




## Step-by-Step Guide: Claiming Continuing Education Credits (CEs)

This document addresses the step-by-step process for obtaining your continuing education credits for Client Forum 2024. If you have any issues obtaining your continuing education credit, please email [training@mcb.com](mailto:training@mcb.com) for assistance.

You can access the Continuing Education Survey tool via the Client Forum mobile app or by logging into the [event website](#). Once you've accessed the tool, please follow the steps below.

### Step 1: Choose what type of education credit you would like to apply for

- Select the **Choose what type of education credit you would like to apply for** task


**CLAIMING CREDITS:**


**Credits**


To obtain approved credits, you must complete evaluations for all qualified sessions you attended.


Once you have completed your evaluations and provided the required information, you will be able to download your credit certificate immediately.

Please do not complete the final step of downloading your certificate until you have watched all desired sessions and completed the session evaluations.

**TASKS** (You have 1 left to complete out of a total 1 assigned tasks)

 Choose what type of education credit you would like to apply for:

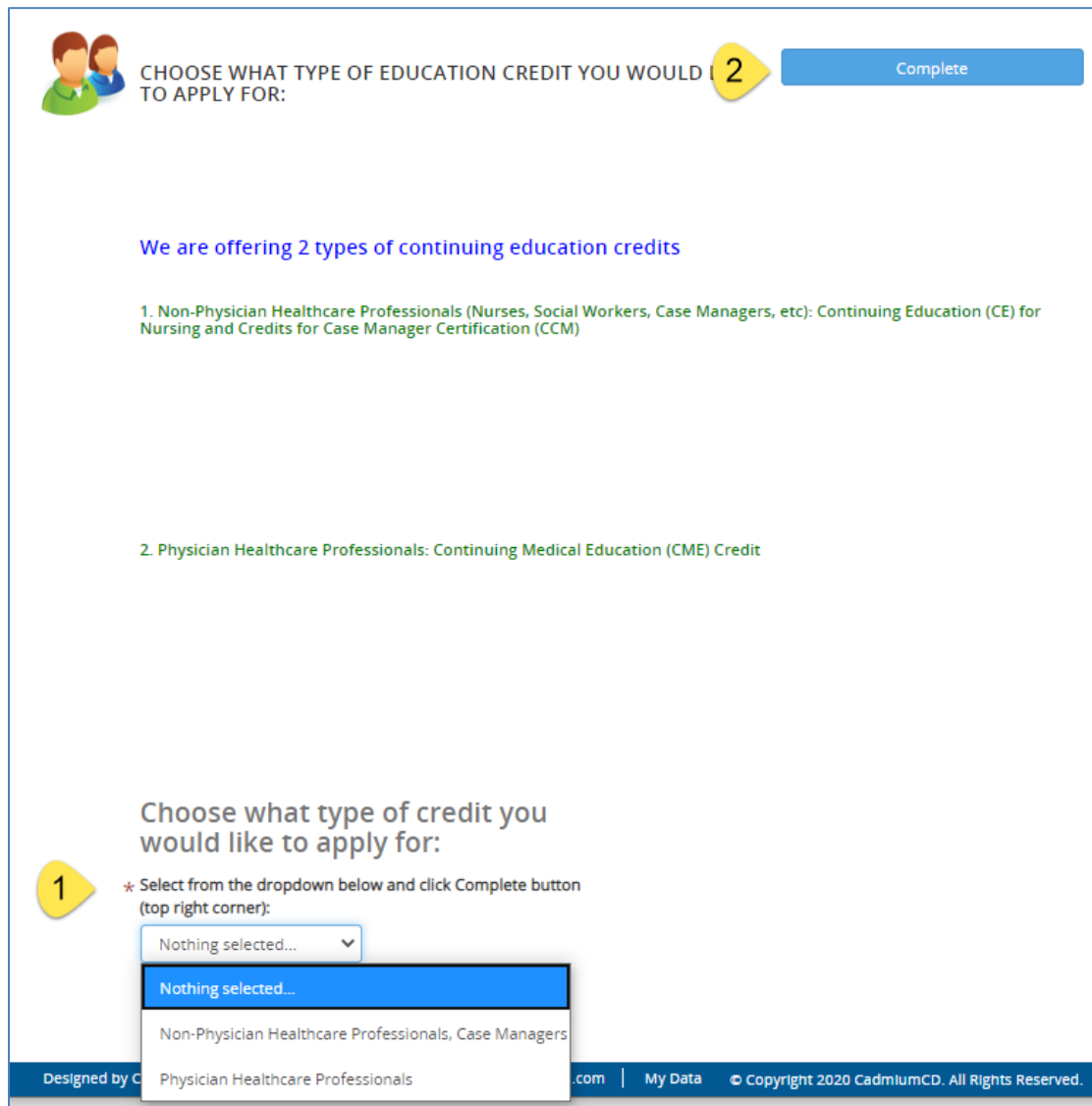
 Need Help? Review the Step-by-Step Guide

**SELECTED SESSIONS**

No sessions have been selected.

- Review the type of continuing education credit that is being offered and make your selection from the dropdown list at the bottom of the page:
  - Non-physician healthcare professionals (nurses, social workers, case managers, etc.)

- Physician healthcare professionals
- Select **Complete** button (top right corner of page)



CHOOSE WHAT TYPE OF EDUCATION CREDIT YOU WOULD LIKE TO APPLY FOR: **2** [Complete](#)

We are offering 2 types of continuing education credits

1. Non-Physician Healthcare Professionals (Nurses, Social Workers, Case Managers, etc): Continuing Education (CE) for Nursing and Credits for Case Manager Certification (CCM)
2. Physician Healthcare Professionals: Continuing Medical Education (CME) Credit

Choose what type of credit you would like to apply for:

**1** \* Select from the dropdown below and click Complete button (top right corner):

Nothing selected... ▼

Nothing selected...  
Non-Physician Healthcare Professionals, Case Managers  
Physician Healthcare Professionals

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**Please note:**

- Step 2 will be different depending on what you selected in Step 1
- Steps 3 and 4 are the same for all

## Step 2 for Non-Physician Healthcare Professionals: Enter Your Professional License Information

If you selected *Non-Physician Healthcare Professionals*,

- Select the **Enter Your Professional License Information** task


**CLAIMING CREDITS:**

**Credits**

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Once you have completed your evaluations and provided the required information, you will be able to download your credit certificate immediately.

Please do not complete the final step of downloading your certificate until you have watched all desired sessions and completed the session evaluations.

**TASKS** (You have 3 left to complete out of a total 4 assigned tasks)

- ☒ Choose what type of education credit you would like to apply for:
- ☒ **Enter Your Professional License Information**
- ☒ Complete Evaluations for Attended Sessions (CE & CCM)  
0.0 CE & CCM Credits claimed
- ☒ Download/Print Your CE Certificate (CE & CCM)
- [Need Help? Review the Step-by-Step Guide](#)

- Enter your **License Number** and **State of Licensure**
- Select **Complete** button (top right corner of page)

**ENTER YOUR PROFESSIONAL LICENSE INFORMATION** 3 [Complete](#)

Please provide your professional credentials as you would like them to appear on your Continuing Education certificate.

**Professional Details**

1 \* License Number


2 \* State of Licensure

State of Licensure (Other)

## Step 2 for Physician Healthcare Professionals: Enter Your Degree

If you selected *Physician Healthcare Professionals*,

- Select the **Enter Your Degree** task


**CLAIMING CREDITS:**


**Credits**


To obtain approved credits, you must complete evaluations for all qualified sessions you attended.


Once you have completed your evaluations and provided the required information, you will be able to download your credit certificate immediately.


Please do not complete the final step of downloading your certificate until you have watched all desired sessions and completed the session evaluations.


**TASKS** (You have 3 left to complete out of a total 4 assigned tasks)

 Choose what type of education credit you would like to apply for:


 **Enter Your Degree**

 Complete Evaluations for Attended Sessions (CME)  
0.0 CME Credits claimed

 Download/Print Your CE Certificate (CME)

 Need Help? Review the Step-by-Step Guide

- Enter your **Degree** as you would like it to appear on your Certificate of Credit
- Select **Complete** button (top right corner of page)

**ENTER YOUR DEGREE**

2 **Complete**

Please provide your information as you would like it to appear on your Certificate of Credit.


**Degree**

★ Degree

1

## Step 3: Complete Evaluations for Attended Sessions

- Select the **Complete Evaluations for Attended Sessions** task


**CLAIMING CREDITS:**


### Credits


To obtain approved credits, you must complete evaluations for all qualified sessions you attended.


Once you have completed your evaluations and provided the required information, you will be able to download your credit certificate immediately.


**Please do not complete the final step of downloading your certificate until you have watched all desired sessions and completed the session evaluations.**


**TASKS** (You have 2 left to complete out of a total 4 assigned tasks)

 Choose what type of education credit you would like to apply for:

 Enter Your Professional License Information

 **Complete Evaluations for Attended Sessions (CE & CCM)**  
0.0 CE & CCM Credits claimed

 Download/Print Your CE Certificate (CE & CCM)

 Need Help? Review the Step-by-Step Guide

You will see a truncated schedule. Expand each date to view the sessions.

- Select **Start Evaluation** to begin the evaluation for a session you attended

COMPLETE EVALUATIONS FOR ATTENDED SESSIONS (CE & CCM)

Submit to Complete Task

Expand each category, select session(s) attended and complete evaluation questions.

Sort by Date All Dates Filter sessions...

Expand

Session Title 1 Credit Start Evaluation

Expand

- Complete the evaluation by answering all questions and select **Submit** button
- Repeat this process to complete evaluations for all sessions you attended
- Once all your evaluations are completed, select **Submit to Complete Task** button

COMPLETE EVALUATIONS FOR ATTENDED SESSIONS (CE & CCM)

Submit to Complete Task

Expand each category, select session(s) attended and complete evaluation questions.

Sort by Date All Dates Filter sessions...

Collapse

Session 1 Credit Evaluation Completed


Remove This

Session 2 Credit Evaluation Completed

Remove This

## Step 4: Download/Print Your CE Certificate

- Select the **Download/Print Your CE Certificate** task


**CLAIMING CREDITS:**

### Credits


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Please do not complete the final step of downloading your certificate until you have watched all desired sessions and completed the session evaluations.




**TASKS** (You have 1 left to complete out of a total 4 assigned tasks)

- ✓ Choose what type of education credit you would like to apply for:
- ✓ Enter Your Professional License Information
- ✓ Complete Evaluations for Attended Sessions (CE & CCM)  
Credits claimed
- ✗ **Download/Print Your CE Certificate (CE & CCM)**

 [Need Help? Review the Step-by-Step Guide](#)

- Your certificate will open. You can print, save or email your certificate.


 Print  Save as PDF  Email This



**CONTINUING EDUCATION  
CERTIFICATE OF COMPLETION**

## If You Missed Any Evaluations

If you would like to complete additional evaluations for attended sessions, you can return to the Continuing Education Survey tool home page and repeat **Steps 3 and 4** as outlined above – **Complete Evaluations for Attended Sessions** and **Download/Print Your CE Certificate** tasks.


**CLAIMING CREDITS:**






### Credits

To obtain approved credits, you must complete evaluations for all qualified sessions you attended.

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Please do not complete the final step of downloading your certificate until you have watched all desired sessions and completed the session evaluations.

**TASKS** (You have 1 left to complete out of a total 4 assigned tasks)

-  Choose what type of education credit you would like to apply for:
-  Enter Your Professional License Information
-  Complete Evaluations for Attended Sessions (CE & CCM)  
Credits claimed
-  Download/Print Your CE Certificate (CE & CCM)
-  Need Help? Review the Step-by-Step Guide

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