

## Quick Reference Guide – Distributing Courses Through FLEX Platform

The information provided in this document is intended to provide a quick guide for CE administrators to acquire a license to the FLEX platform via the FLEX dashboard within the FINRA Gateway.

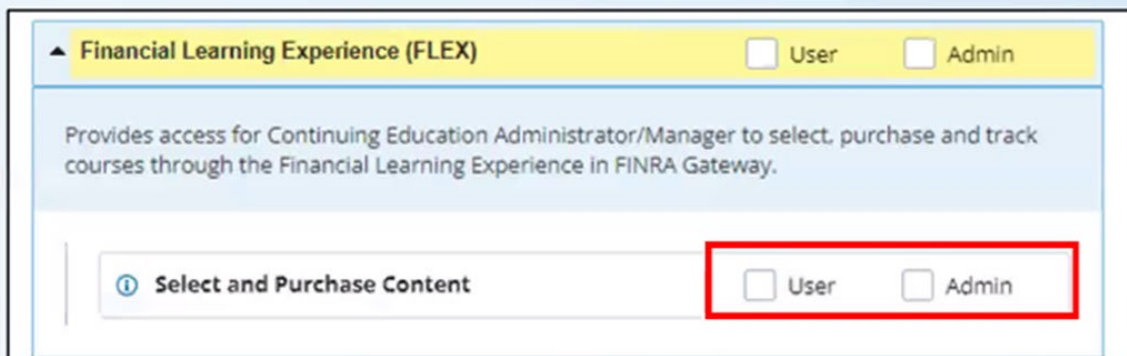
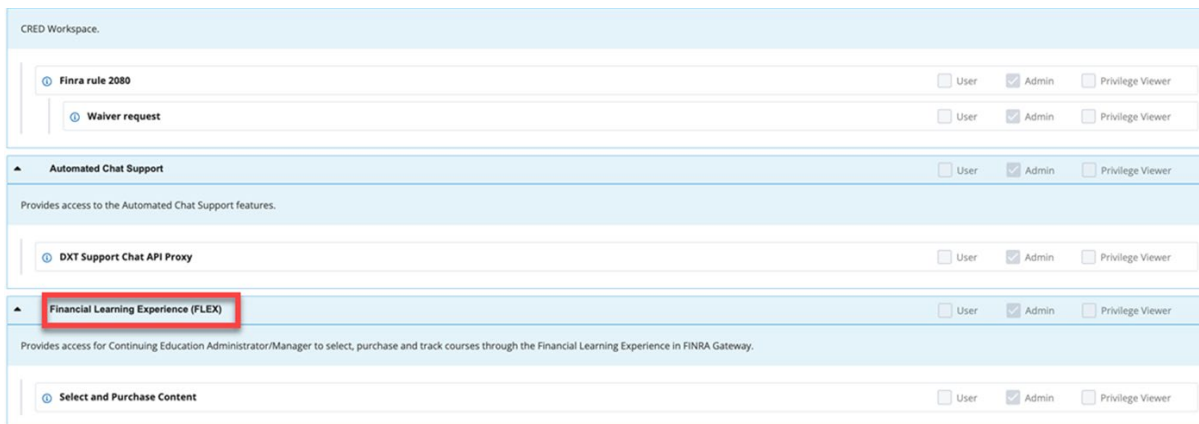
### For delivery via FLEX Platform

To gain access to the Financial Learning Experience (FLEX) dashboard within the FINRA Gateway, please contact your firm’s Super Account Administrator (SAA). They can grant you the entitlement role for FLEX. When editing entitlements, FLEX is the last privilege available to select on the list.

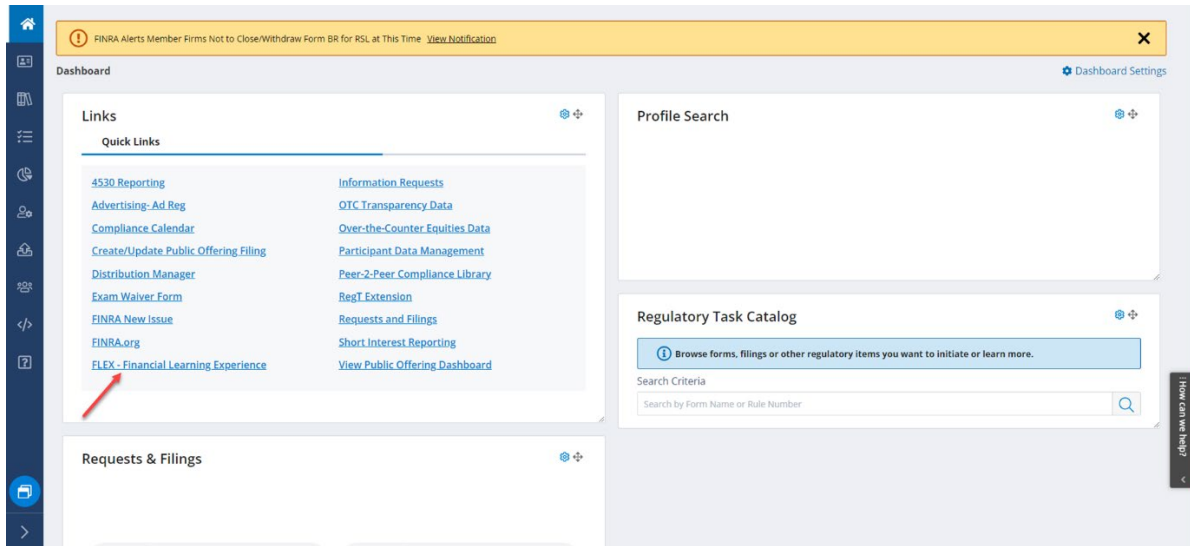
The SAA can assign the entitlement to “Select and Purchase Content” for FLEX by checking the box for “User” and/or “Admin.”

Types of entitlement roles:

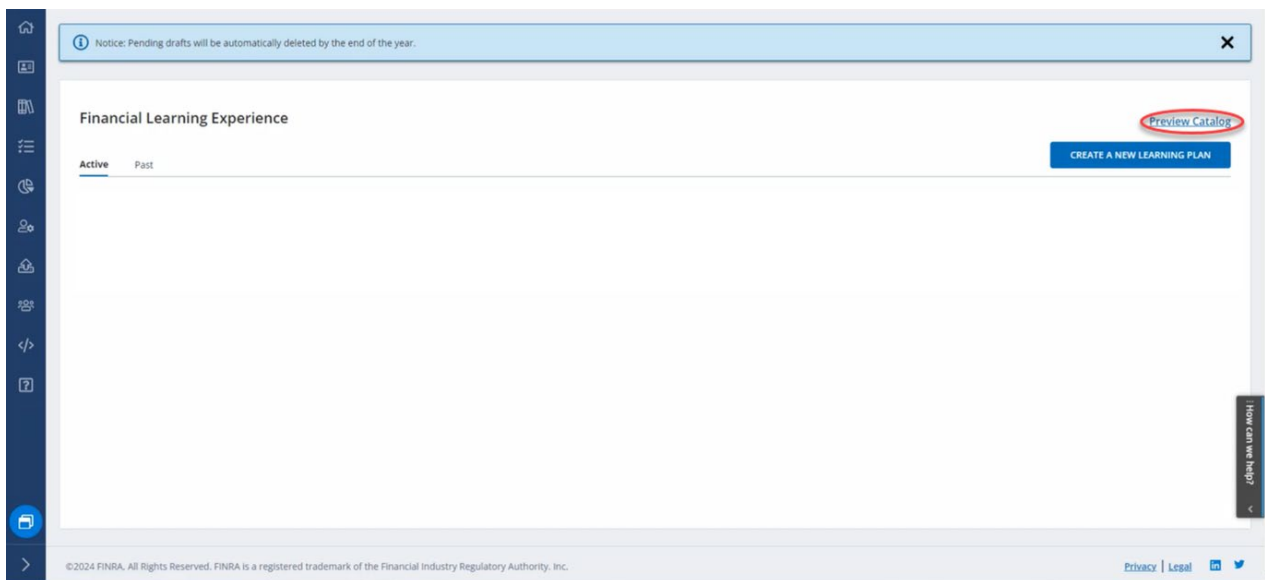
- User: Can select and purchase content
- Admin: Can grant access and create accounts, but not select and purchase content



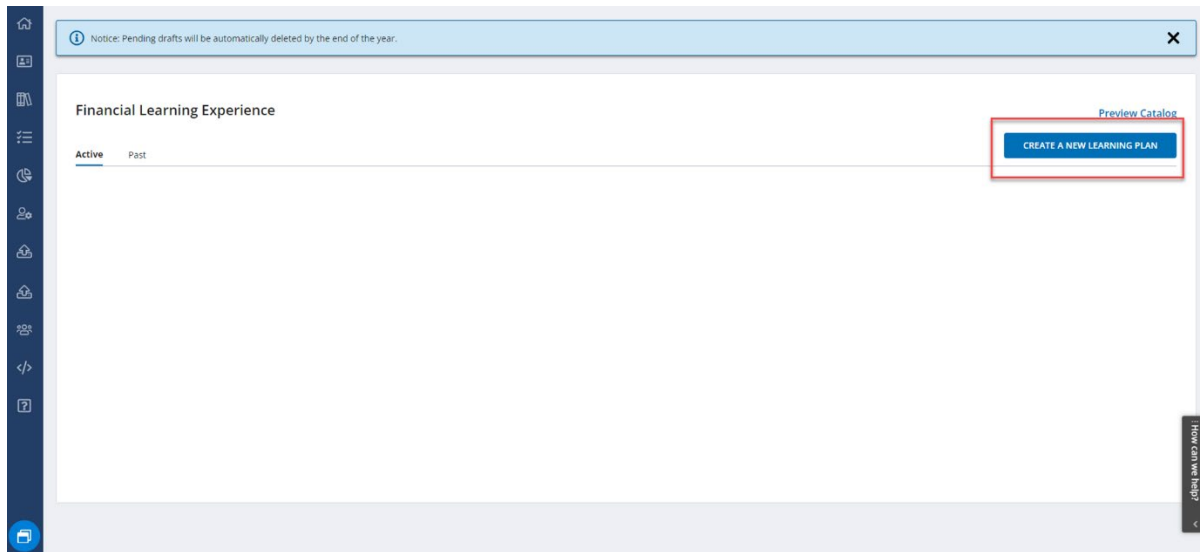
Once your FLEX entitlement is granted, you will see the “FLEX – Financial Learning Experience” link within the FINRA Gateway Quick Links section. You will click that link to access the FLEX dashboard.



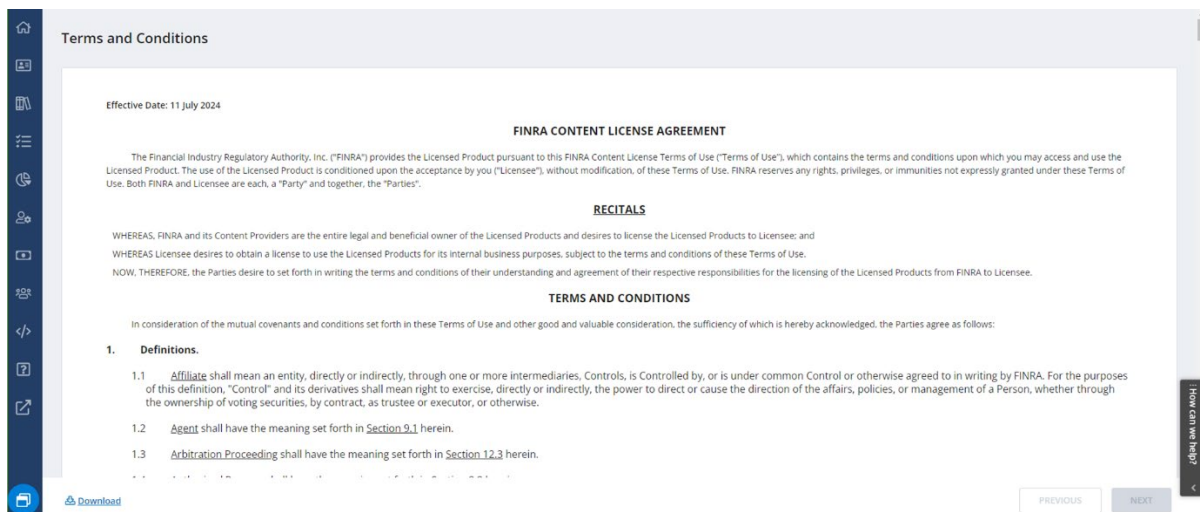
Once in the dashboard, you can start browsing the FLEX catalog by clicking on “Preview Catalog.” Please note that at this point, you can only browse the course categories and topics but are not able to launch any courses to evaluate content. An active subscription to FLEX is required to launch courses.

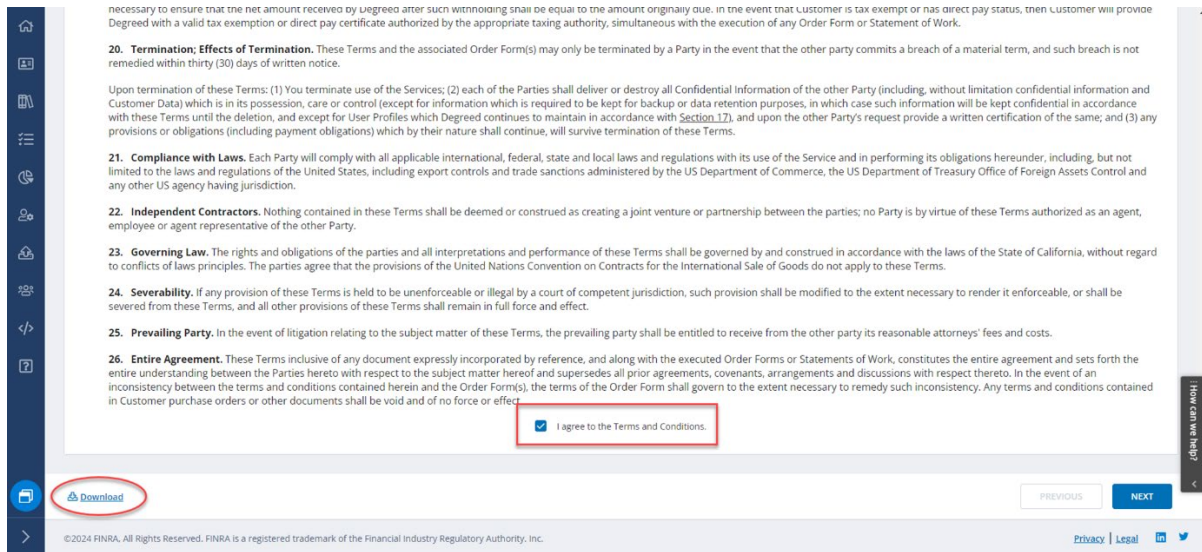


To acquire a subscription to FLEX, you will start by selecting “Create a New Learning Plan”.

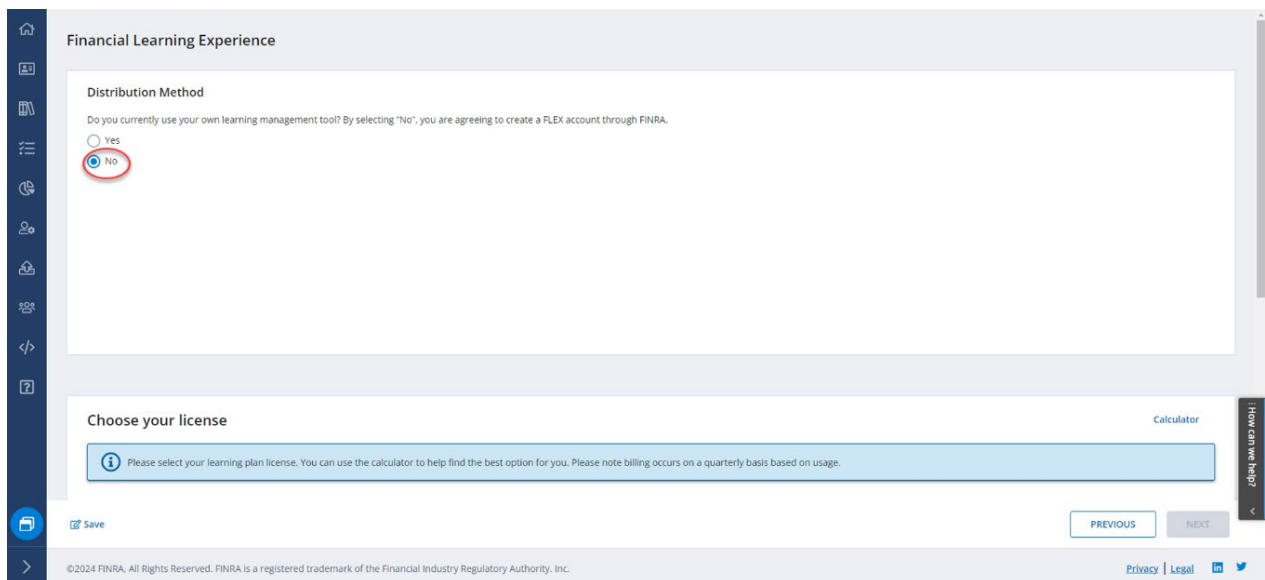


The first screen will provide you with the Terms & Conditions for use of FLEX. At the bottom of the agreement, you must select “I agree to the Terms & Conditions” to proceed. You can download the agreement for review prior to accepting the terms.





After agreeing to the terms and selecting the Next button, you will be brought to the screen to select your firm’s elected distribution method. If you wish to leverage the FLEX Platform on FINRA’s Learning Management System (LMS), select “No” on the distribution method. This will elect the FLEX platform as your distribution method.



Next on the screen you will select your license type: library or course. The license type determines how your firm will be billed for course consumption. A calculator is provided to allow you to evaluate which license would be most appropriate for your firm based on how many users and courses will be assigned to each user. The calculator will reflect the difference in price for each of the two types of licenses based on your entered criteria.

**Choose your license** Calculator

*Please select your learning plan license. You can use the calculator to help find the best option for you. Please note billing occurs on a quarterly basis based on usage.*

**Library License**  
This license will give you unlimited access to all courses in the catalog for a specified number of users.  
**\$60 per User**  
\*Volume discounts will be applied after 200 users.

**Course License**  
This license will give you access to all courses in the catalog, and you will be invoiced based on the number of courses launched.  
**\$18 per Course**  
\*Volume discounts will be applied after 1500 users.

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**CE Calculator**

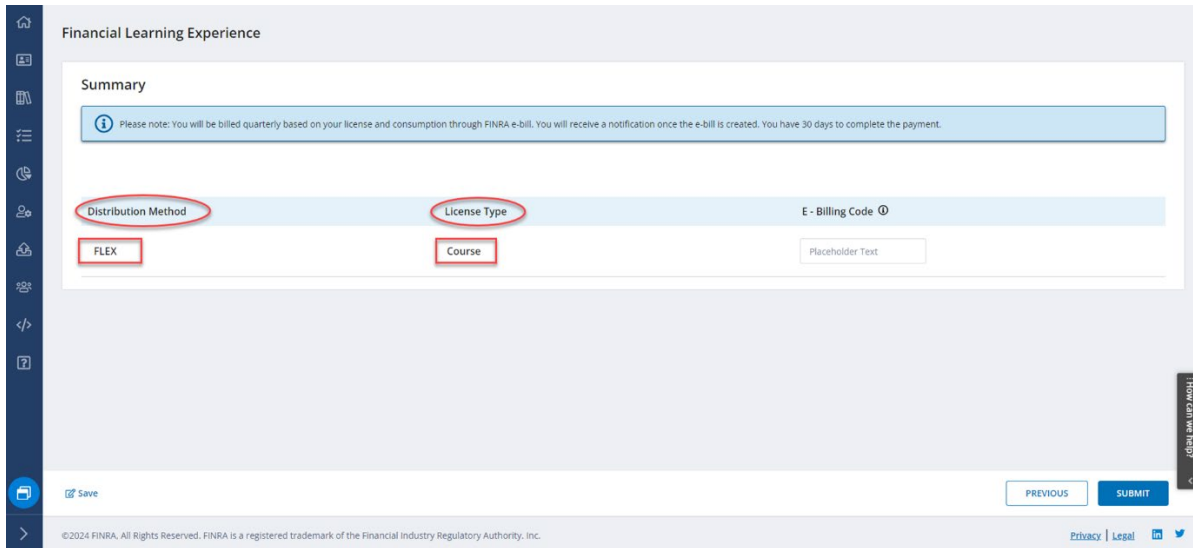
*Enter your desired amount of users and courses to see the expected amount for each license type.*

Number of users:

Average Course per User:

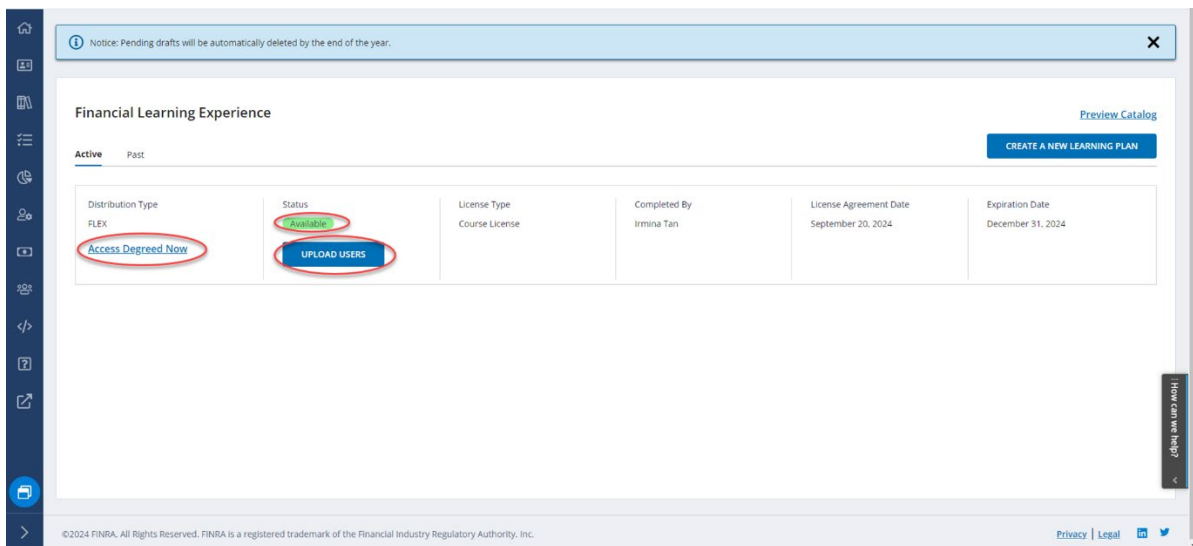
	Library	Course
Units	50	100
Cost	\$60.00	\$18.00
<b>Total</b>	<b>\$3000</b>	<b>Recommended \$1800</b>

After you have chosen your distribution method and license type, click on the Next button and a summary page of your selections will be displayed. You have the option to include any e-billing code your firm may choose to leverage. An e-billing code is not required to proceed. Once you have confirmed the information is correct, select the submit button to complete your license subscription.



After submitting, the FLEX dashboard will initially reflect a status of “Provisioning” while the firm account is being set up on the FLEX Platform.

After a few minutes, you should refresh the page and the status will then be reflected as “Available”. Once that status update occurs, an “Access Degreed Now” button to access the FLEX catalog and an “Upload Users” button will both become visible. Your subscription is now active.



Please refer to the “Quick Reference Guide – FLEX User Upload” for step-by-step instructions for uploading users.

Please let us know if you encounter any issues with acquiring your license. You can email us at [flex@finra.org](mailto:flex@finra.org) for assistance with any issues.