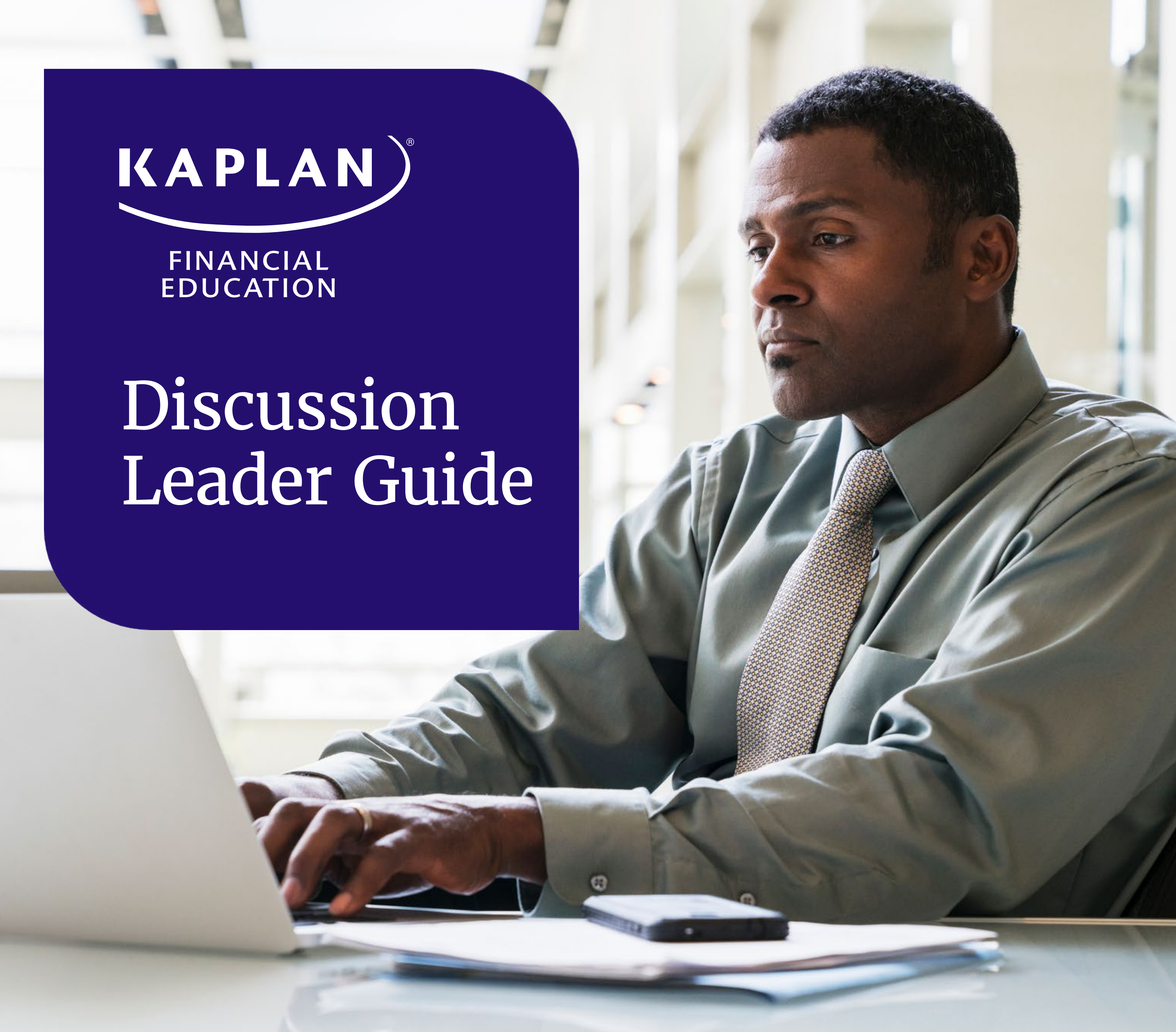


KAPLAN
FINANCIAL EDUCATION

Discussion Leader Guide

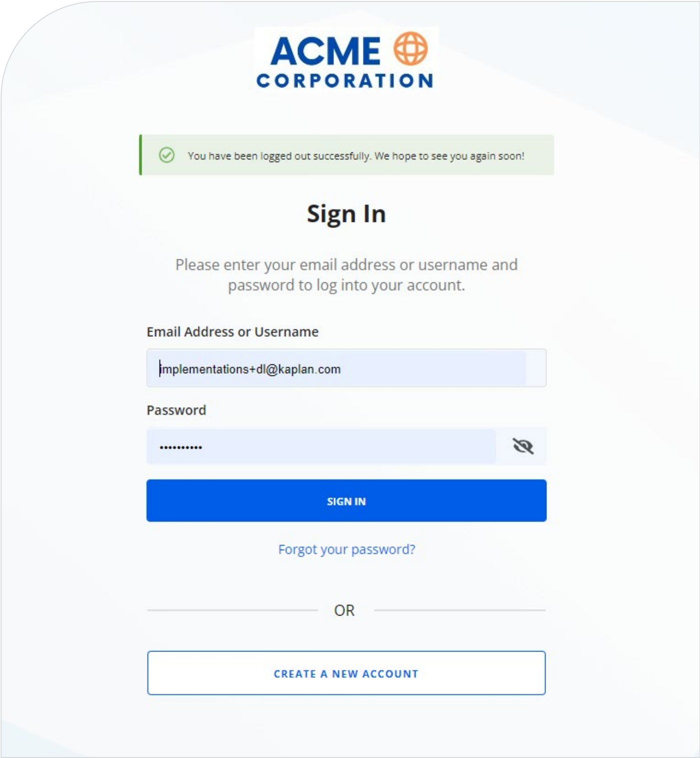
Accessing Your Portal

The pre-login welcome page is the main landing page of your portal. Your company logo can be added, and the portal's color scheme can be adjusted to match.

Next »

Portal Sign in

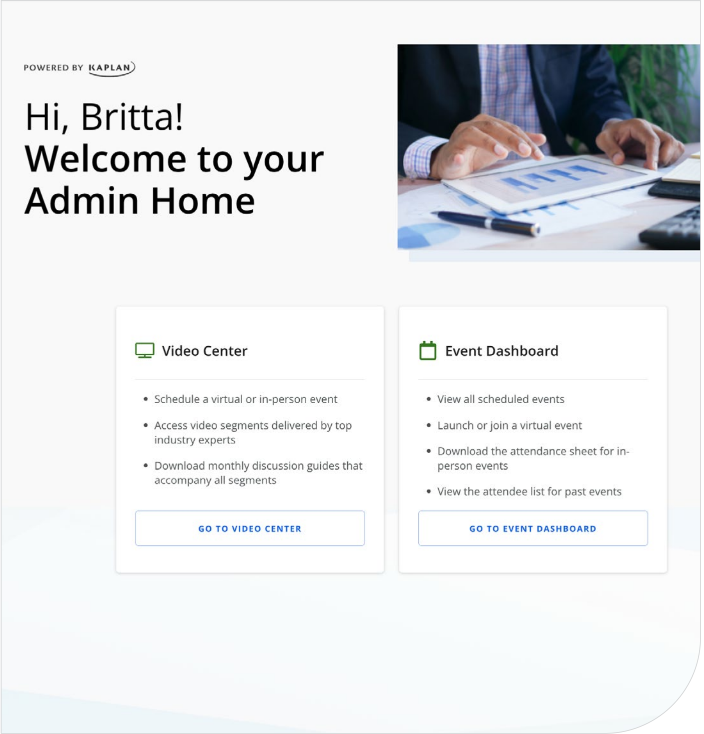
Sign into your portal with your email address and the password associated with your admin account. If you do not have credentials, please contact your Customer Engagement Manager to create an admin account.



Admin Home

After signing in, you will see the Admin Home dashboard, where you can access Group Study tools:

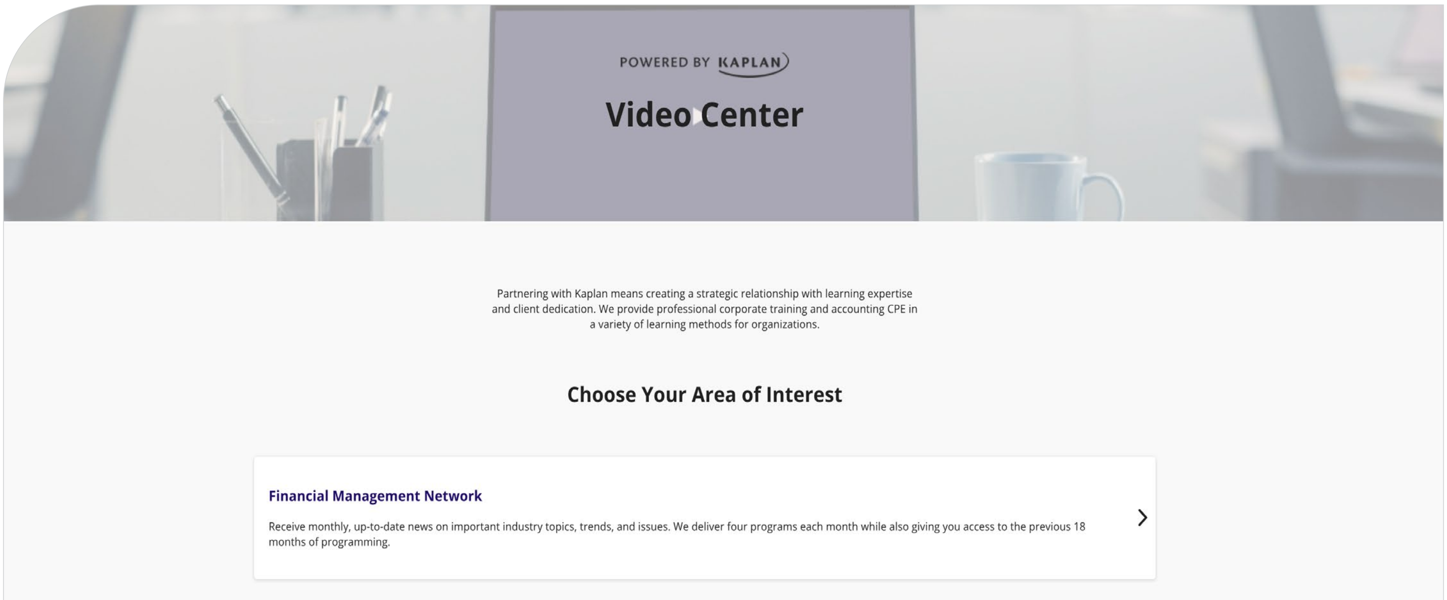
- **Video Center** will allow you to schedule an event, access video segments, and download the Subscriber Guides.
- **Event Dashboard** will allow you to view upcoming events, launch an event, and view past event information.



Video Center

The Video Center is used to schedule an event, access video segments, and download the Subscriber Guides. To access, click **Go to Video Center** in the Admin Home Dashboard.

The Video Center will display the product libraries you have subscribed to. To view a library, **click on the product card**.

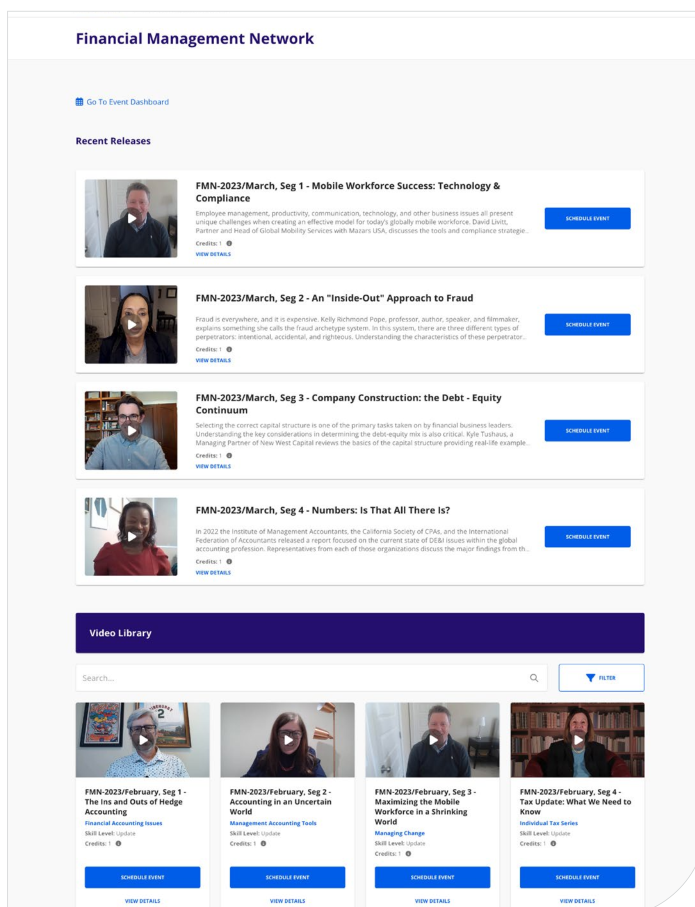


Video Library

Each video library will display the 4 most recently released video segments for the current month at the top of the page.

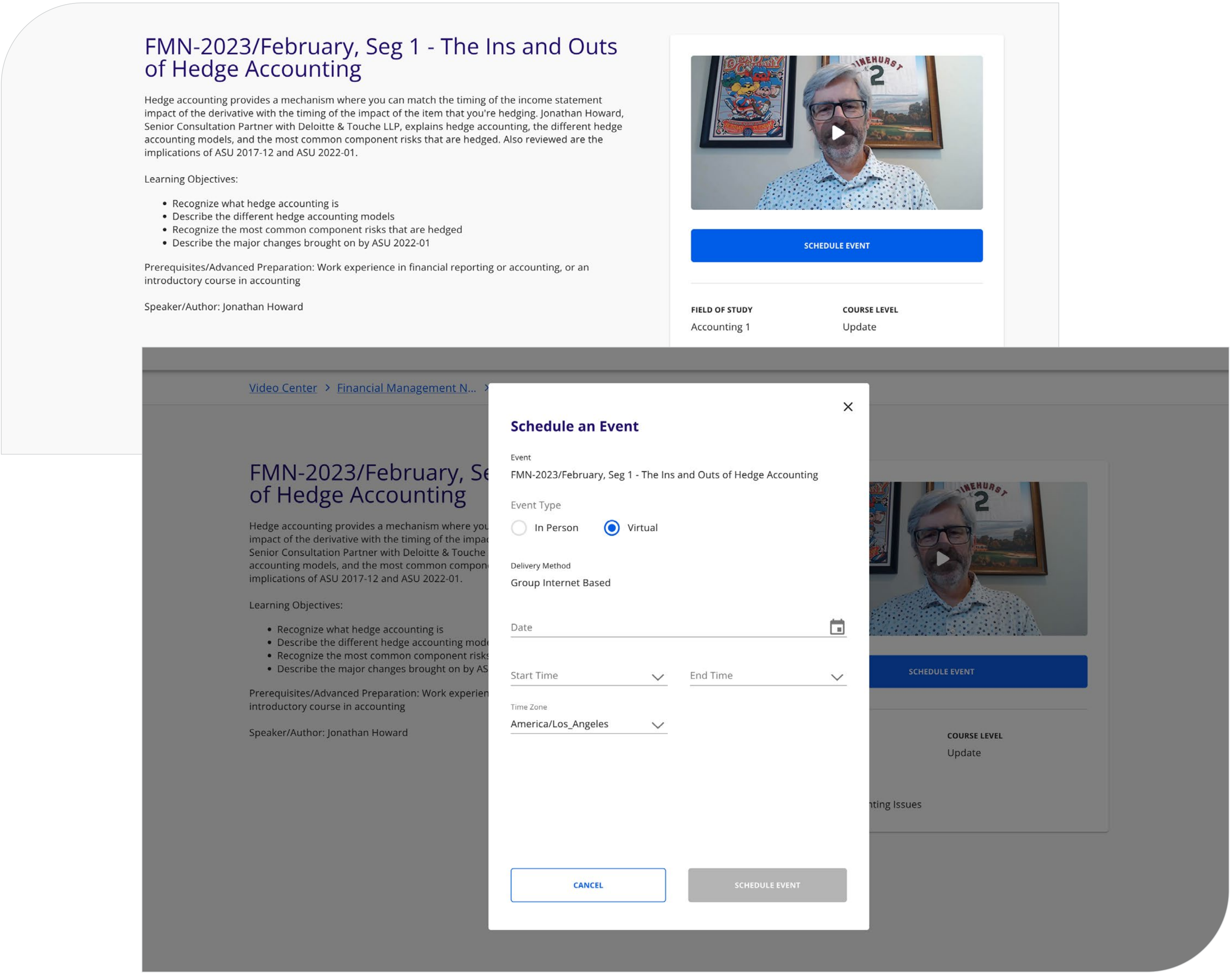
To watch a video segment, click on the **play icon** atop the image. The video will open in a new window. To see more details for a video segment, click **view details**. You will then see the full video description, learning objectives, prerequisites, and field of study. The remaining video segments can be accessed within the library by scrolling down the page. Search or filter criteria can be used to search for specific topics or videos. The bottom of the Video Library page provides access to the monthly Subscriber Guides and Monthly Summary Pages.

To download a Subscriber Guide, first, click the **download** button to view all available guides, then click to download any applicable file for the month.



Schedule an Event

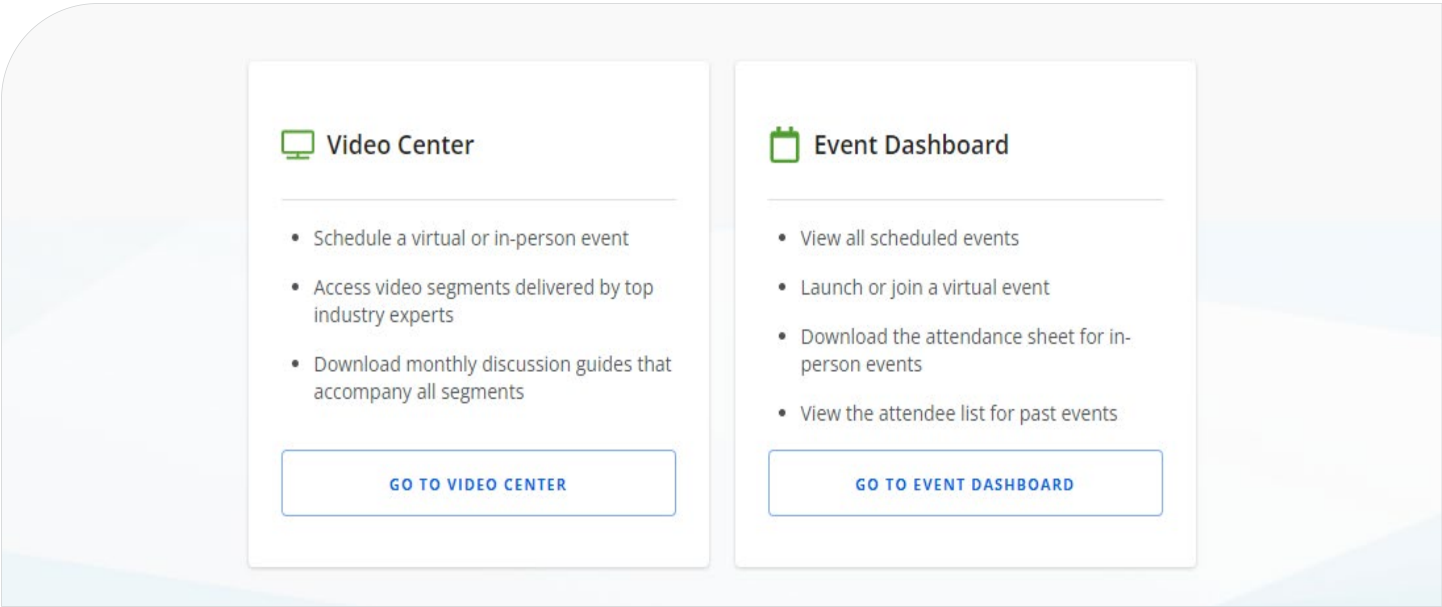
1. To begin scheduling an event, click **Schedule Event** from either the product description page or the Video Library page.
2. In the pop-up window, complete all required fields for the event type you will be leading—whether it will be In Person or Virtual.
3. Verify the required information is correct, and click the **Schedule Event** button.
4. A confirmation message will display when the event is successfully scheduled and added to your Event Dashboard



Event Dashboard

The Event Dashboard allows you to view upcoming events, go to an event, and view past event information. To access the Event Dashboard, click **Go to Event Dashboard** in Admin Home.

The Event Dashboard will show scheduled events for both Virtual (Group Internet Based) or In Person (Group Live) delivery methods. Please navigate to the applicable section below.

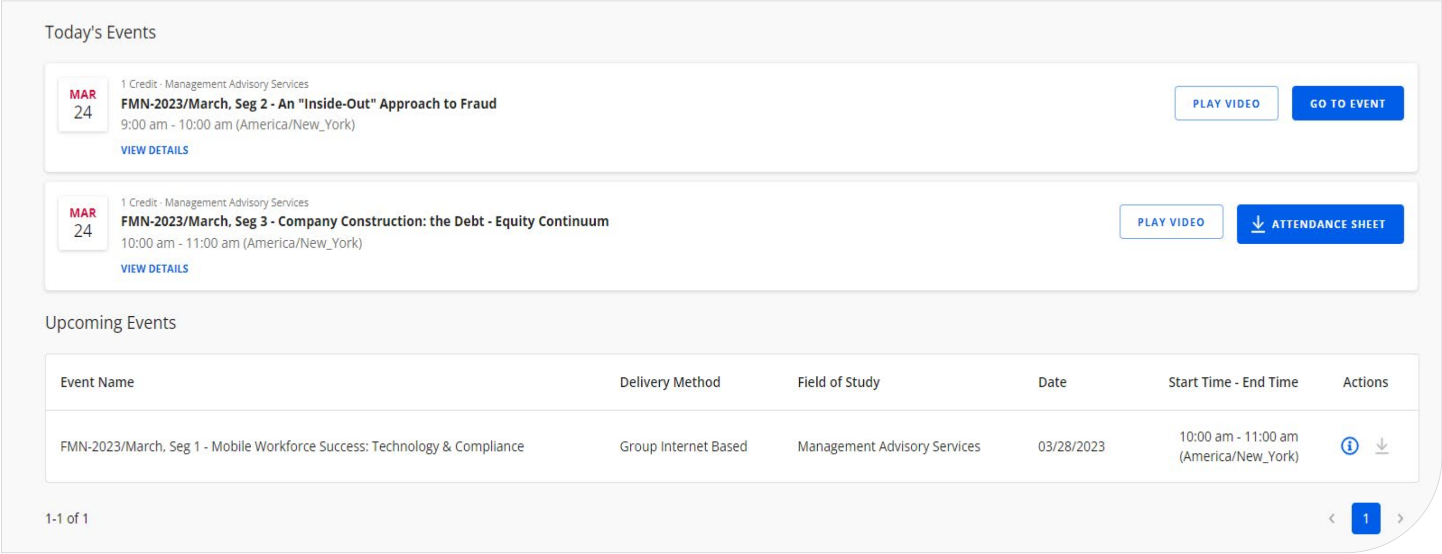


Leading Your Event

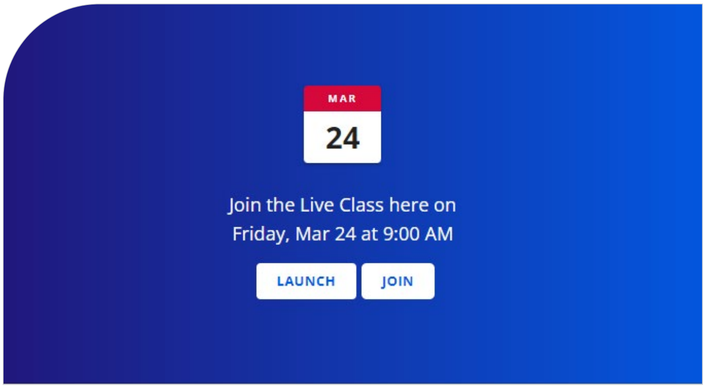
Virtual Events (Group Internet Based)

Start on your **Admin Home** dashboard. Go to the **Video Center** to download the Subscriber Guide, and launch the applicable **video segment** in a new window.

Next, go to the **Event Dashboard** and click **Go To Event** from the **Today's Events** section. This will open a new window with the Learning Management System for your virtual classroom.



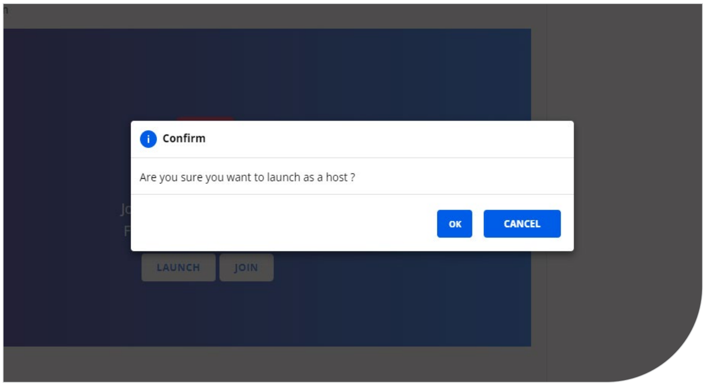
Virtual Events
(Group Internet Based)



To launch the event in the virtual classroom click on the **Launch button** to start the classroom.

Please note: The **Launch** button only displays for Discussion Leaders.

After clicking the **Launch** button, you will have to confirm that you would like to launch the event as the host.

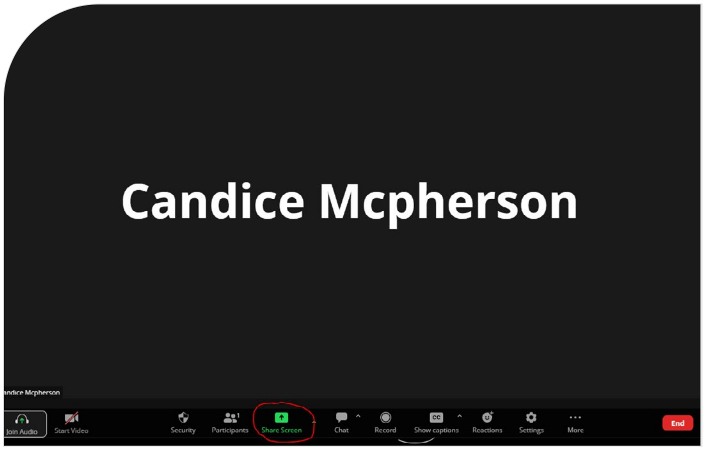


Once the event is launched, you will be brought into the **Virtual Classroom** as the **Discussion Leader**.

All participants will then automatically be brought into the room.

As the Discussion Leader, you will need to play the video for all participants so they can watch it.

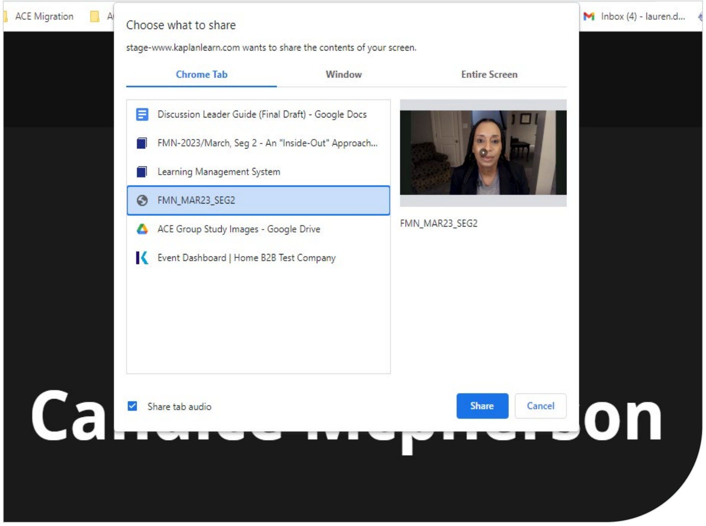
To do this, you must click on the **"Share Screen"** button on the Zoom ribbon.



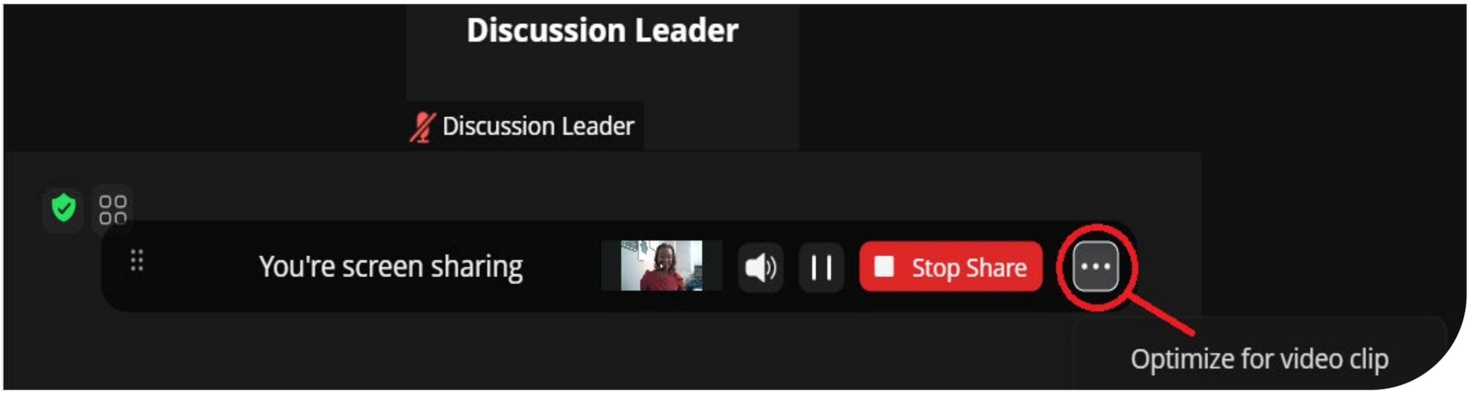
You will play the video that you retrieved from the **Video Center**.

It is recommended that you use multiple monitors to lead an event. Also, when sharing your screen, you want to ensure that you are choosing the tab that is playing the video.

If you choose to use one screen/monitor, when clicking on **Share Screen**, click on the Chrome tab and choose the tab that the video is being played on. If you minimize the Brightcove tab, even all the way off the screen to the toolbar, it will still show as being presented.



For the best video experience, we recommend that you optimize the video. To do so, after sharing your tab that contains the video, go back to the meeting room, and on the screen sharing ribbon, click the ellipsis. Choose **"Optimize for video clip."**



Please note: If you switch the tabs on the screen that is being shared while the video is playing, the participants will see your current screen rather than the video that should be playing for them.

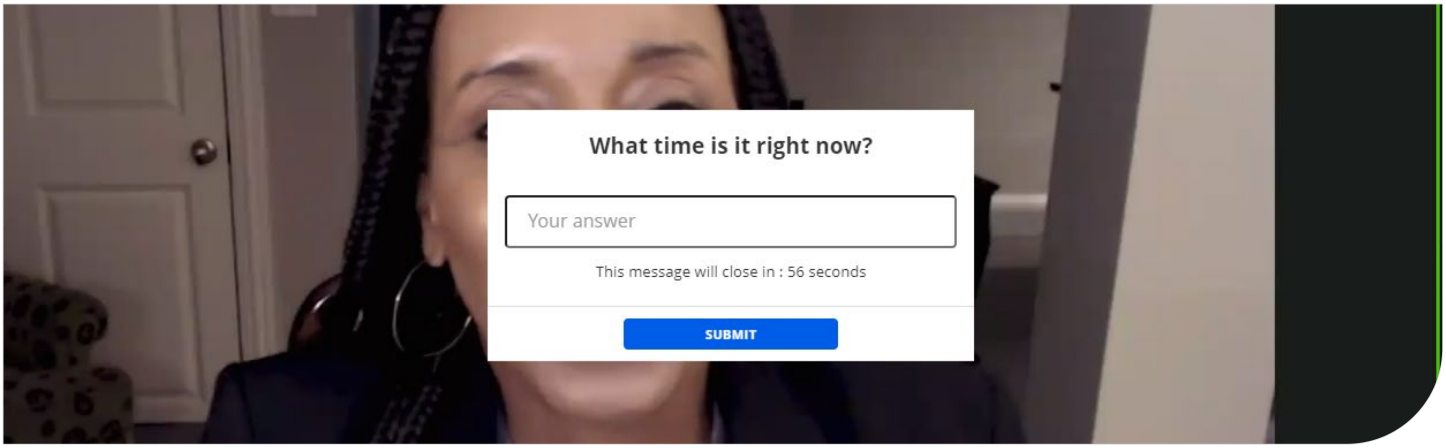
Leading the Discussion

Reminder: Use the corresponding Subscriber guide at the bottom of the **Video Library** page to facilitate the group discussion.

For Virtual Events:

Once the video has been played, you should stop screen sharing and enable the discussion with the participants. Ensure all participants have enabled their cameras and microphones to have a group discussion.

Throughout the entire event, participants will receive pop-up polling questions to monitor engagement. As the Discussion Leader, you will not have polling questions. It's important to remind participants at the start of the event that they will be receiving **4** polling questions throughout the event. They will have to answer **3 of the 4 questions** in order to receive credit for the event.



Once the group has watched the video, completed the group discussion, and each participant has actively participated for a minimum of 50 minutes, you can end the session, which will return you to the Learning Management System.

Certificates will be automatically generated if the participant has met the time and activity requirements.

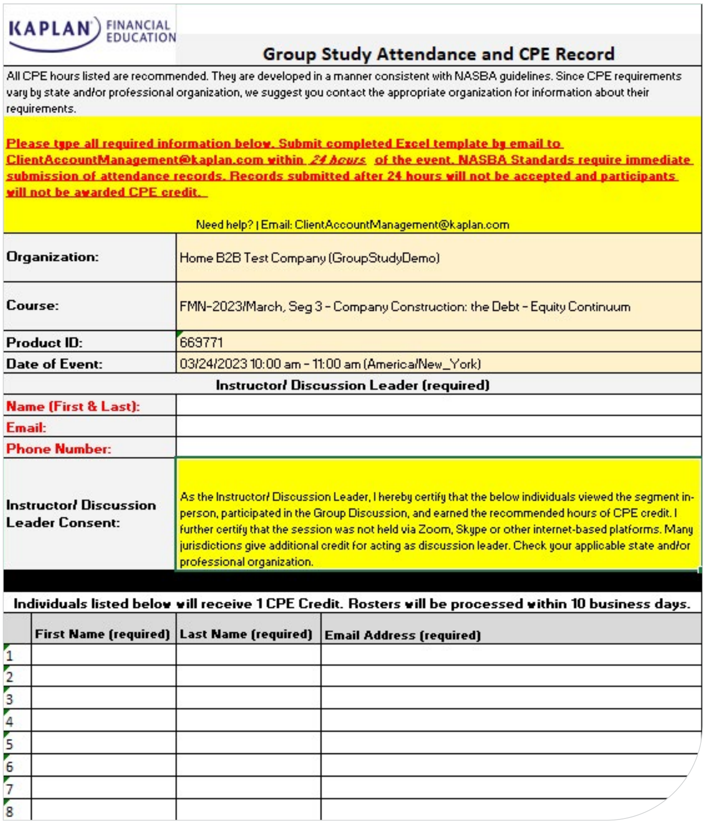
For In-person Events:

As a Discussion Leader, you will need to submit the Attendance Sheet that was developed for the session to our Regulatory team at fmngroupforms@smartpros.com to create the certificates.

In-Person Live Events

On the day of your event, you will need to download the **Attendance Sheet**, which is located in the event that is scheduled for today.

The attendance sheet is unique to each event and will include the specific product that was generated at the time the event was created. You will need to type in all of the required information as well as the participants' information. Once the form is completed, you will need to submit it to our Regulatory team at fmngroupforms@smartpros.com (this email is also listed in the attendance sheet).



KAPLAN FINANCIAL EDUCATION

Group Study Attendance and CPE Record

All CPE hours listed are recommended. They are developed in a manner consistent with NASBA guidelines. Since CPE requirements vary by state and/or professional organization, we suggest you contact the appropriate organization for information about their requirements.

Please type all required information below. Submit completed Excel template by email to ClientAccountManagement@kaplan.com within *24 hours* of the event. NASBA Standards require immediate submission of attendance records. Records submitted after 24 hours will not be accepted and participants will not be awarded CPE credit.

Need help? | Email: ClientAccountManagement@kaplan.com

Organization:	Home B2B Test Company (GroupStudyDemo)
Course:	FMN-2023/March, Seg 3 - Company Construction: the Debt - Equity Continuum
Product ID:	669771
Date of Event:	03/24/2023 10:00 am - 11:00 am (America/New_York)
Instructor/ Discussion Leader (required)	
Name (First & Last):	
Email:	
Phone Number:	
Instructor/ Discussion Leader Consent:	As the Instructor/ Discussion Leader, I hereby certify that the below individuals viewed the segment in-person, participated in the Group Discussion, and earned the recommended hours of CPE credit. I further certify that the session was not held via Zoom, Skype or other internet-based platforms. Many jurisdictions give additional credit for acting as discussion leader. Check your applicable state and/or professional organization.

Individuals listed below will receive 1 CPE Credit. Rosters will be processed within 10 business days.

	First Name (required)	Last Name (required)	Email Address (required)
1			
2			
3			
4			
5			
6			
7			
8			

Appendix

Becoming a Discussion Leader

In order to qualify as a Discussion Leader, the candidate must meet the definition of a subject matter expert—one who has the expertise in a particular area or topic where their expertise could be demonstrated through practical experience, education, or both. This person must be able to lead the group discussion and answer questions from the participants on the topic being presented and discussed.

A Discussion Leader Application must be submitted to and approved by the Regulatory Reporting group at Kaplan prior to scheduling an event. The candidate will serve as the Discussion Leader for the event once their application has been approved. The candidate will also receive the unique portal link associated with the admin account allowing them the ability to schedule events.

NASBA Requirements for Group Events

- Must include one element of engagement related to the course materials. Examples include:
    - Group discussion
    - Instructor-posed questions with time for participant reflection
    - Use of case study
- Must have a real-time Instructor present while the program is being presented
- Participants must be able to interact with the Instructor while the course is in progress

Important System Requirements

The use of mobile phones and tablets will invalidate your CPE credit. These devices do not work with our presence manager software, which is required by NASBA to validate your participation. If your device or browser choice prevents our presence manager from operating effectively, we cannot provide CPE credit. All browsers must have a pop-up blocker turned off, and Chrome is the recommended browser.

Preparing for Your Event

1. Make sure you have an account with "Discussion Leader" access. You can check this access by logging into Admin Home and verifying you have access to both the Video Center and Event Dashboard.
    a. If you do not, refer to the Appendix to learn how to become a Discussion Leader.
2. Ensure you can access the video at the time of the event. For virtual events, you should make it available in a separate tab to share at the time the event is held. (Refer to the Access Video and the Playing the Video sections above for more detail.)
3. Review the video segment along with the discussion questions to familiarize yourself with the topic to be discussed.
4. Recommended: Conduct a test run.
5. As an approved Discussion Leader, you must do the following for your event:
    a. Be present to lead the event in its entirety, launch the event, play the video for participants, lead the discussion following the video presentation, and answer any questions presented by attendees.
    b. Verify attendance before beginning the video.
        i. If the event will be held virtually, make sure all attendees have access to the virtual events.
    c. Be familiar with NASBA requirements for Group Events (see Appendix for an overview).