



SBS FOR INDUSTRY • TRAINING GUIDE

ADD, UPDATE OR DELETE A LICENSEE EMAIL ADDRESS

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



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: 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 State Based Systems logo. Below the header is a large banner with the text "Your Insurance Regulatory Toolset" and a background image of two people looking at a computer. On the right side of the banner, there is a blue overlay with a "Step 1:" section containing a dropdown menu labeled "Select your jurisdiction:" and a "Step 2:" section. Below the banner, there are three main content areas. The first area on the left is a news item about the Iowa Insurance Division. The middle area is titled "Now available in the new version of SBS:" and contains two columns: "License Manager" with a list of services (Print License, Print Education Transcript, Update Email Address) and "Lookup" with a list of search options (Companies, Courses and Providers, Licensees). The third area on the right is titled "State Services" and contains a dropdown menu and a note to select a jurisdiction to see a full list of services. Three green numbered callouts (1, 2, 3) are overlaid on the image to indicate the steps described in the text.

1. Step 1 / Step 2: In the top right, select a jurisdiction under 'Step 1.' From the options that appear under 'Step 2,' 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.'

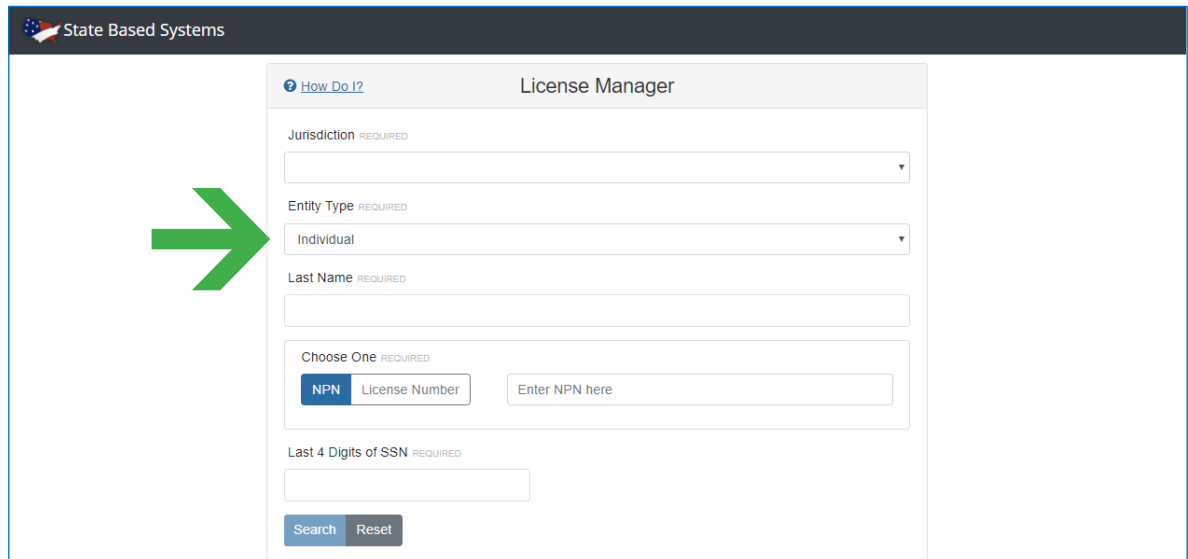
3. License Manager Direct Link: Select 'License Manager' from the home page. **This option is only available for states that have transitioned to the new version of SBS.**

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→ STEP 2: LICENSE MANAGER CRITERIA

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



State Based Systems

How Do I? License Manager

Jurisdiction REQUIRED

Entity Type REQUIRED
Individual

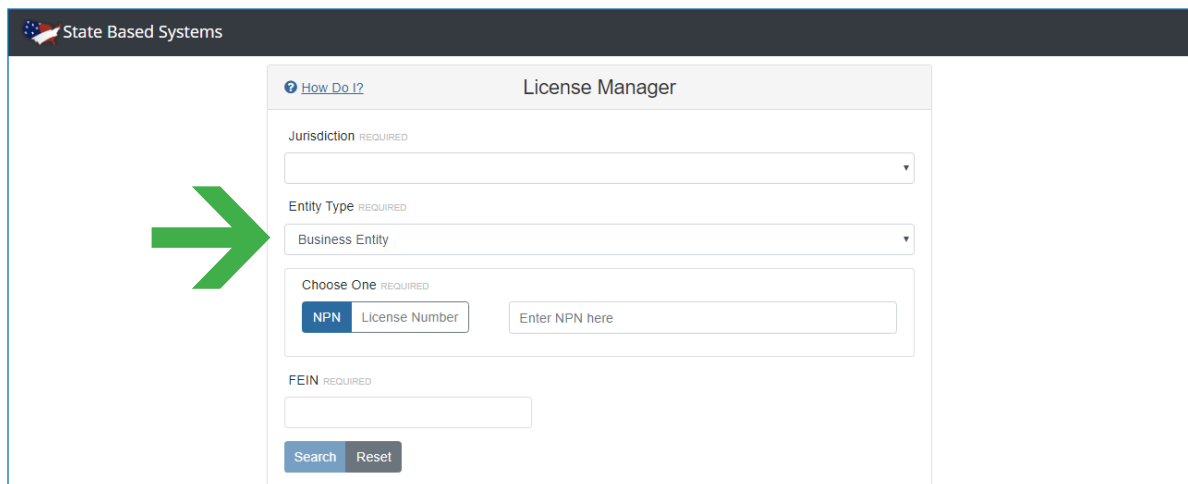
Last Name REQUIRED

Choose One REQUIRED
NPN License Number Enter NPN here

Last 4 Digits of SSN REQUIRED

Search Reset

A green arrow points to the Entity Type dropdown menu.



State Based Systems

How Do I? License Manager

Jurisdiction REQUIRED

Entity Type REQUIRED
Business Entity

Choose One REQUIRED
NPN License Number Enter NPN here

FEIN REQUIRED

Search Reset

A green arrow points to the Entity Type dropdown menu.

➔ 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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