HOW DO I: GENERATE A REPORT OF LICENSEES?
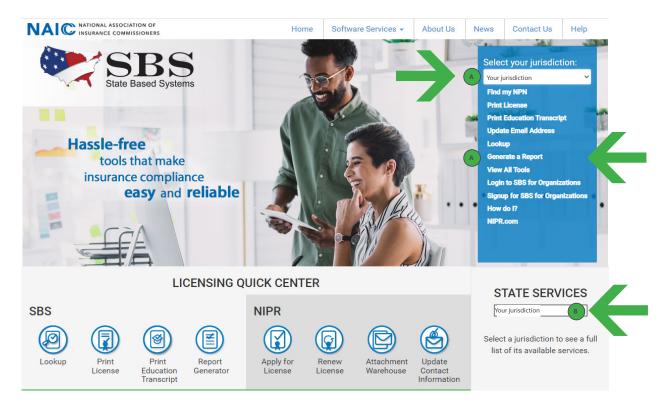
Report Generator allows you to request a list of data for a specific jurisdiction using a variety of search criteria. Some of the data included in the report includes: license number, license type, license status, CE compliance, full business address, email address and line of authority.

1 Navigate to the Report Generator tool from the SBS website home page

There are two ways to navigate to the Report Generator tool:

- **A. Select Your Jurisdiction:** In the top right, select your jurisdiction. From the options that appear select 'Generate a Report.'

- **B. State Services Launch Page:** In the bottom right hand corner of the screen, select a jurisdiction from the 'State Services' dropdown. Select 'Report Generator' on the State Launch Page.

2 Select criteria for your report

Use a robust selection of criteria to narrow the results of your report. Click 'Next' when finished. Use the support links to the left to retrieve an existing report and to learn more about Report Generator before running your report.

3 **Review report details and name your report**

Review the summary of your report, including the number of rows returned and the cost. Return to the search criteria to make changes by using the 'Previous' button. When finished, check 'I agree to the NAIC's Terms and Conditions' and click 'Next.'

4 **Review payment summary**

Review the cost for your report. Note that all fees are non-refundable. Click 'Next.'

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5 **Enter payment details**

Enter cardholder information. When you click 'Finish,' you will arrive at a screen to enter payment details which will accept PayPal, American Express, Discover, MasterCard and VISA payment types.

6 **Keep confirmation details for your record and download your report**

Download your report by clicking the blue 'Download Your Report.' The report will generate as a CSV file. Keep these details for your record by printing this page or saving the confirmation email. You will need your Pin Number and Transaction Number if want to retrieve this report again.