FINRA FLEX

Quick Reference Guide – FLEX Course Assignment Upload

The information provided in this document is intended as a quick guide for how CE administrators with an active subscription to use the FLEX platform as their course delivery method can download and upload the FLEX course assignments template directly on the FLEX platform.

For delivery via FLEX Platform

When you are ready to assign courses to your users, please download and fill-out the "FLEX Course Assignment Template" spreadsheet. Please use the "FLEX Catalog Reference" to get the course title and course ID (see screen shots below).

	A	B	C	D	E	F	G	H
1	First Name	Last Name	Individual CRD#	Assigned Course Title	Assigned Course ID	Course Due Date		
2								
3								
4								
5								

Once completed, upload it back onto the FLEX dashboard (see screen shot below). Within 24 hours your users will be able to access their Firm Element assignments from their FinPro account.

If there are errors in the file upload, you will receive an error message on the bottom right of the screen (see screen shot below). You can correct the errors on your template and re-upload again to the dashboard.

If you receive an error that one of your users is not uploaded to the FLEX dashboard, it means that you need to upload that user first, prior to uploading the course assignment template. Please refer to the "FLEX User Upload" quick reference guide.
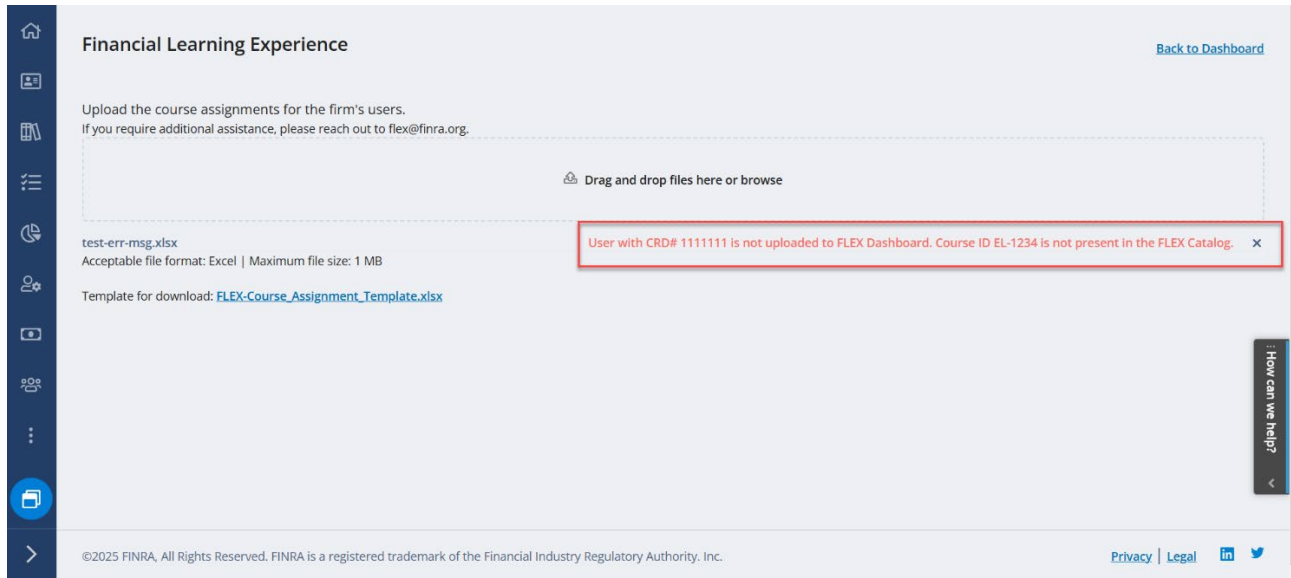
NOTE: FLEX will not send any course assignment notification to your users. You have the ability to do so through your firm's messaging system.

Once users have logged into their FinPro account, they will be able to access assigned courses through a link in the Actions (Quick Links) section at the top right (see screen shot below).
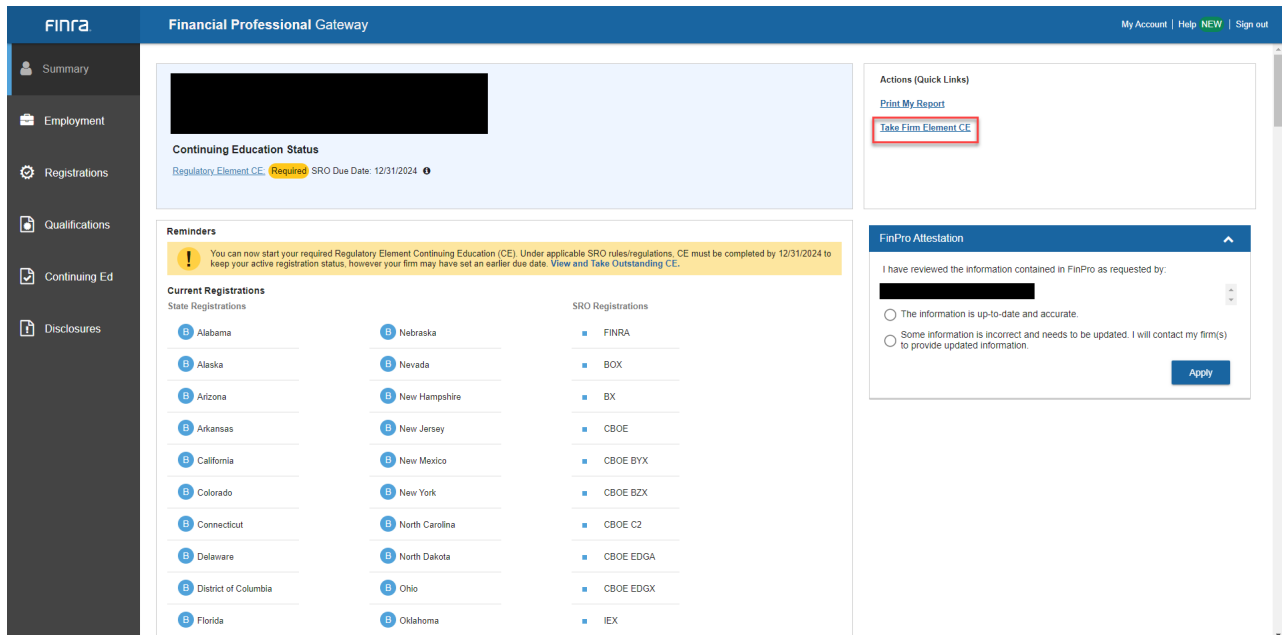
After clicking the link, users will be brought to their learning plan page on the FLEX delivery platform which will display their assigned courses and their corresponding assigned due dates.

On this page, you will find a list of Firm Element courses that have been assigned to you by your firm, as well as any applicable Regulatory Element courses that are currently in progress. Simply click on the course you want to complete. If you require additional information about the Firm Element courses that have been assigned to you, please contact your firm's training manager or send an email to **flex@finra.org**.
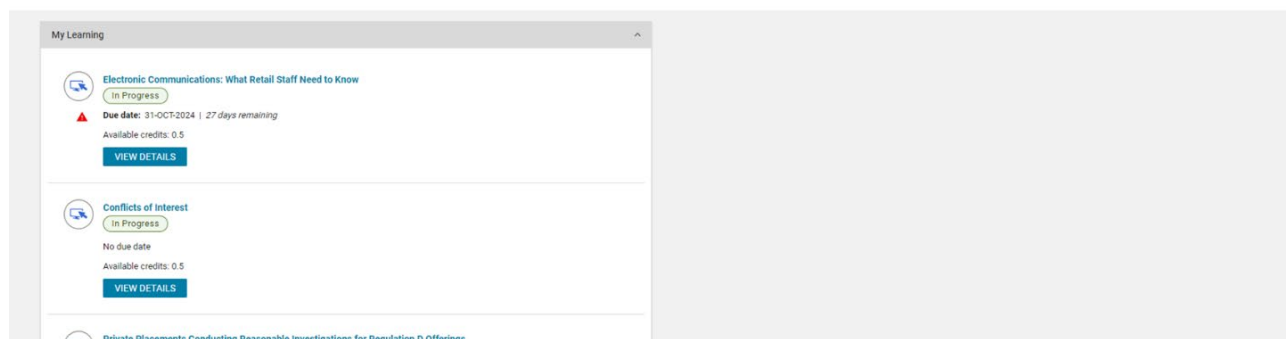
NOTE: Any Regulatory Element CE courses that the user has in progress will also appear on this page.

Please upload any additional course assignments using the same template and method. For course removal requests, send an email to flex@finra.org.