



SBS FOR INDUSTRY • TRAINING GUIDE

ADD, UPDATE OR DELETE A LICENSEE EMAIL ADDRESS

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NAIC NATIONAL ASSOCIATION OF
INSURANCE COMMISSIONERS

The **License Manager** tool enables industry users to manage a licensee's information in one place, including the ability to update a licensee's email address.

→ STEP 1: LINK TO LICENSE MANAGER TOOL ON SBS WEBSITE HOME PAGE

Go to www.statebasedsystems.com. There are three ways to navigate to the License Manager tool.

The screenshot shows the SBS website home page. At the top, there is a navigation bar with links for Home, Software Services, About Us, News, Contact Us, and Help. The main header features the NAIC logo and the SBS logo (State Based Systems). Below the header is a large banner with the text "Hassle-free tools that make insurance compliance easy and reliable" and an image of two people looking at a tablet. To the right of the banner is a blue sidebar with a dropdown menu labeled "Select your jurisdiction:" and "Select One". Below the banner is a "LICENSING QUICK CENTER" section with two columns of icons: "SBS" (Lookup, Print License, Print Education Transcript, Report Generator) and "NIPR" (Apply for License, Renew License, Attachment Warehouse, Update Contact Information). To the right of the "NIPR" section is a "STATE SERVICES" section with a dropdown menu and the text "Select a jurisdiction to see a full list of its available services." Three green numbered callouts are overlaid on the page: 1 points to the jurisdiction dropdown, 2 points to the State Services dropdown, and 3 points to the "Update Contact Information" icon in the NIPR section.

1. Select Your Jurisdiction: In the top right, select your jurisdiction. From the options that appear select 'Update Email Address.'

2. State Services Launch Page: In the bottom right hand corner of the screen, select a jurisdiction from the 'State Services' drop down. Select 'Update Email Address' or Email Maintenance.'

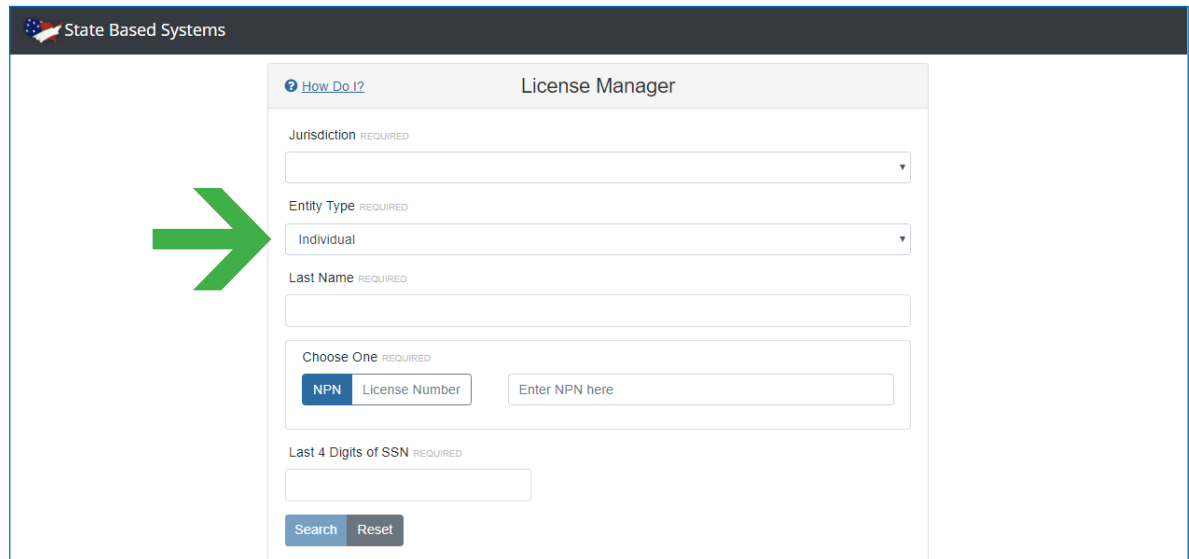
3. Update Contact Information: Use NIPR.com Contact Change Request to update your contact information include physical addresses, email addresses and phone numbers.

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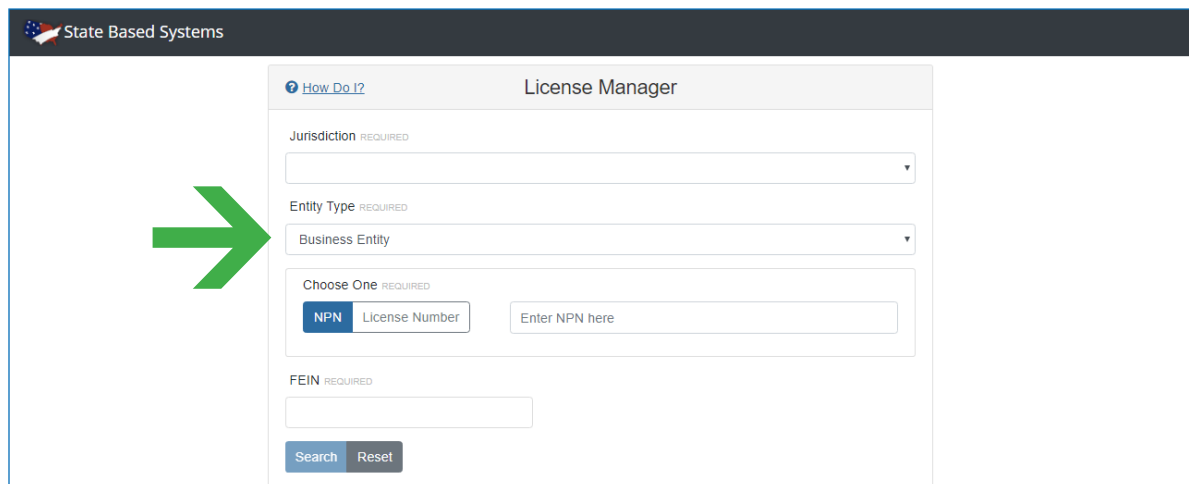
→ STEP 2: LICENSE MANAGER CRITERIA

Enter required criteria which varies based on your selected Entity Type.



The screenshot shows the "License Manager" form in the "State Based Systems" interface. A green arrow points to the "Entity Type" dropdown menu, which is set to "Individual". The form includes the following fields:

- Jurisdiction** (REQUIRED): A dropdown menu.
- Entity Type** (REQUIRED): A dropdown menu with "Individual" selected.
- Last Name** (REQUIRED): A text input field.
- Choose One** (REQUIRED): A section with two options: "NPN" (selected) and "License Number".
- Last 4 Digits of SSN** (REQUIRED): A text input field.
- Search** and **Reset** buttons.



The screenshot shows the "License Manager" form in the "State Based Systems" interface. A green arrow points to the "Entity Type" dropdown menu, which is set to "Business Entity". The form includes the following fields:

- Jurisdiction** (REQUIRED): A dropdown menu.
- Entity Type** (REQUIRED): A dropdown menu with "Business Entity" selected.
- Choose One** (REQUIRED): A section with two options: "NPN" (selected) and "License Number".
- FEIN** (REQUIRED): A text input field.
- Search** and **Reset** buttons.

➔ STEP 3: LICENSE MANAGER SUMMARY PAGE

The License Manager Summary Page displays information about the licensee categorized in sections and has quick access to the PDF license, email address update and education transcript information via the buttons on the toolbar. Use the 'License Type' dropdown to view the different license types, if applicable.

Click the 'Update Email Address' icon. A pop up window will appear.

State Based Systems - Arkansas | Print License | Update Email Address | Education Transcript | License Type: Insurance Producer

Licensee Demographics

Name: Ashley, Lauren C | NPN: 17187441 | Resident?: Yes
 Domicile State: Arkansas | Domicile Country: United States

Address

Business Address	Mailing Address
216 WARD ST	104 CAIN RD

To **add** an email, select an email type, enter a valid email address and select 'Add.'

To **update** an existing email, click the pencil icon. The email address will populate in the 'Email Address' field. Make edits and, when finished, click 'Update.'

To **delete** an email, click the trash can icon to the far right of the email address.

When finished making changes, select 'Close.'

Update Email Address

Email Type: [Dropdown]

Email Address: [Text Field]

Add

Type	E-mail		
Email	lauren.ashley@insuranceco.com		
Business Email	lauren.ashley@insuranceco.com		

Close

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