OPTION 1: UPLOAD COURSE ROSTER FILE

For the first option login to SBS for Organizations and navigate to your home screen. It should look like the screenshot below.
 Click on the 'Course Roster' button.



3. The Upload Roster page will appear and you can upload a file using the format from the Text Sample Data File or Excel Sample Data File. These files give you the convenience of uploading numerous courses from multiple states at the same time.

4. Click on the 'Upload Roster File' button and find the file you want to upload.

≡	State Services -	Go To Dashboard 👻			
1 Atl	endees / 2 Review	/ 3 Payment Details			
L	pload Roster				
	Manual Input	Upload Roster File	Continuing Education	Pre-Licensing Education	
			Text Sample Data File (CE) Excel Sample Data File (CE)	Text Sample Data File (PLE) Excel Sample Data File (PLE)	

5. The Course Roster Details will appear and you can click on the 'Next' button.

endees / 2 Review / 3 Payment Det	ails										
load Roster											
Manual Input Upload Roster File			Continuing	Education		F	Pre-Licensing Education				
			Text Sampl	e Data File (CE)			Text Sample Data File (PLE)				
			Excer samp	ne Data File (CE)			Excer sample Data file (PEE)				
ourse Roster Details											
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ourse Roster Details	Þ							Filter:			
urse Roster Details 0 of 1 Selected 0 v 10 v entries elect Jurisdiction Provide 11 Number	er Course Name	Course Number	NPN 11	License Number	Licensee Name	Is Resident?	Date Taken	Filter:	Credits Earned	1 11	
urse Roster Details 0 of 1 Selected w 10 ventries sect Jurisdiction Image: Section of the	er er er 10 10 10 10 10 10 10 10 10 10 10 10 10	Course Number 1118866	NPN 11 19988551	License Number	Licensee Name	Is Resident?	Date Taken	Filter:	Credits Earned GEN-9	1 11	
urse Roster Details 0 of 1 Selected wing 1 to 1 of 1 entries	er er 11 Course Name 11 88866 Agricultural Insurance and Risk Management	Course Number 1118866	NPN 19988551	License Number In 3000887709	Licensee Name	Is Resident? IT Yes	Date Taken	Filter:	Credits Earned GEN-9 Previou	1 Lt •	



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6. You will now see the **Payment Details** and you can enter the Card information and all of the information needed to pay the fees. Click on the 'Finish' button when complete.

Aucholes / 2 Auchon / St dynam becaus		
Payment Details		
Card Holder First Name:		* Card Holder Last Name:
Billing Street Name:		* Billing City:
Billing State:		* Billing Country:
Select One	~	United States
Billing ZIP Code:		* Email:
* Amount:		* Phone Number:
\$3.00		



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OPTION 2: INPUT COURSE ROSTER MANUALLY

* It is only recommended to use the manual upload tool if uploading less than 5 courses.

For the manual option login to SBS for Organizations and navigate to your home screen. It should look like the screenshot below.
 Locate the Education Providers section, then click the 'Go To Dashboard' blue button.

SBS for Organizations State Based Systems				71125
Add Entity	Go To Add Entity	Report Generator		Go To Report Generator
Add Licensee Add Provider Add Company Complaint	𝗭 Add Company EHR 🛛 Add IRO	♂ Create Report		☑ Report Queue
License Administrators				Go To Dashboard
C Licensee Renewals	 Print Bulk Licenses 		Print Bulk Education T	ranscripts
☑ View Licensee Summary	Print Bulk Summary		Update Business Entit	y Contact Information
Save Searches for Dashboard	☑ Notifications		☑ User Settings	
Education Providers				Go To Dashboard
☑ Provider and Course Renewals	Course Roster Upload and Input		Provider, Course and I	instructor Applications
☑ View Provider Summary	Update Provider Addresses and Co	ontacts	C Attachments	
Provider and Course Summary Print	Education Transcript Print		Course Offerings	
Save Searches for Dashboard	Notifications		☑ User Settings	

3. The screen below will appear and you can click on the 'Course Roster' button.



4. Click on the blue 'Manual Input' button in the Upload Roster section.

tendees / 2 Review / 3 Pa	syment Details			
pload Roster				
Manual Input	+ Upload Roster File	Continuing Education	Pre-Licensing Education	
		Text Sample Data File (CE) Excel Sample Data File (CE)	Text Sample Data File (PLE) Excel Sample Data File (PLE)	



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5. Select the 'Provider', the 'Course' and the 'Date Taken'. Input the Licensee 'Name', the 'NPN' and the 'License Number' (optional). Click the blue 'Add' button.

■ State Services Go To Dashboard	
1 Attendees / 2 Review / 3 Payment Details	
Manual Roster	
Provider WEBBB, INC / 8888866 / MO	v General: 3
Course Aircraft hull and Insurance / 11111813 Date Taken Last Name NPN License Numb	v Jurisdiction: Missouri
11/21/2024 Halpertz 19945222 33338770 Add Reset Cancel 1	37

6. Verify all data input in Course Roster Details. Click the 'Next' button when ready to continue.

■ State Services	• Go To	Dashboard 👻								
1 Attendees / 2 Revi	ew / 3 Payr									
Course Roster Deta	ails									
Show 10 💗 ent	ries								F	ilter:
Jurisdiction	n It	Provider Number 💵	Course Name 👔	Course Number	NPN 11	License Number	Licensee Name	Is Resident?	Date Taken	Lt Credits Earned Lt
МО		8888866	Aircraft hull and Insurance	11111813	19945222	3333877097	Jim Halpertz	Yes	11/21/2024	GEN-3
Showing 1 to 1 of 1 e	entries									Previous 1 Next
Jurisdiction	Provider	Name F	Provider Number	Course Name			Course Number	Number of Attend	ees	Fee Amount
Missouri	WEBBB	, INC 8	888866	Aircraft hull an	nd Insurance		11111813	1		\$3.00
TOTAL										\$3.00
Previous Next	Finish	Cancel								

7.You will now see the Payment Details and you can enter all of the required information needed to pay the fees.8. Click on the 'Finish' button when complete.

Payment Details		
Card Holder First Name:	* Card Holder Last Name:	
Billing Street Name:	* Billing City:	
Billing State:	* Billing Country:	
Select One	♥ United States	
Billing ZIP Code:	* Email:	
Amount:	* Phone Number:	
\$3.00		



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