Welcome to the Canadian Securities Institute. Your partner in growing your Financial Services career.

Now, I know that there’s probably a ton of things you’d rather be doing than reading through this orientation video. But if I could ask you to just hang in there for a few minutes, I’ll give you all the information you need to make the absolute most of your learning experience with CSI.

The first thing I’m going to ask you to do is to make sure you read and fully understand CSI’s policies. In the top navigation bar on CSI.ca please rollover SUPPORT & EXAMS and then click on POLICIES.

In this section you will bask in the warm glow of legal jargon and disclaimers. In all seriousness though, the last thing CSI wants, is to have you jeopardize your career because you didn’t know something you should have. So please make sure you spend some time in the policies section.

You’ve given CSI your hard earned money for a reason, so let’s cut straight to Courses. Navigate to the course you are enrolled in via the top navigation bar by rolling over either THE CSI & IFC or OUR COURSES tabs. Once you select your course from the list you will find an abundance of information about the course you’ve enrolled in. You can also navigate to your course by simply typing the course name or ever so handy acronym in our omnipresent search bar at the top right of our webpage.

By clicking on the FULL COURSE INFORMATION PACKAGE button on the right-hand side, you will find all of the important information on the exams you’re so very looking forward to, including: exam weightings, exam length, question format, and most importantly, how many shots you have at getting the exam right.

Now, there may come a time when you need a little bit of help during your course, but how do you put your hand up when you’re not in a classroom? The financial gurus behind the e-mail address learning_support@csi.ca are an incredibly busy group, so be prepared to wait 1 or 2 business days for a reply. For additional support, some courses even have online discussion boards and FAQs.
When you first registered with CSI, you were sent an email with your Student ID number. I understand that no one likes to be known as a number, because quite frankly, it’s just plain impersonal. The only time your student ID digits become uber important is when it is time to write your exam. So throw the number in your cell, call it something clever like “CSI Student ID number”, and you’re good to go.

Let’s log into your account by clicking on the STUDENT LOGIN button at the top of our webpage. You can log in with either your Student ID, or your email address, and the password you created.

We’re in.

The MY COURSES tab in the main window lists all the courses you have currently enrolled in. You will also be notified here, if there have been any updates to the course material so make sure you scroll down to check for any messages under IMPORTANT COURSE UPDATES.

As you know, things change fast in this industry, so it is possible that your course materials and/or your exam may see some updates while you are enrolled.

Let’s look at your profile. The MY PROFILE tab has all your registration information including that oh so very important CSI Student ID Number. Be sure to keep your profile up to date. CSI needs your current mailing address to send you your course textbooks and course certificate. They’ll also need your current e-mail address as this is how CSI will stay in contact with you. They might flood your inbox with special offers too.

In the MY RECEIPTS tab, you can view and print all your sales receipts as well as find those ever so important tax receipts. Get them here, CSI can’t give them to you over the phone. Tax receipts for the year you are enrolled will be available in February of the following year.

At the MY MESSAGES tab you will find critical e-mails from CSI such as course enrollment confirmation and exam booking details.

Now if we move to the right a bit you will notice the handy little sidebar labeled MY CSI MENU. This menu provides quick links to the most commonly used features. Here you can book an exam, access exam results, download your transcripts, you can even extend your course!
ACCESSING YOUR ONLINE COURSE

Most of CSI’s courses offer some pretty cool on-line features, so be sure to check out what is available for your course. At the top of the MY CSI MENU, you will see a link labeled ACCESS ONLINE COURSES.

When you click this link for the first time, one of two things might happen.

A: the on-line learning program loads perfectly in your internet browser and you’re off on your educational path.

B: A couple of dialog boxes may pop up saying you need to allow popups or update your browser software. Your browser should help you easily make these tweaks and get you on your way. If it is not easily resolved, please head over to www.webct.com/tuneup for easy assistance. In just a few minutes you’ll be configured and good to go. And you thought IT folks held some divine secret.

ACCESSING YOUR ONLINE COURSE

You can easily book your exam online at any time during your course. Exam seats fill up quickly, so booking your exam in advance will allow you to secure a time and place that is convenient for you.

Simply click on the BOOK EXAM link in your MY COURSES tab or click the BOOK/RESCHEDULE/CANCEL EXAM link in the MY CSI MENU. Choose your selected course, and follow the steps online to find and book an exam sitting near you.

For most courses, you must take your exam in person at a supervised exam location. CSI provides 300 exam sittings per month in 65 centres across Canada as well as 10 exotic International locations. You can find the location closest to you via the dropdown menu when you book your exam. Some exams may also be offered online so keep your eye out for that option when booking.

CSI also offers supervised Computer Based Testing (CBT) for some of the courses at some centres. So trade in your number 2 pencil for a mouse and complete your exam on a computer. We’re well into the 21st century now. With CBT you’ll get an instant pass/fail answer (but not the test results) as soon as you complete your exam.

Detailed results for both CBT and paper based exams are available within 21 days after the completion of your exam. Check back often though, as CSI tends to deliver well in advance of this timeframe.
After logging in, you can easily find all of this information via the DOWNLOAD TRANSCRIPTS/STUDENT PERFORMANCE RECORDS link in the MY CSI MENU.

Your STUDENT PERFORMANCE RECORD lets you know how well you did.

Your NOTICE OF COURSE COMPLETION is what everyone will be asking you for, so make sure you know where this one is. You can find the link to download it in the MY CSI MENU as well.

Here’s a quick exam checklist to make sure you’ve got everything you need when you get there.

✓ Make sure you have thoroughly read this handy ALL ABOUT EXAMS document. You can find this on CSI’s homepage under the SUPPORT AND EXAMS menu in the TOP NAVIGATION BAR. The name says it all.

✓ Be sure you’re familiar with the exam weightings and format. You can find this information by clicking on the FULL COURSE INFORMATION button on the COURSE PAGE.

✓ Be sure you have received and addressed any course updates which may have occurred. As noted, these are accessible via the MY CSI MENU.

✓ Have your CSI Student ID number with you, if you listened to me it should be in your cell phone already, in which case don’t forget your cell. If you need to find your number again go to the MY PROFILE tab on your MY CSI PAGE.

✓ Finally make sure you review your exam confirmation email carefully, it contains important information about your exam. If you’ve lost this e-mail, not to worry, you can find a copy of this email easily in your MY MESSAGES tab on your MY CSI PAGE.

Well, there you have it. With a little effort, you will soon have another prestigious certificate to hang on your wall with pride. Would you like a frame with that? CSI offers frames custom fit for your certificate. Have a look at your options at checkout.

Thank you very much for choosing CSI as your partner in realizing your financial education goals.

Your journey to a rewarding career in financial services begins here!