My Profile" tab.

- Select "View Your Transcript."

- Click dropdown beside "My Organization" button.

  Select individuals by:

  1. Typing eLearner's name in search field and clicking "Search"

  2. Scrolling and/or paging through the list of eLearners to select an eLearner by clicking on their name.
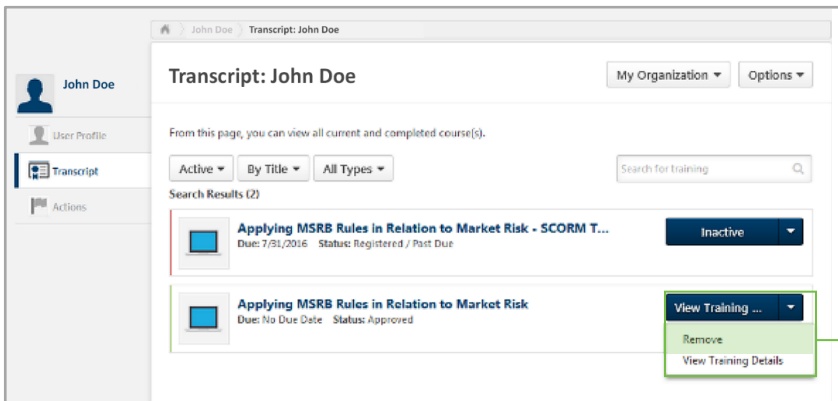
- For the course to be removed, click dropdown arrow next to "View Training" blue button beside the title of the course.

- Select "Remove."
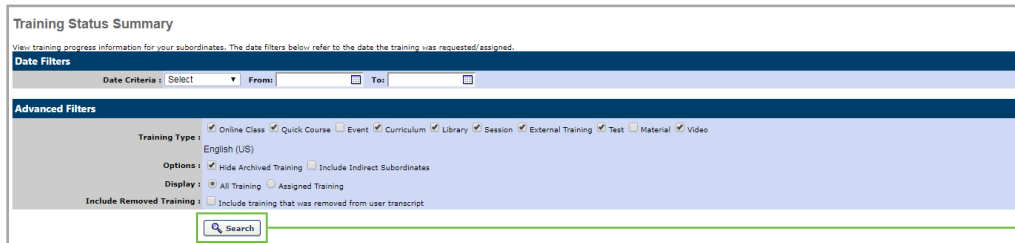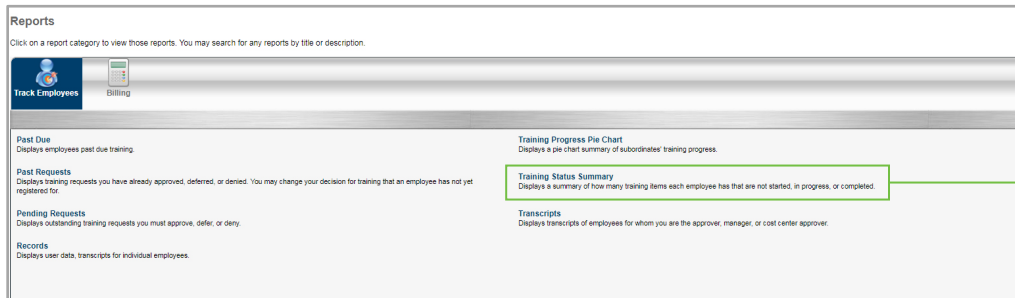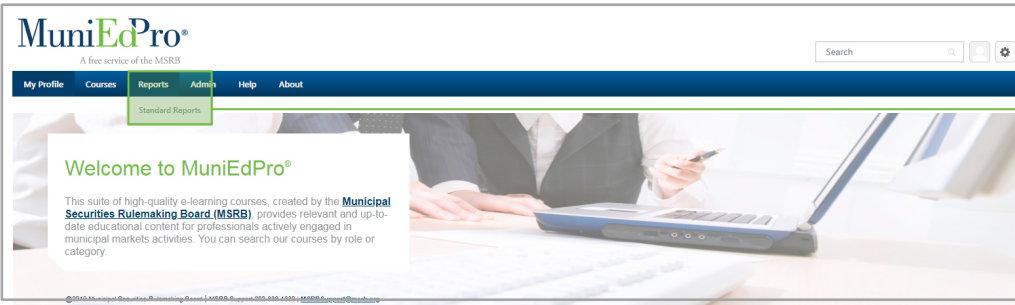
- Hover over the Reports tab in the blue menu bar at the top.
- Select "Standard Reports" from the drop-down menu.
- Select "Training Status Summary" to run a Training Status Summary report on your team's transcript.
- Click the "Search" button
- The report will generate and list all of the courses that are currently Registered, In Progress and Complete for your organization
- Click the "Export to Excel" link if you would like to export the report to Excel
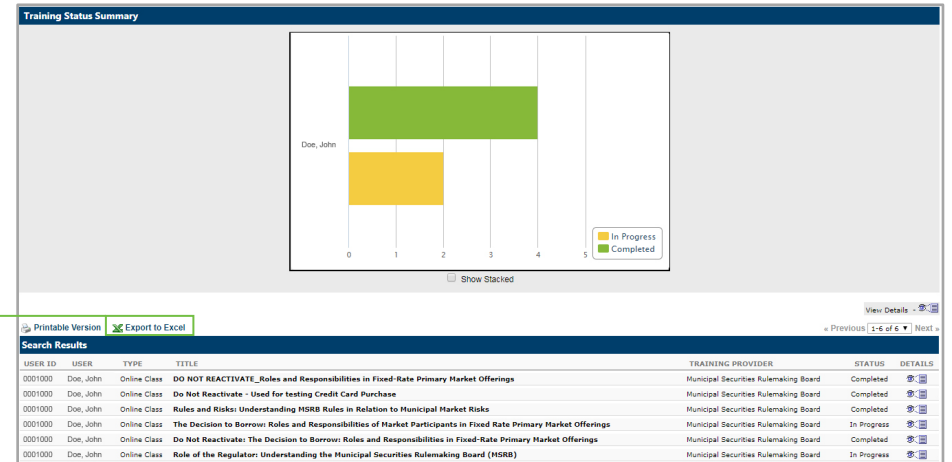
Pop -Up Blocker

If course does not launch immediately, please check your pop-up blocker. Browsers manage pop-up blockers differently. MuniEdPro® is configured to open some items in separate windows. Please work with your IT support to disable pop-up blockers or add MuniEdPro® (https://www.msrb.csod.com) to your firm's whitelist.

System Help

Online help is available for using the MuniEdPro® system. Hover over the ⚙(options icon) on the far right above the menu bar and click "Help."

Support

For further assistance, please contact MSRB Support.
Email MSRBSupport@msrb.org
Telephone 202-838-1330

MSRB