



SBS FOR ORGANIZATIONS • TRAINING GUIDE

COMPANY DEMOGRAPHIC AND/OR CONTACT INFORMATION

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➔ HOW DO I: CHANGE COMPANY DEMOGRAPHIC INFORMATION?

1 Navigate to the SBS for Organizations home page.

From your SBS for Organizations Home Page, click the Go To Dashboard button on the Company section header.

NAIC NATIONAL ASSOCIATION OF INSURANCE COMMISSIONERS

SBS for Organizations
State Based Systems

ABOUT HELP sbs1

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View Company Summary Save Searches for Dashboard Update Company Addresses and Contacts Notifications Company Summary Print User Settings

2 Company Matrix

The Company Matrix section will display companies in your account. Select the Company Name link of the company that is to be updated.

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SBS for Organizations
State Based Systems

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Company Matrix

Show 10 entries Filter: Export to Excel

	License State	SBS Company Number	Company Name	Domicile Type	Company Type	Company Status	NAIC CoCode	Renewal Date	Domicile State	Business Address
<input type="checkbox"/>	Demo		Alaska Test Company	Foreign	Health Maintenance Org.	Active	10000	06/30/2019	Alaska	Juneau, AK 99801
<input type="checkbox"/>	Demo	4000106316	Alaska Test Company	Foreign	Life	Active	10000	09/17/2019	Alaska	Juneau, AK 99801

3 Company Summary

The Company Summary page will display all current data about the selected company. Scroll down to Address and Phone, Email, Website section headers.

Demographics

Company Name: Alaska Test Company	NAIC CoCode: 10000	Short Name:
SBS Company Number: 3334445555	State of Domicile: Alaska	Country of Domicile: United States
Domicile Type: Foreign	Organization Type: Limited Liability	Date of Incorporation:
NAIC Group Code: -	Name Change Flag: No	Redomestication Flag: No
Merger Flag: No		
Company PIN: 6667778888		

Company Analysts
No results found.

DBA Name
No results found.

Address

Business Address	Mailing Address	Statutory Home Office Address	Main Administrative Office Address
9998 Road Juneau, AK 99801 United States	9998 Road Juneau, AK 99801 United States	8888 street Juneau, AK 99801 United States	8888 street Juneau, AK 99801 United States

Phone, Email, Website

Phone		Email		Website
Type	Number	Type	Email	No results found.
Business Primary Phone	111-000-0000	Business Email	alaska123.test@email.com	

4 Begin edit for Address.

Click on the edit (Pencil) under the section header for Address. Please note that only Business Address and Mailing Address can be edited. Statutory Home Office Address or Main Administrative Office Address cannot be edited. (The information on these two non-editable addresses is normally pulled from the annual financial statement.)

Address

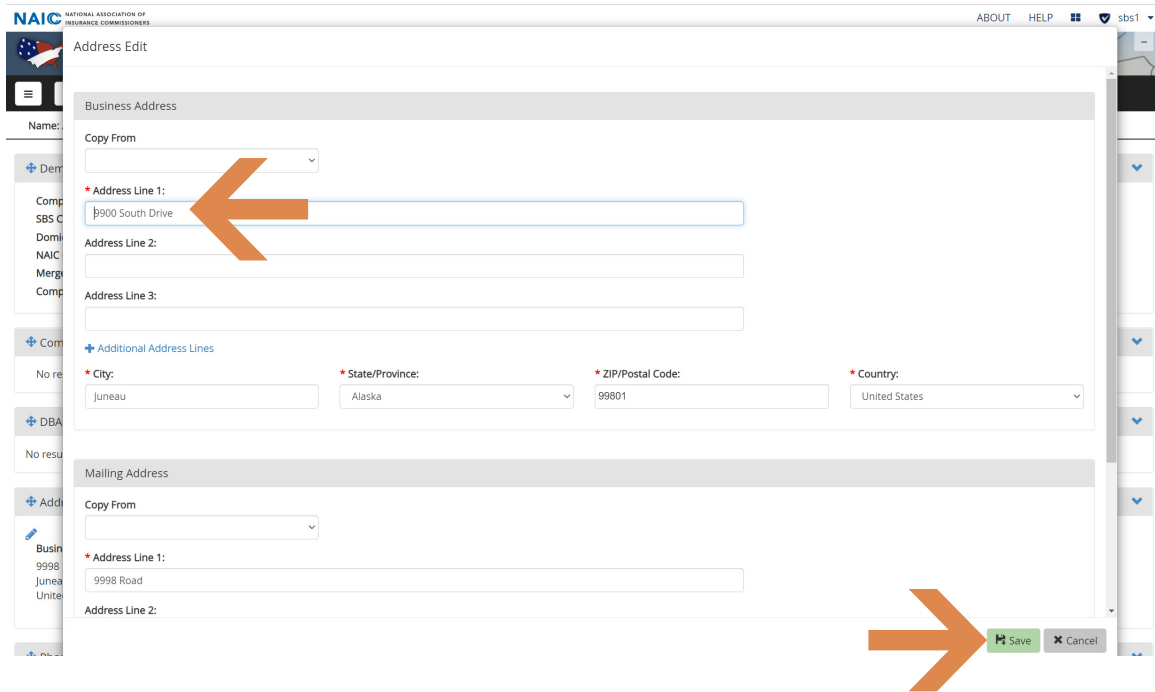
Business Address	Mailing Address	Statutory Home Office Address	Main Administrative Office Address
9998 Road Juneau, AK 99801 United States	9998 Road Juneau, AK 99801 United States	8888 street Juneau, AK 99801 United States	8888 street Juneau, AK 99801 United States

Phone, Email, Website

Phone		Email		Website
Type	Number	Type	Email	No results found.
Business Primary Phone	111-000-0000	Business Email	alaska123.test@email.com	

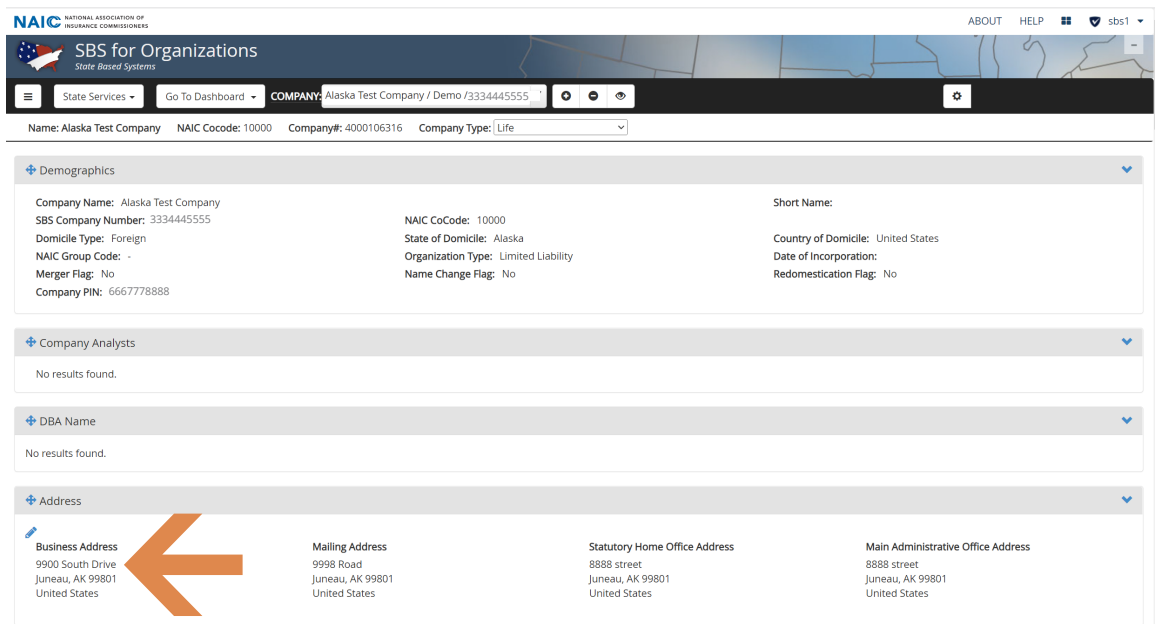
5 Create edit for Address.

The edit screen displays. Delete the current address as appropriate and enter all new address information for Business Address or Mailing Address. Select Save.



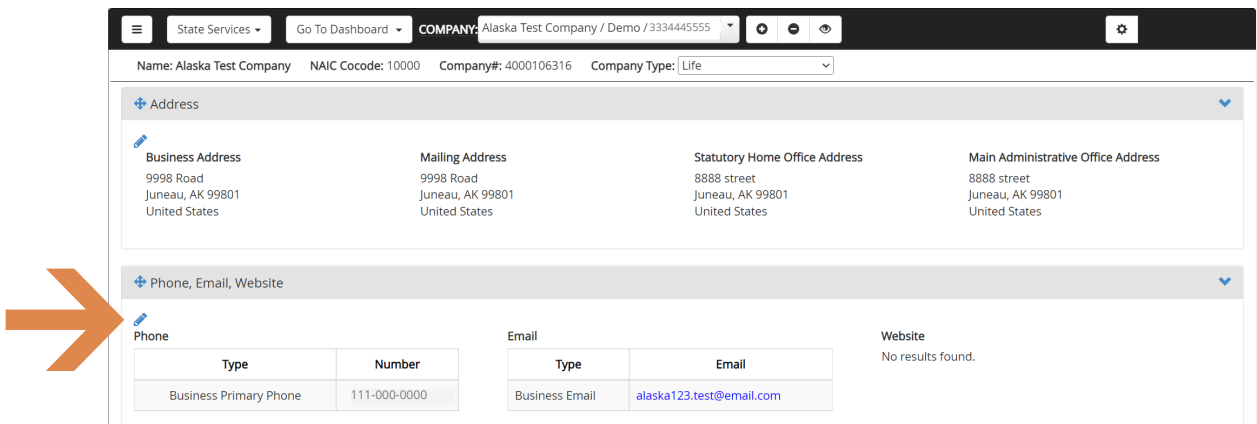
6 Updated Address information is displayed.

The new data is displayed in the appropriate field. In this example, the new Business Address Line 1 is displayed under the Address header and Business Address heading.



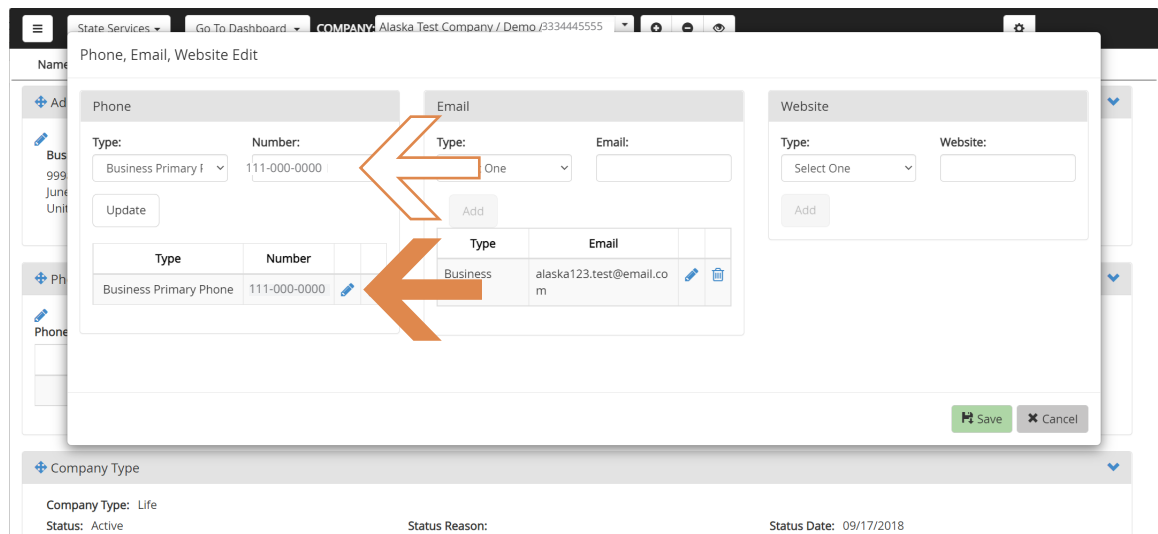
7 Begin edit for Phone, Email, Website.

Click on the edit (Pencil) under the section header for Address or Phone, Email, Website.



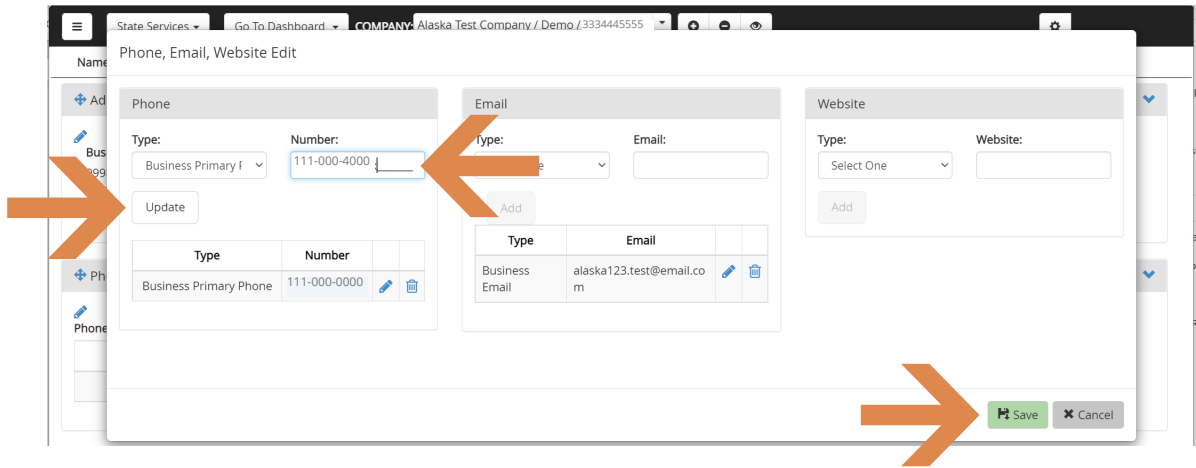
8 Edit current data for Phone, Email, Website.

The edit screen displays. Click on edit (Pencil). In this example, Business Primary Phone is selected, and the edit field above fills with current data.



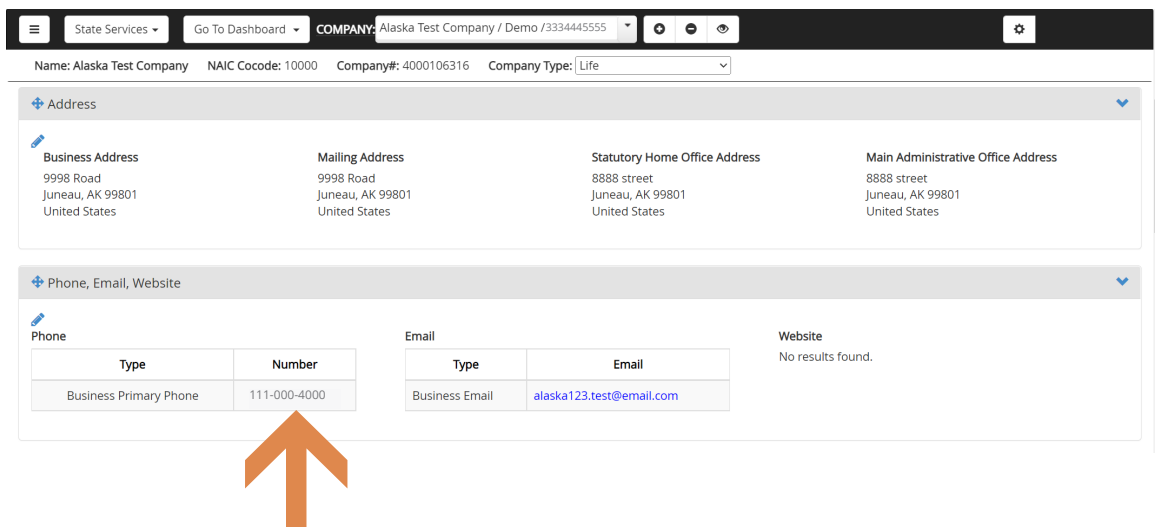
9 Enter updated Phone, Email or Website information.

Delete the current data and enter the new information in the appropriate field. Select Update and then select Save.



10 Updated Phone, Email or Website is displayed.

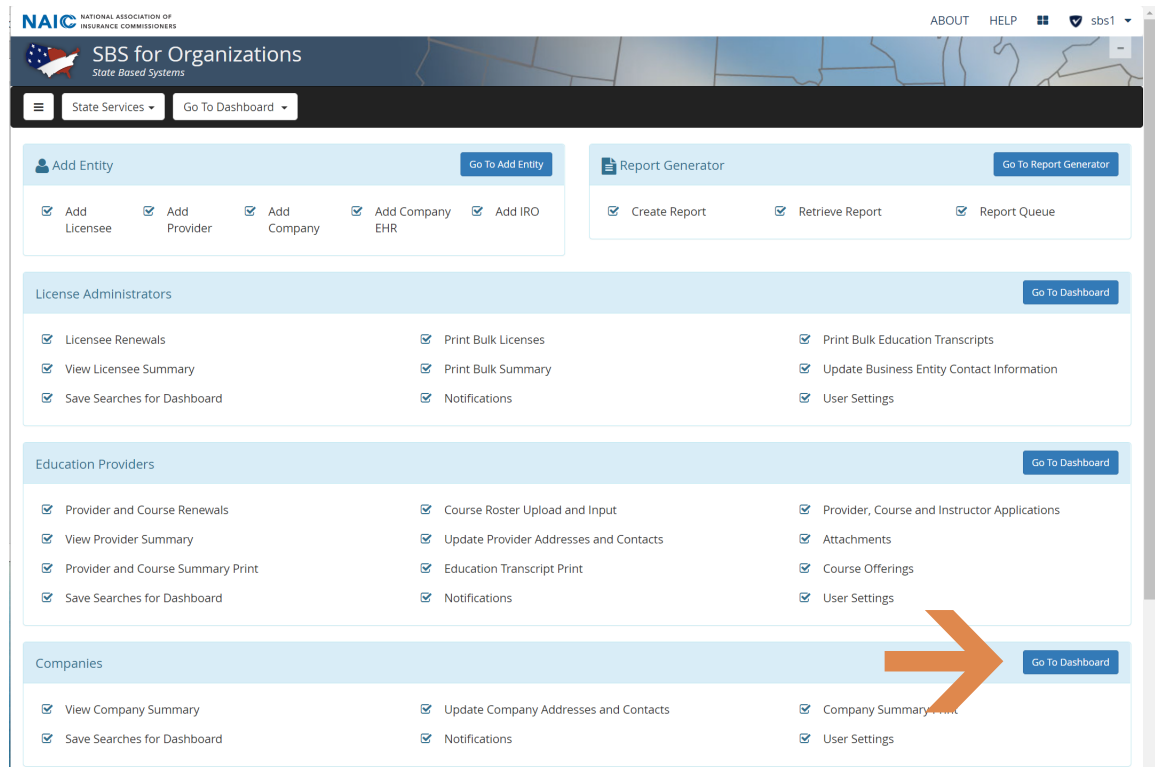
The new data is displayed in the appropriate field. In this example, the new phone number is displayed in the Phone, Email, Website section.



➔ HOW DO I: CHANGE COMPANY CONTACT INFORMATION?

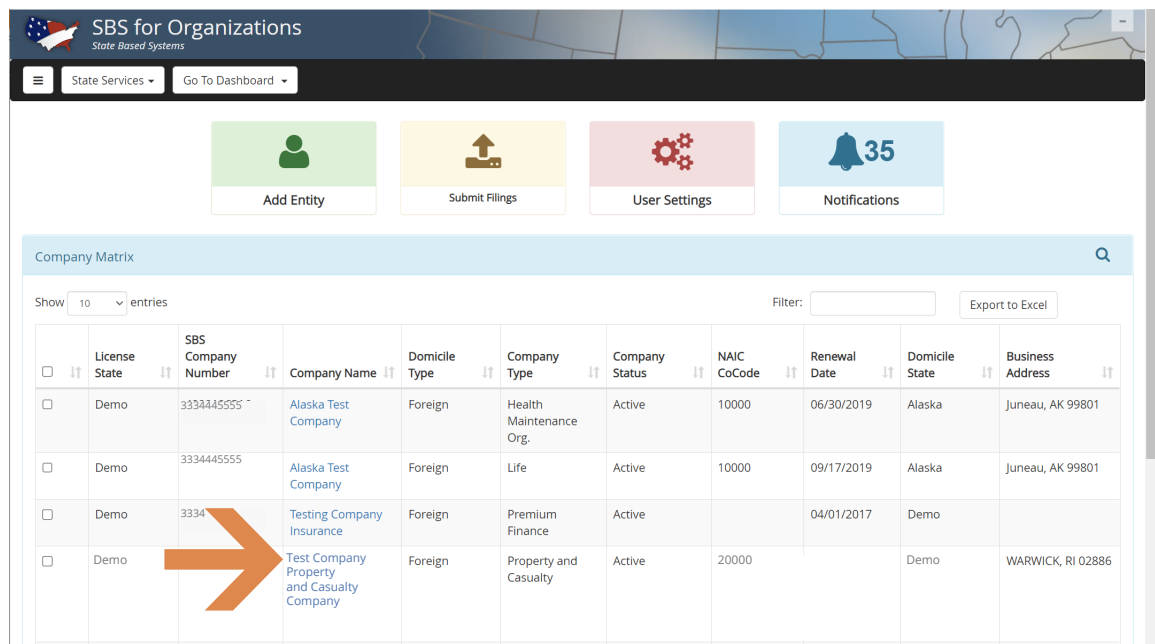
1 Navigate to the SBS for Organizations home page.

From your SBS for Organizations Home Page, click the Go To Dashboard button on the Company section header.



2 Company Matrix

The Company Matrix section will display companies in your account. Select the Company Name link of the company that is to be updated.



3 Company Summary - Edit existing Contact information.

The Company Summary page will display all current data about the selected company. Scroll down to the Contact section header and find the Company Contact that needs to be updated. Select the Edit (Pencil) to the far right of the row.

State Services | Go To Dashboard | COMPANY: TEST PROPERTY AND CASUALTY INSURANC CO./TEST/11222333

Name: FARMERS PROPERTY AND CASUALTY INSURANCE COMPANY NAIC Cocode: 26298 Company#: 154527488 Company Type: Property and Casualty

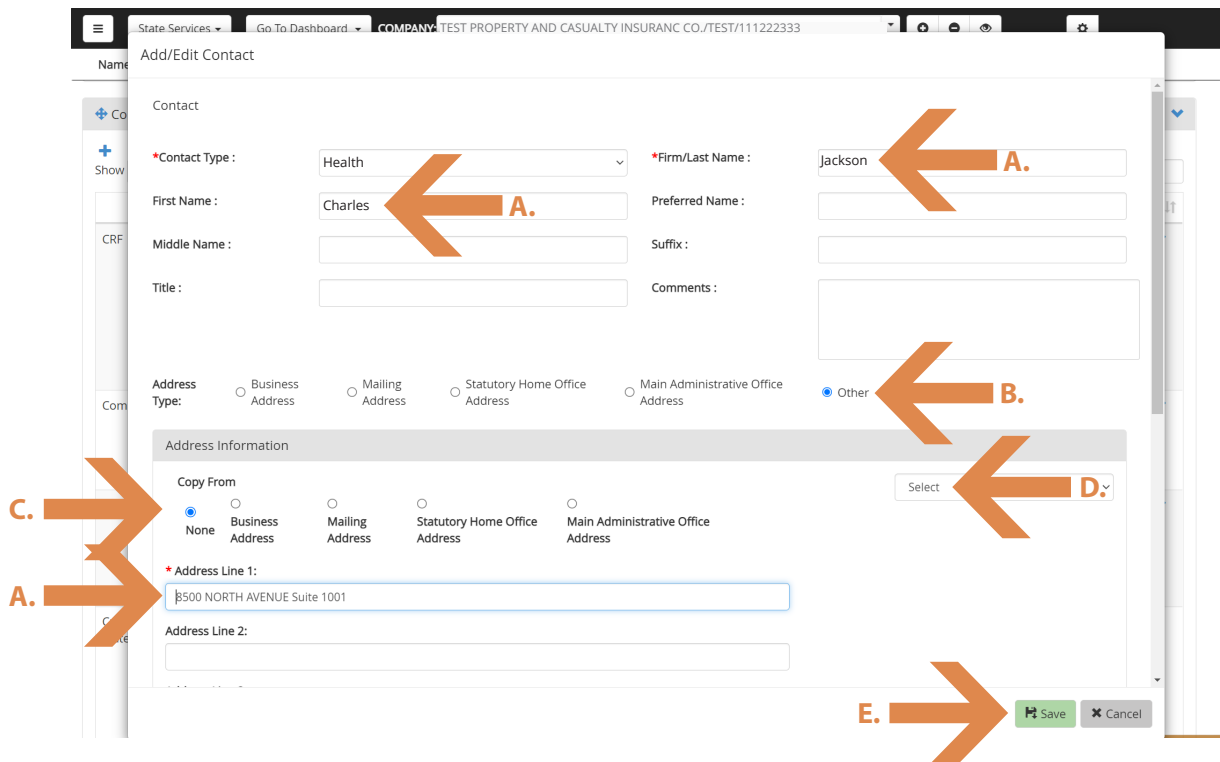
Filter: []

Contact Type	Preferred Name	Name	Email	Phone	Address	
CRF		ATTN: TAX DEPARTMENT AREA 3D	Business Email: test@email.com	Business Primary Phone: 816-555-4444	Other 6301 OWENSMO UTH AVE Suite 30 1 WOODLAND HIL LS, CA 91367-221 6 United States	
Compliance		Complaint/inquiry		Other Phone: 800-854-6011	Other N/A N/A, UN Unidenti fied	
Compliance		DEMO ALFRED GRAVES CONSUMER COMPLAINTS CONTACT	Email: AAG1212@demopropertycasualty.com	Other Phone: 111-112-2222	Other PO BOX 1212 GRAND RAPIDS MI 49505 UNITED STATES	
Current Financial Statement Contact		DEMO JON DOE CONSUMER COMPLAINTS CONTACT	Email: ddj2323@demodjpropertycas.com	Other Phone: 222-112-2222	Other PO BOX 34343 GRAND RAPIDS MI 49510 UNITED STATES,	

4 Edit Contact information.

The Add/Edit Contact field will appear. Update the Contact information as appropriate.

- A.** In this example, the First Name, Firm/Last Name and Address Line 1 are being edited.
- B.** For Address Type, Other must be selected or the system will copy from the selected Address Type.
- C.** Under Copy From, select None to add a new address without copying from another on the list provided. If one of the addresses listed in Copy From is appropriate, select that type of Address instead of None.
- D.** If you share an Address with another Contact Type, select that Contact Type under the Select pull down.
- E.** Select Save.



5 Display updated Contact information.

The updated Contact information is now visible on the Company Summary page.

Name: FARMERS PROPERTY AND CASUALTY INSURANCE COMPANY NAIC Code: 26298 Company#: 154527488 Company Type: Property and Casualty					
Market Conduct Contact and Address	DEMO ALFRED GRAVES CONSUMER COMPLAINTS CONTACT	Email: AAG1212@demopropertycasualty.com	Other Phone: 111-112-2222	CA 91367-2216 United States	Other PO BOX 1212 GRAND RAPIDS MI 49505 UNITED STATES
Premium Tax	DEMO JON DOE CONSUMER COMPLAINTS CONTACT	Email: ddj2323@demodjpropertycas.com	Other Phone: 222-112-2222		Other PO BOX 34343 GRAND RAPIDS MI 49510 UNITED STATES
Health	Charles Jackson	Business Email: test@email.com	Business Primary Phone: 816-555-4444		Other 8500 NORTH AVENUE Suite 1001 WOODLAND HILLS, CA 91367-2216 United States

6 Company Summary - Add new Contact.

The Company Summary page will display all current data about the selected company. Scroll down to the Contact section header and select the Plus sign.

The screenshot shows the 'Company Summary' page for 'Alaska Test Company'. The page is divided into several sections, each with a plus sign icon to expand it. The sections are:

- Demographics:** Displays company name, number, NAIC code, domicile type, state, group code, merger flag, PIN, short name, country of domicile, date of incorporation, and redomestication flag.
- Company Analysts:** Shows 'No results found.'
- DBA Name:** Shows 'No results found.'
- Address:** Lists Business, Mailing, Statutory Home Office, and Main Administrative Office addresses.
- Phone, Email, Website:** Contains a table for phone numbers and emails, and a field for the website.
- Company Type:** Shows company type, status, effective date, issue date, articles of incorporation, COA number, business activities, status reason, expiration date, approval date, article number, cyber security report, and received date.
- Line Of Business:** A table listing business lines, statutory citations, effective dates, and terminate LOB.
- Appointments:** Includes a 'Load Appointments' button.
- Contact:** This section is highlighted with a large orange arrow pointing to a plus sign icon, indicating where to click to add a new contact.
- Bond:** Shows 'No results found.'

7 Enter new Contact information.

The Add/Edit Contact field will appear.

- A.** Enter all new required Contact information and other information as appropriate.
- B.** Please see specifics under direction #4 Edit Contact information, B – D for each Address Type, Copy From, and Contact Type pull down.
- C.** Select Save.

The screenshot shows the 'Add/Edit Contact' form with several orange arrows pointing to specific elements:

- A.** Points to the ***Contact Type** dropdown (set to 'Life and Annuity') and the ***Firm/Last Name** text field (containing 'Jackson Insurance').
- B.** Points to the **Address Type** radio buttons (with 'Other' selected) and the **Copy From** dropdown menu.
- A.** Points to the ***Address Line 1** text field (containing '2501 South Road').
- A.** Points to the ***City** dropdown (set to 'Juneau'), ***State/Province** dropdown (set to 'Alaska'), ***ZIP/Postal Code** text field (containing '99812'), and ***Country** dropdown (set to 'United States').
- C.** Points to the **Save** button at the bottom right.

8 Display new Contact information.

The new Contact information is now visible on the Company Summary page.

Life and Annuity	Jackson Insurance			Other 1000 North Open Road Juneau, AK 99812 United States
Market Conduct Contact and Address	DEMO ALFRED GRAVES CONSUMER COMPLAINTS CONTACT	Email: AAG1212@demopropertycasualty.com	Other Phone: 111-112-2222	Other PO BOX 1212 GRAND RAPIDS MI 49505 UNITED STATES