

# HOW DO I...



## ADD AN ENTITY?

### 1 Add Entity

The screenshot shows the 'ADD ENTITY CART' interface. It features four main panels: Licensee, Company, Provider, and IRO. Each panel has several input fields and a dropdown menu for 'Jurisdiction'. The Licensee panel includes fields for National Producer Number (NPN), Entity Type, Last Four Digits of SSN (SSN4), License Number, and another Entity Type. The Company panel includes FEIN, NAIC CoCode, SBS Company Number, and Jurisdiction. The Provider panel includes FEIN, Provider Number, and Jurisdiction. The IRO panel includes IRO Number and Jurisdiction. Each panel has an 'Add to Cart' button. There is also a 'Licensee File Upload' button and 'Template Instructions' in the Licensee panel.

**Add Entity:** The add entity screen allows users to save a licensee, company, provider, or IRO to their SBS for Organizations account. Simply input the required identifiers for the selected entity and click the Add to Cart button.

### 2 Review Added Entity

The screenshot shows the 'Review Added Entity' screen. At the top, there is a warning message: "Please review the new entities you selected for addition to your Managed account, click 'Next' to continue, click 'Previous' to Edit or click 'Cancel' to return to the home page." Below the message is a table with the following data:

License			
Jurisdiction	NPN	FEIN	Licensee Name
Delaware	17261305		Kathryn Graves

At the bottom of the screen, there are buttons for 'Previous', 'Next', 'Finish', and 'Cancel'.

**Review Added Entity:** After adding an entity to the cart, the review screen is displayed. This allows the user to quickly verify the information one last time before payment is required.

**NEED HELP?** CONTACT THE SBS HELP DESK • SBSHELP@NAIC.ORG • 816-783-8990

# HOW DO I...



**SBS**  
www.statebasedsystems.com

## ADD AN ENTITY?

PAGE 2 OF 2

### 3 [Payment Details](#)

State Based Systems

State Services - Go To Dashboard -

1 Application / 2 Review / 3 Payment Details / 4 Process Payment / 5 Receipt

Payment Details

\* Card Holder First Name:

\* Card Holder Last Name:

\* Billing Street Name:

\* Billing City:

\* Billing State: Select One

\* Billing Country: Canada

\* Billing ZIP Code:

\* E-mail:

\* Amount: \$5.95

\* Phone Number:

Previous Next Finish Cancel

**Payment Details:** The payment details screen allows the user to enter payment information. The user will be charged \$5.95 per licensee, per jurisdiction. Please note this is per licensee, not license type.

### 4 [View Entity Receipt](#)

State Based Systems

State Services - Go To Dashboard -

1 Application / 2 Review / 3 Payment Details / 4 Process Payment / 5 Receipt

⚠ This action will add the new entities you selected to your Managed account, click "Finish" to continue or click "Cancel" to return to the home page.

📌 Your Transaction Number is: 6923990644 Total Transaction Fees Paid: \$5.95 Transaction Date: 01/08/2016

Billing Information

Name:	Payment Method:	Amount:
Example Name	AUTHORIZATION	\$5.95
Address:	Authorization Number:	Payment Transaction ID:
1100 Walnut Street Kansas City, Missouri, 64108	6923990644	6923990644
Transaction Type:	Transaction Date:	Phone Number:
Add Entity	01/08/2016	816-783-8990

License

Jurisdiction	NPN	FEIN	Licensee Name
Delaware			Example Name

Grand Total: \$5.95

Previous Next Finish Cancel

**View Entity Receipt:** The view entity receipt page provides the payment confirmation and displays a summary of the entity and payment information. Selecting the finish button will bring the user to the external summary page where they will be able to select the inputted entity's dashboard.

**NEED HELP?** CONTACT THE SBS HELP DESK • SBSHELP@NAIC.ORG • 816-783-8990