



# SBS FOR INDUSTRY • TRAINING GUIDE

## COURSE AND PROVIDER LOOKUP

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➔ **NEED HELP? CONTACT THE SBS HELP DESK • [SBSHELP@NAIC.ORG](mailto:SBSHELP@NAIC.ORG) • 816-783-8990**



**NAIC** National Association of  
Insurance Commissioners

The **Lookup** tool provides real-time, direct access to education provider information and the courses they offer. If applicable, you can also find specific offerings for approved courses.

## ➔ STEP 1: LOOKUP TOOL ON SBS WEBSITE HOME PAGE

Go to [www.statebasedsystems.com](http://www.statebasedsystems.com). There are three ways to navigate to the Lookup 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 an image of two people looking at a laptop. On the right side, there is a blue overlay with three numbered steps: Step 1: Select your jurisdiction: (with a dropdown menu showing "Select One"), Step 2: State Services (with a dropdown menu), and Step 3: Lookup (with a dropdown menu). Below the banner, there are three columns of content. The first column contains a notice about the Iowa Insurance Division going live on the new version of SBS on Thursday, June 11, 2020. The second column is titled "Now available in the new version of SBS:" and lists "License Manager" and "Lookup" with their respective services. The third column is titled "State Services" and contains a dropdown menu and a note to select a jurisdiction to see a full list of its available services.

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

**2. State Services Launch Page:** In the bottom right hand corner of the screen, select a jurisdiction from the 'State Services' drop down. Select 'Lookup' or 'Course Lookup,' depending on what is available on the State Launch page.

**3. Lookup Direct Link:** Select 'Lookup' 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: COURSE AND PROVIDER SEARCH CRITERIA

Enter search criteria using the following guidelines:

The screenshot shows a 'Lookup Search' form with the following fields and callouts:

- 1** Jurisdiction REQUIRED: A dropdown menu with 'Alabama' selected.
- 2** Search Type REQUIRED: A dropdown menu with 'Course or Provider' selected.
- 2** Provider Name: A text input field with 'Enter Provider Name' placeholder.
- Education Type: A dropdown menu.
- Course Method: A dropdown menu.
- Course Group: A dropdown menu.
- 3** Offering Location Criteria: A section containing:
  - Offering Start Date: A date input field with a calendar icon.
  - Offering End Date: A date input field with a calendar icon.
  - Offering City: A text input field.
  - Offering State: A dropdown menu.
  - Offering Zip: A text input field.
  - Provider Number: A text input field.
  - Course Number: A text input field.
  - Course Name: A text input field.

At the bottom of the form, there is a checkbox for 'I agree to the NAIC's Terms and Conditions', a 'Search' button, and a 'Reset' button.

**1. Required Search Criteria:** Select the jurisdiction of the course or provider you want to look up. Then, select 'Course' or 'Provider' from the 'Search Type' drop down. These two fields are required.

**2. Optional Search Criteria:** Use additional search criteria to narrow your results. Clicking into the 'Provider Name' field will display all approved providers in the selected jurisdiction in alphabetical order. You can also start to type in the 'Provider Name' field and the system will begin to filter. All other additional search criteria are drop down values based on specific jurisdiction categorizations. If the loading icon spins too long, enter additional criteria to refine your search.

**3. Offering Location Search Criteria:** For jurisdictions that post course offerings, search for class offerings based on time or location of the offering and more.

## ➔ STEP 3: COURSE SEARCH RESULTS

View and modify search results. By default, results display in alphabetical order by Course Name. Columns in the result set include Course Name, Course Number, Credits, Group, Provider Name, Education Type and Method. For more information the course and provider, click the Course Name link to navigate to the Course Summary Page.

State Based Systems - Alabama

Lookup Search

How Do I?

Jurisdiction REQUIRED

Alabama

Search Type REQUIRED

Course or Provider

Provider Name

A.D. Banker & Company, L.L.C.

Education Type

Course Method

Course Group

Show 10 entries

Showing 1 to 10 of 76 entries

Filter

Course Name	Course Number	Credits	Group	Provider Name	Education Type	Method
<a href="#">4 HOUR ANNUITY SUITABILITY</a>	21143	4-General	Life Accident And Health	A.D. Banker & Company, L.L.C.	Continuing Education	Self Study (Online)
<a href="#">4 HOUR ANNUITY SUITABILITY-WEBINAR</a>	21976	4-General	Life Accident And Health	A.D. Banker & Company, L.L.C.	Continuing Education	Classroom Instructions
<a href="#">4 HOUR LONG-TERM CARE PARTNERSHIP</a>	23447	4-Long Term Care	LTC	A.D. Banker & Company, L.L.C.	Continuing Education	Self Study (Correspondence), Self Study (Online)
<a href="#">4 HOUR LTC PARTNERSHIP-WEBINAR</a>	24278	4-Long Term Care	LTC	A.D. Banker & Company, L.L.C.	Continuing Education	Classroom Instructions
<a href="#">ADDRESSING THE RETIREMENT SHORTFALL</a>	28353	1-General	Life Accident And Health	A.D. Banker & Company, L.L.C.	Continuing Education	Classroom Instructions
<a href="#">ADJUSTERS AND CATASTROPHES</a>	6000036746	7-General	Adjuster, Property and Casualty	A.D. Banker & Company, L.L.C.	Continuing Education	Self Study (Correspondence), Self Study (Online)
<a href="#">ADJUSTERS, CATASTROPHES, FRAUD &amp; ETHICS</a>	6000037590	3-Ethics, 21-General	Adjuster, Ethics, Property and Casualty	A.D. Banker & Company, L.L.C.	Continuing Education	Self Study (Online)
<a href="#">AML 1-HOUR OVERVIEW</a>	6000052082	1-Ethics	Ethics	A.D. Banker & Company, L.L.C.	Continuing Education	Self Study (Online)
<a href="#">AML 1-HOUR REFRESHER-WEBINAR</a>	6000054403	1-General	General	A.D. Banker & Company, L.L.C.	Continuing Education	Classroom Instructions
<a href="#">AML KNOW YOUR MONEY-KNOW YOUR CUSTOMER</a>	6000054428	4-General	General	A.D. Banker & Company, L.L.C.	Continuing Education	Self Study (Online)

First Previous 1 2 3 Next Last

- 1. Side Navigation Search Criteria:** Your selected search criteria stays in tact. Change your results as desired updating criteria on this screen without having to navigate back to the previous screen.
- 2. Show # Entries:** Display results in groups of 10, 25, 50 or 100.
- 3. Filter:** Search the entire result set for a specific string of text to narrow your results more quickly.
- 4. Course Name Link:** Click on the Course Name link to navigate to the Course Summary Page for more information about the course and provider.

## ➔ STEP 4: COURSE SUMMARY PAGE

The Course Summary Page contains information about the provider, course, and if applicable, will list available course offerings.

State Based Systems - Oklahoma									
<b>Provider</b>									
Provider Name: CEU INSTITUTE, INC.			Provider Number: 195			Website: www.ceuinstitute.net			
Business Phone: (407) 324-0500			Business Fax: (407) 302-2185			Business Email: accreditation@ceuinstitute.net			
Toll Free Phone:			Business Address:						
			144 W Crystal Lake Ave Suite 1010 LAKE MARY, FL 32746 United States						
<b>Course</b>									
Course Name: 2019 Workers' Compensation Trend Analysis (1hr)				Course Number: 6000061535		Course Description:			
<b>Course Hours</b>									
Course Method			Course Group			Credit Type		Course Credits	
Webinar			Adjuster General			General		1	
<b>Course Offerings</b>									
Offering ID	Status	Registration Application	Start Date	Start Time	End Date	End Time	Location Information	Comments	Attachments
500118638	ACTIVE		04/09/2020	02:00 PM	04/09/2020	02:00 PM	250 Progressive Way Westerville, Ohio 43082 United States		