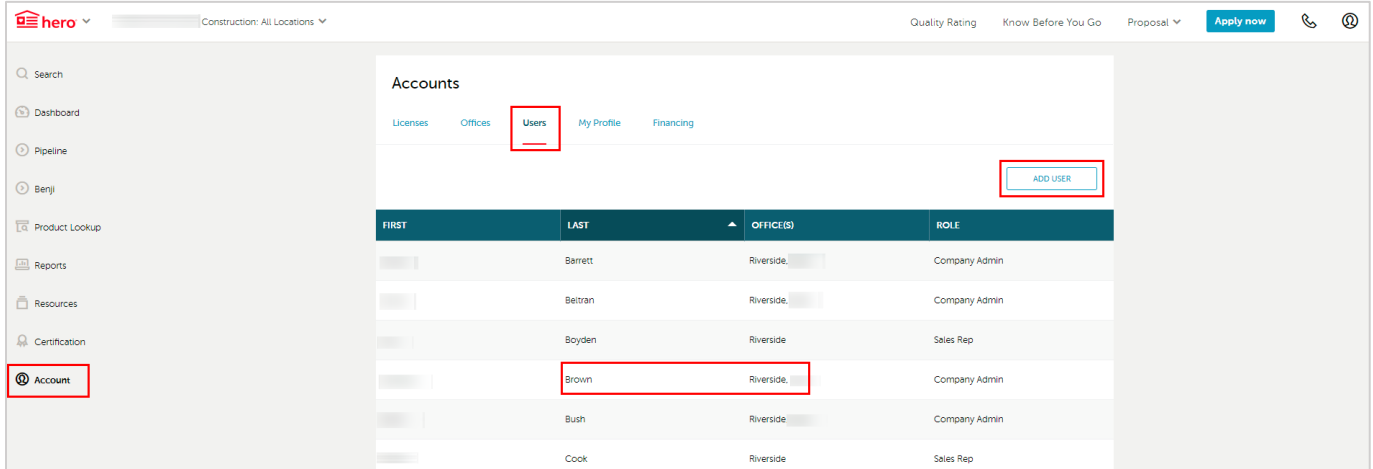


Updating CSLB Qualifiers

Updating qualifying users only takes a few minutes. Click “NEXT” in the banner and follow the 3 easy steps to ADD or UPDATE your qualifier. If they haven’t already, be sure to have your license holder log into HERO Pro and complete ID verification to activate their account.

Step 1: Add or Update a User

1. Within HERO Pro, click “Fix it Now” in the banner to access the Account tab. You can also navigate there by selecting “Account” and then “Users.”
2. HERO checks CSLB records to be sure an exact qualifier match is listed as an Admin on your account.
 - If your license holder does not have a HERO Pro account, select “Add User.”
 - If your license holder has a HERO Pro account, select their name to update their record.



Step 2: Select Qualifier

1. Select “Company Admin” from the role dropdown menu.

The screenshot shows the 'Personal Information' form. It has fields for first name (Brian), last name (D), email (_lcuser4014@renovateamerica.com), and phone number ((000) 222-1111). There are also dropdown menus for role (Company Admin) and a checkbox for 'Select from Qualifiers on your CSLB License'. The role dropdown is highlighted with a red circle 1, the checkbox is highlighted with a red circle 2, and the name dropdown (Brian) is highlighted with a red circle 3. A 'SAVE' button is highlighted with a red circle 4.

2. Check the box to “Select from Qualifiers on your CSLB License” to display your current license holders.
3. Select the name in dropdown you are designating. The form will then be auto-populated with the user’s CSLB information.
 - a. HERO will match the CSLB, so these fields are not editable. If adding a user, fill in the phone and email to complete.
4. *Be sure to click SAVE when finished!*

Frequently Asked Questions

How do I know whether I need to Add or Update a User?

ADD a user if your CSLB license holder does not have a HERO Pro account.

UPDATE a user if your CSLB license holder has a HERO Pro account, but they are not recognized in the system due to a name mismatch (spelling, suffix, etc.) or they have a role other than a Company Admin, such as Company Manager or Sales Rep.

I'm having trouble. Can you help me?

Yes! Contact HERO at 855-437-6411 and we will help walk you through the process and answer any questions.

What/Who is a CSLB Qualifier?

License holders are known by the Contractors State License Board (CSLB) as a "Qualifying Individual" or a "Qualifier" for short. Every CSLB license issued requires a Qualifying Individual (Qualifier) to be designated. The Qualifier is listed in the CSLB's personnel of record for the license as one of the following:

- Sole Owner
- Qualifying Partner
- Responsible Managing Employee (RME)
- Responsible Managing Officer (RMO)
- Responsible Managing Manager (RMG)
- Responsible Managing Member (RMM)

Why does this matter?

According to the CSLB, Qualifiers must exercise direct supervision and control of construction operations. HERO agrees with the CSLB, which is why the HERO Program requires the Qualifier (license holder) to be responsible for the company's HERO financed projects by maintaining an Admin account within the HERO Pro portal and being the signatory for the Renovate America Terms and Conditions, as long as such signatory is authorized to bind the contractor company.

What if we have an Office Administrator who takes care of our HERO paperwork?

We realize some Qualifiers may prefer to have other administrators handle the day-to-day tasks managed via HERO Pro. To accommodate this, the Qualifier may assign other individuals to also have Company Admin or Manager accounts, but remain responsible for all actions of their HERO Pro users.