

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 submit the FLEX course assignments template.

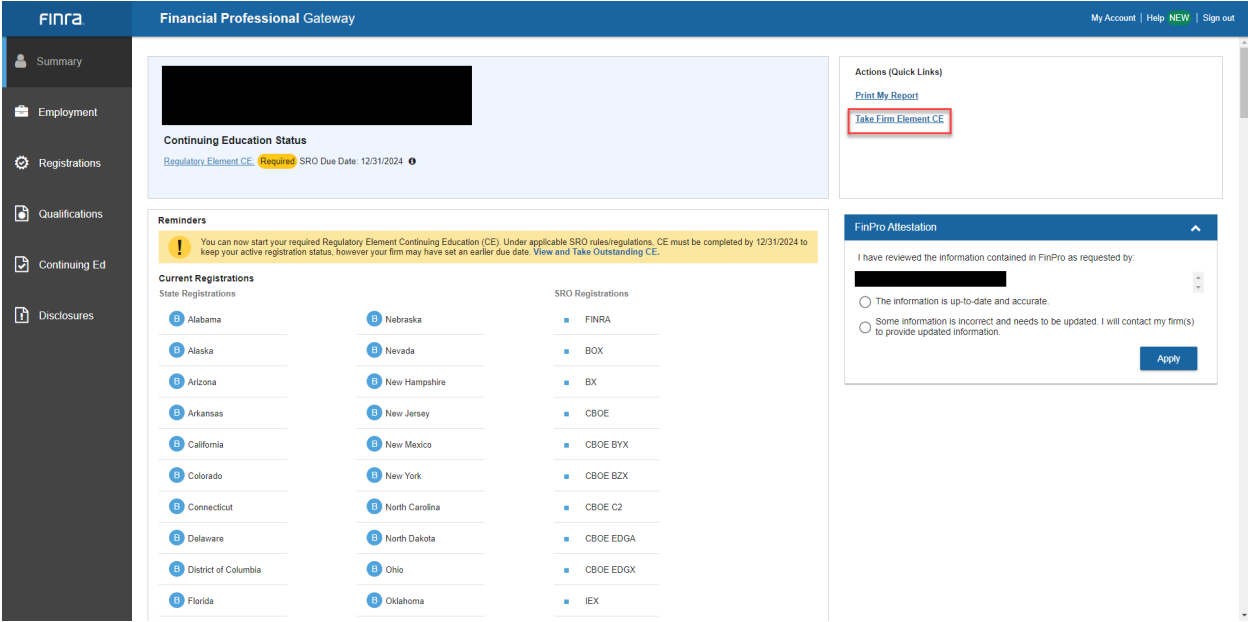
For delivery via FLEX Platform

When you are ready to assign courses to your users, please fill-out the “FLEX Course Assignment Template” spreadsheet (provided in the hyperlink below) and send it via email to flex@finra.org. Once received, course assignments will be uploaded and within 24 hours and your users will be able to access their Firm Element assignments from their FinPro account.

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.

[FLEX - Course Assignment Template](#)

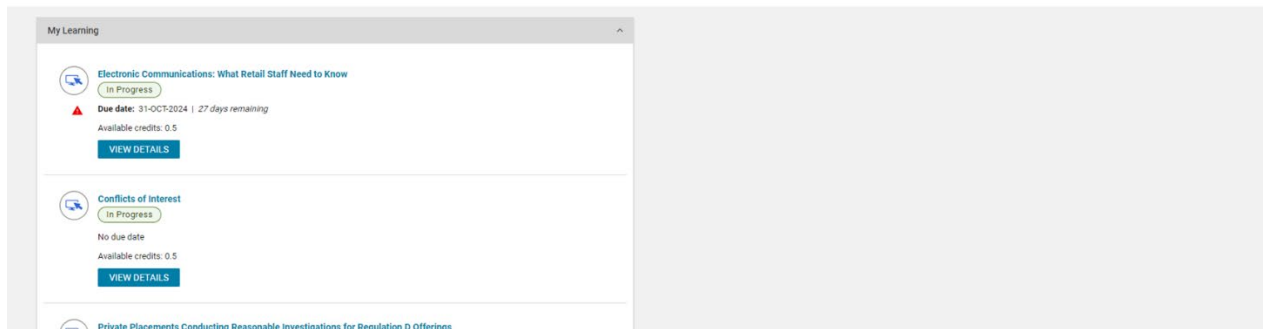
Once users have logged into their FinPro account, they will be able to access assigned courses through a link in the Actions (Quick Links) section at the top right (see screen shot below).



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 send any additional course assignments using the same template or any course removal requests via email to flex@finra.org.