



SBS FOR INDUSTRY • TRAINING GUIDE

VIEW AND PRINT A LICENSE

➔ TABLE OF CONTENTS

<u>STEP 1: LICENSE MANAGER TOOL ON SBS WEBSITE HOME PAGE</u>	<u>2</u>
<u>STEP 2: LICENSE MANAGER CRITERIA</u>	<u>3</u>
<u>STEP 3: LICENSE MANAGER SUMMARY PAGE - LICENSE PRINT</u>	<u>4</u>

➔ 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 view and print the license.

→ 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 logo (State Based Systems). Below the header is a large banner with the text "Your Insurance Regulatory Toolset" and an image of two people looking at a computer. On the right side, there is a blue overlay with a "Step 1:" dropdown menu labeled "Select your jurisdiction:" and a "Step 2:" section. In the bottom left, there is a news item about the Iowa Insurance Division. In the bottom center, there is a section titled "Now available in the new version of SBS:" with two columns: "License Manager" and "Lookup". In the bottom right, there is a "State Services" dropdown menu with 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 'Print License.'

2. State Services Launch Page: In the bottom right hand corner of the screen, select a jurisdiction from the 'State Services' drop down. Select 'License Manager' or 'Print Your License,' depending on what is available on the State Launch Page.

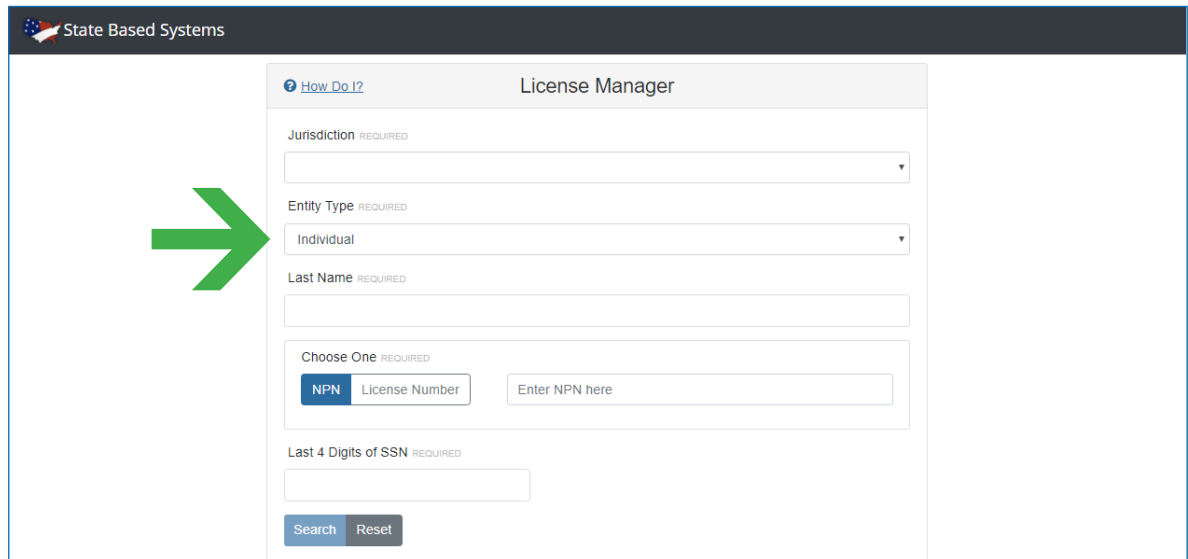
3. License Manager Direct Link: Select 'License Manager' from the home page. **This option is only available for states that have transitioned to the new version of SBS.**

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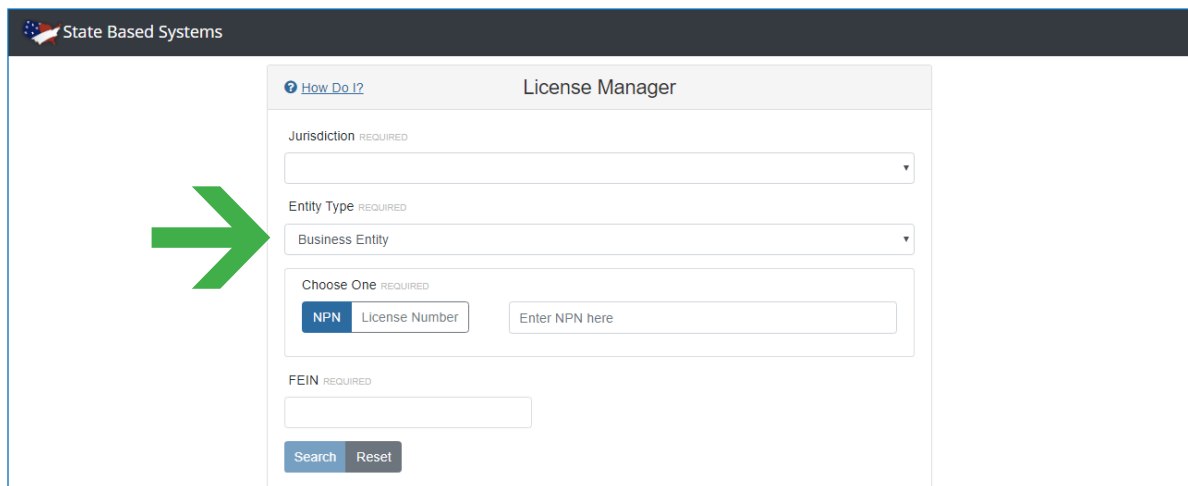


➔ STEP 2: LICENSE MANAGER CRITERIA

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



The screenshot shows the 'License Manager' form in the 'State Based Systems' interface. A green arrow points to the 'Entity Type' dropdown menu, which is set to 'Individual'. The form includes the following fields: 'Jurisdiction' (REQUIRED), 'Entity Type' (REQUIRED), 'Last Name' (REQUIRED), 'Choose One' (REQUIRED) with options 'NPN' and 'License Number', and 'Last 4 Digits of SSN' (REQUIRED). There is also an 'Enter NPN here' input field. At the bottom are 'Search' and 'Reset' buttons.



The screenshot shows the 'License Manager' form in the 'State Based Systems' interface. A green arrow points to the 'Entity Type' dropdown menu, which is set to 'Business Entity'. The form includes the following fields: 'Jurisdiction' (REQUIRED), 'Entity Type' (REQUIRED), 'Choose One' (REQUIRED) with options 'NPN' and 'License Number', and 'FEIN' (REQUIRED). There is also an 'Enter NPN here' input field. At the bottom are 'Search' and 'Reset' buttons.

➔ 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 'Print License' icon. A PDF file will generate at the bottom of your screen. Click to open.

When the PDF license opens, use the icons in the upper right hand corner of the screen to download the document to your computer and to print.