

Landing Dashboard

This page will appear whenever you log in to SBS, it lists all the license types available for management and what you can do with each one.

The black bar at the top of the screen will remain at the top and display pertinent information to the page you are on.

System Menu (*button with three lines*): This is the menu button. You can use this button to come back to the landing dashboard or do a search of SBS for general information on entities you do not manage.

State Services: The drop down lets you switch between different states.

Go To Dashboard: The drop down lets you go between different dashboards (Education Providers, Companies, etc)

For example, if you want to see all your licensees in Idaho you would select Idaho under State Services and Licensee Administrators under Go to Dashboard

Add Entity

Add Entity Go To Add Entity

- Add Licensee
- Add Provider
- Add Company
- Add Company EHR
- Add IRO

This section allows you to add different types of entities to your account.

- Add Licensee: Add an individual or business entity.
- Add Provider: Add a continuing education provider.
- Add Company: Add a risk baring entity.
- Add Company EHR: External healthcare review company
- Add IRO: Add an independent ratings organization.

Report Generator

Report Generator Go To Report Generator

- Create Report
- Retrieve Report
- Report Queue

This section allows you to request or retrieve reports made in the Report Generator.

- Create Report:
- Retrieve Report
- Report Queue

Report Generator

License Administrators

- Licensee Renewals
- View Licensee Summary
- Save Searches for Dashboard
- Print Bulk Licenses
- Print Bulk Summary
- Notifications
- Print Bulk Education Transcripts
- Update Business Entity Contact Information
- User Settings

This section lists what you can view and do in a licensee's record on SBS.

- Licensee Renewals
- View Licensee Summary
- Save Searches for Dashboard
- Print Bulk Licenses
- Print Bulk Summary
- Notifications
- Print Bulk Education Transcripts
- Update Business Entity Contact Information
- User Settings

Education Providers

Education Providers

- Provider and Course Renewals
- View Provider Summary
- Provider and Course Summary Print
- Save Searches for Dashboard
- Course Roster Upload and Input
- Update Provider Addresses and Contacts
- Education Transcript Print
- Notifications
- Provider, Course and Instructor Applications
- Attachments
- Course Offerings
- User Settings

This section lists what you can view and do in an Education Provider's record.

- Provider and Course Renewals
- View Provider Summary
- Provider and Course Summary Print
- Save Searches for Dashboard
- Course Roster Upload and Input
- Update Provider Addresses and Contacts
- Education Transcript Print
- Notifications
- Provider, Course and Instructor Applications
- Attachments
- Course Offerings
- User Settings

Companies

Companies

- View Company Summary
- Save Searches for Dashboard
- Update Company Addresses and Contacts
- Notifications
- Company Summary Print
- User Settings

This section lists what you can view and do in a risk baring entity's record.

- View Company Summary
- Save Searches for Dashboard
- Update Company Addresses and Contacts
- Notifications
- Company Summary Print
- User Settings

Companies - External Healthcare Review (EHR)

Companies - External Healthcare Review (EHR)

- External Healthcare Review
- Notifications
- User Settings

This section lists what you can view and do in an external healthcare review company's record.

- External Healthcare Review
- Notifications
- User Settings

Independent Review Organization (IRO)

Independent Review Organization (IRO)

- External Healthcare Review
- Notifications
- User Settings

This section lists what you can view and do in an independent ratings organization's record.

- External Healthcare Review
- Notifications
- User Settings

How to add an entity.

1. Click on "Go to Add Entity"

The screenshot shows the top navigation bar of the system. On the left, there is a user profile icon and the text 'Add Entity'. On the right, there is a blue button labeled 'Go to Add Entity'. Below this bar, there is a horizontal menu with five items: 'Add Licensee', 'Add Provider', 'Add Company', 'Add Company EHR', and 'Add IRO', each with a small icon to its left.

2. Select the type of entity to add under "Type:".

The screenshot shows two 'Type:' dropdown menus. The first menu has 'Licensee' selected. The second menu is open, showing a list of options: 'Licensee', 'Licensee File Upload', 'Provider', 'Company', 'IRO', and 'Company EHR'. The 'Licensee' option is highlighted in the list.

3. Enter the required information and click "Add to Cart". Note: the different available entities are pictured below.

This block contains five separate screenshots of the form fields for different entity types, separated by vertical dashed lines. Each form has an 'Add to Cart' and 'Reset' button at the bottom.

- Licensee:** Fields include National Producer Number (NPN), License Number, Entity Type (dropdown), Last Four Digits of SSN (SSN4), and Jurisdiction (dropdown).
- Provider:** Fields include Provider Number, Jurisdiction (dropdown), and PIN.
- Company:** Fields include Jurisdiction (dropdown), FEIN, PIN, NAIC CoCode, and SBS Company Number.
- IRO:** Fields include IRO Number, PIN, and Jurisdiction (dropdown).
- Company External Health Review:** Fields include Jurisdiction (dropdown), FEIN, Company External Health Review PIN, NAIC CoCode, and SBS Company Number.

4. Repeat step 3 for all entities you wish to add then click "Next".

The screenshot shows the 'Add Entity Cart' interface. At the top, it says 'Add Entity Cart' with a dropdown arrow. Below that, it says 'Show 10 entries' and 'Filter:'. A table lists the added entities. The table has columns: Type, Name, NPN, Last 4 Digits of SSN, CoCode, Last 4 Digits of FEIN, Count, Fees, and Total Fees. There is one entry: Provider, DOI Test Provider, with a count of (1) and fees of \$0.00. At the bottom right, it says 'Total Fees \$0.00' and has 'Previous', '1', and 'Next' buttons. At the bottom left, there are 'Previous', 'Next', 'Finish', and 'Cancel' buttons.

5. Make sure all entities are listed and click "Next". This page will list out each state the entity is licensed in.

The screenshot shows a summary page with a yellow warning banner at the top: '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 banner is a table with columns: Jurisdiction, Provider Number, FEIN, Provider Type, and Provider Name. The table has one row: Idaho, 500027342, (blank), Association, DOI Test Provider. At the bottom right, it says 'Grand Total: \$0.00'. At the bottom left, there are 'Previous', 'Next', 'Finish', and 'Cancel' buttons.

6a. If no fee is due you are finished.

6b. If a fee is due enter the payment information and click "Finish".

The screenshot shows the 'Payment Details' form. It has two columns of fields. The left column includes: Card Holder First Name, Billing Street Name, Billing State (dropdown), Billing ZIP Code, and Amount (\$172.50). The right column includes: Card Holder Last Name, Billing City, Billing Country (dropdown), Email, and Phone Number. At the bottom, there are 'Previous', 'Next', 'Finish', and 'Cancel' buttons.

Provider Dashboard

State Services Go To Dashboard

- Add Entity
- Renewal Application
- Instructor Original Application
- User Settings
- Notifications
- Education Transcript Search
- Course Original Application
- Course Roster
- Course Roster Search
- Course Offering Maintenance

Provider Matrix

Show 10 entries Filter: Export to Excel

	License State	Provider Number	Provider Name	Provider Type	Provider Status	Expiration Date	Education Type	Business Address
<input type="checkbox"/>	Idaho	500027342	DOI Test Provider	Association	Approved		Continuing Education	Boise, ID 83720

Showing 1 to 1 of 1 entries Previous 1 Next

The Provider Dashboard allows you to view and make changes to Continuing Education Providers you have added to your account. There are tools for the following actions:

Add Entity: Adding a CE provider to the account.

Renewal: Renew a CE course.

Instructor Original Application: Submit an application for a new instructor.

User Settings: Change the user settings for the account as they pertain to Providers.

Notifications: These are set up in User Settings and lets you know if any accounts have been changed or updated.

Education Transcript Search: Search for an individual licensee's transcript.

Course Original Application: Submit an application for a new course.

Course Roster: Upload course roster to post to the attendant's records.

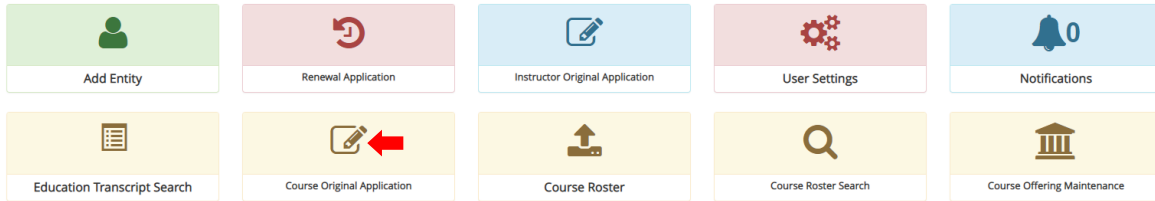
Course Roster Search: Search your previously submitted course rosters.

Course Offering Maintenance: Search your current course offerings to make changes quickly.

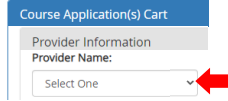
The Provider Matrix lists all Providers currently linked to your account.

How to submit a course application.

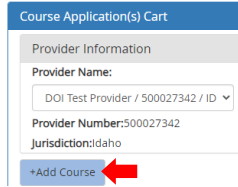
1. Click on "Course Original Application".



2. Select which provider you want to submit the course for under "Provider Name:"



3. Click "+Add Course".



4. Enter the required information and click "Next".

The screenshot shows the 'New Course Application' form. The 'Next' button is highlighted with a red arrow. The form contains various fields for course information, including title, difficulty, and provider details.

5. Select the appropriate options, enter the credit hours, and click "Next".

Course Methods Descriptions

Instructor Led Presentation
Classroom: In person
National: In person
Seminar: Same as classroom
Teleconference: Online
Webcast: Online

At Your Own Pace Completion
Self-Study: Online or by mail
Correspondence: By mail
Video/Audio/CD/DVD: Prerecorded
Internet: Website based

Edits By Jurisdiction

Idaho

*Course Method:
 Classroom
 Correspondence
 Webcast
Teleconference

*Course Group:
Adjuster
 Annuity Suitability Best Interest
 Bail
 Casualty

Course Groups

Adjuster
 Annuity Suitability
 Bail
 Casualty
 Ethics
 Flood
 General

Health
 Life
 Long Term Care
 Property
 Your Health Idaho
 + Combinations of the above

6. Upload the required documents and click "Next".

Upload Attachment

*Attachment:
 + File Upload

*Attachment Description:
 255 characters remaining

*Effective Date:
 05/18/2023

Attachment Status:
 [Dropdown]

Upload Cancel

Attachments

File Name	Attachment Description	Attachment Status	Attached By	Effective Date	Attached Date
IMG_20200831_175920_812.jpg	Test			05/18/2023	

Print PDFs

Upload Attachment

Required Documents:

- Detailed outline or agenda, with timing of segments indicated
- Home State Approval Letter
- (Non-residents only)
- Exam
- Attendance Policy
- Webinar Policy (webinars only)

7. Review the course information and click "Finish".

The screenshot shows the course information review screen. The 'Finish' button is highlighted with a red arrow. The form displays the course details entered in previous steps, including title, provider information, and course group.

8. Repeat steps 2-6 for each course you want to add. When all courses are added, click "Next".

Course Name	Provider Name	Provider Number	Jurisdiction(s)	Fees			
DOI Test Course	DOI Test Provider	500027342	Idaho	\$25.88			
				Total Fees	\$25.88		

Showing 1 to 1 of 1 entries

Previous **Next** Cancel

9. Review the list of courses and click "Next".

Review							
Course Information							
Jurisdiction	Provider	Course Name	Education Type	Course Method	Course Group	Course Credits	Fees
Idaho	DOI Test Provider / 500027342	DOI Test Course	Continuing Education	Teleconference	Adjuster	General: 1	\$25.88
Grand Total:							\$25.88

Previous **Next** Cancel

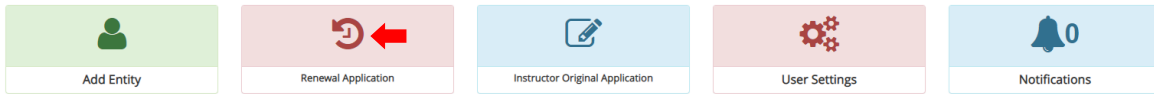
10. Enter your payment information and click "Finish".

Payment Details	
* Card Holder First Name:	* Card Holder Last Name:
<input type="text"/>	<input type="text"/>
* Billing Street Name:	* Billing City:
<input type="text"/>	<input type="text"/>
* Billing State:	* Billing Country:
Select One	United States
* Billing ZIP Code:	* Email:
<input type="text"/>	<input type="text"/>
* Amount:	* Phone Number:
\$25.88	<input type="text"/>

Previous **Next** **Finish** Cancel

How to renew a course.

1. Click on "Renewal Application"



2. Under "Renew" select "Course Only Renewal".

Renew	Provider Number	Provider Name	Jurisdiction	Expiration Date	Renew Course(s)	Annual Course Fee Type	Course Fee	Total Fee
Course Only Renewal	500027342	DOI Test Provider	Idaho		Select courses	Per Course Fe	\$25.88	\$25.88
Grand Total:								\$25.88

3. Click "Select courses".

Renew	Provider Number	Provider Name	Jurisdiction	Expiration Date	Renew Course(s)	Annual Course Fee Type	Course Fee	Total Fee
No renewal	500027342	DOI Test Provider	Idaho		Select courses	Per Course Fe	\$0.00	\$0.00
Grand Total:								\$0.00

4. Click the box next to the Course(s) that needs renewed then click "Save".

Select	Course Number	Course Name	Expiration Date	Application Fee	Processing Fee	Total Fee
<input checked="" type="checkbox"/>	6000148243	Test Course	05/30/2023	\$25.00	\$0.88	\$25.88
Grand Total:						\$0.00

5. Click "Next".

Renew	Provider Number	Provider Name	Jurisdiction	Expiration Date	Renew Course(s)	Annual Course Fee Type	Course Fee	Total Fee
Course Only Renewal	500027342	DOI Test Provider	Idaho		Select courses	Per Course Fe	\$25.88	\$25.88
Grand Total:								\$25.88

Previous

6. Double check your course list and press "Next".

Provider Number	Provider Name	Jurisdiction	Expiration Date	Renew Provider(s)	Annual Course Fee	Course(s)	Course Fee	Total Fee
500027342	DOI Test Provider	Idaho		No		6000148243 - Test Course - 05/30/2023 Course Method: Classroom Course Group: Health Credit Hours: 1 General	\$25.88	\$25.88
Grand Total:								\$25.88

Previous

7. Enter your payment information and click "Finish".

1 Education Renewal / 2 Review / 3 Payment Details

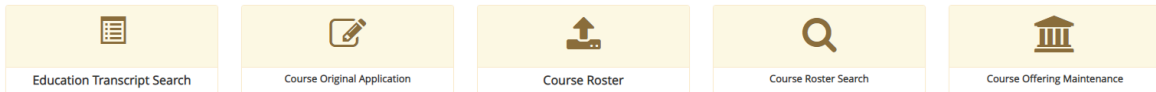
Payment Details

* Card Holder First Name:	<input type="text"/>	* Card Holder Last Name:	<input type="text"/>
* Billing Street Name:	<input type="text"/>	* Billing City:	<input type="text"/>
* Billing State:	<input type="text" value="Select One"/>	* Billing Country:	<input type="text" value="United States"/>
* Billing ZIP Code:	<input type="text"/>	* Email:	<input type="text"/>
* Amount:	<input type="text" value="\$25.88"/>	* Phone Number:	<input type="text"/>

Previous

How to submit course roster.

1. Click on "Course Roster"



Upload

2. Click on "+ Upload Roster File" and select the file to upload.



Manual Input

2a. Click on "Manual Input".



2b. Enter the students information and click "Add". Repeat until all students have been added.

Manual Roster

*Provider: DOI Test Provider / 500027342 / ID

*Course: Select One

*Date Taken: [] *Last Name: [] NPN: [] License Number: []

Buttons: Add, Reset, Cancel

3. Correct any errors then press "Next". Note: corrections can be made by clicking the blue pencil icon next to the entry.

Course Roster Details

0 of 3 Selected

Show 10 entries

Select	Jurisdiction	Provider Number	Course Name	Course Number	NPN	License Number	Licensee Name	Is Resident?	Date Taken	Credits Earned	
<input type="checkbox"/>	ID	500027342	Test Course	6000148243	18648733	18648733	ALBERTO ANDRADO	No	05/19/2023	GEN-1	
<input type="checkbox"/>	ID	500027342	Test Course	6000148243	543212 NPN not found	4514411 License Number not found.	Ben Flora	No	05/19/2023	GEN-1	

Showing 1 to 3 of 3 entries

Buttons: Previous, Next, Cancel

4. Verify the roster and click "Next".

Course Roster Details

Show 10 entries

Jurisdiction	Provider Number	Course Name	Course Number	NPN	License Number	Licensee Name	Is Resident?	Date Taken	Credits Earned
ID	500027342	Test Course	6000148243	18648733	18648733	ALBERTO ANDRADO	No	05/19/2023	GEN-1

Showing 1 to 1 of 1 entries

Jurisdiction	Provider Name	Provider Number	Course Name	Course Number	Number of Attendees	Fee Amount
Idaho	DOI Test Provider	500027342	Test Course	6000148243	1	\$1.00
TOTAL						\$1.00

Buttons: Previous, Next, Cancel

5. Enter your payment information and click "Finish".

Payment Details

* Card Holder First Name: [] * Card Holder Last Name: []

* Billing Street Name: [] * Billing City: []

* Billing State: Select One * Billing Country: United States

* Billing ZIP Code: [] * Email: []

* Amount: \$1.00 * Phone Number: []

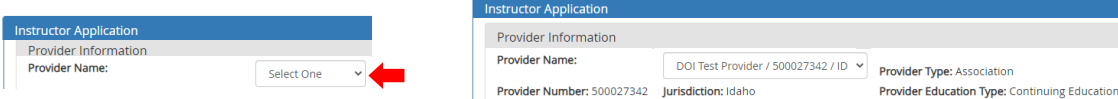
Buttons: Previous, Next, Finish, Cancel

How to submit an instructor.

1. Click on "Instructor Original Application"



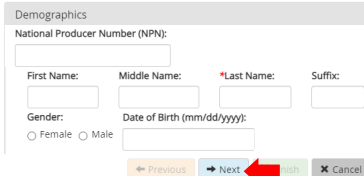
2. Select the provider from the drop down list.



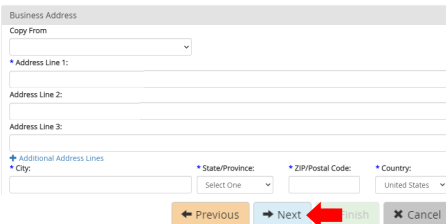
3. Click "Add Instructor".



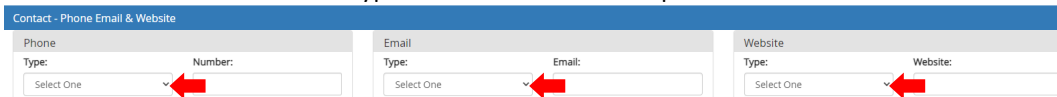
4. Enter the Instructor's information and click "Next".



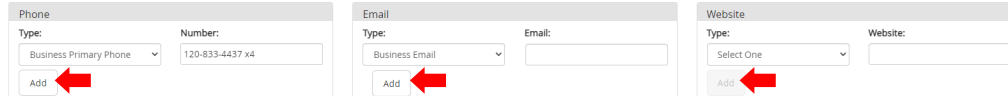
5. Enter the Instructor's information and click "Next".



6. Select type of contact from the drop down menu.



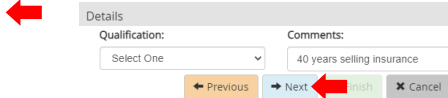
7. Enter the Instructor's information and click "Add".



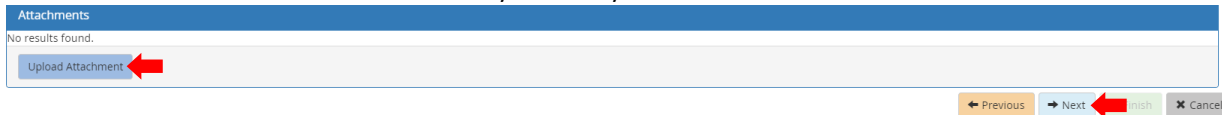
8. Click "Next".



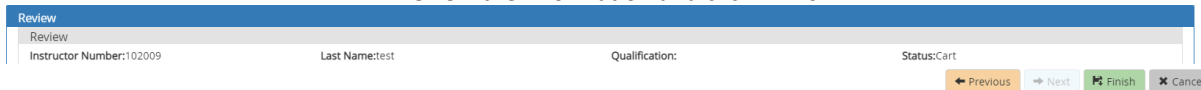
9. Enter the Instructor's qualification and click "Next".



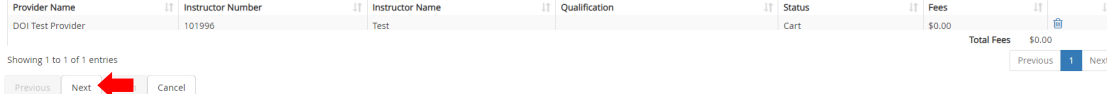
10. Add any necessary documents.



11. Review the information and click "Finish".



12. Click "Next".



13. Click "Finish".



Notifications.

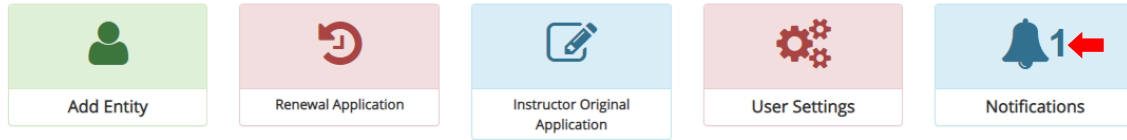
You can set up SBS to send you a notification if any of the following take place:

- Provider Address Change
- Provider Contact Change
- Provider Renewal Reminder
- Provider Renewal
- Provider Renewal Approval
- Provider Correspondence Creation
- Course Submittal
- Course Approval
- Course Renewal
- Course Renewal Approval
- Course Roster Upload
- Instructor Submittal
- Instructor Approval
- Add Entity Submittal

Email Notifications go the business e-mail address recorded in SBS.

System Notifications will appear on the Provider Dashboard as an additional number on the Notifications bell icon.

1. Click on "Notifications"



2. View the notification and take any needed action.

Notifications

[Delete](#)

Show entries Filter:

<input type="checkbox"/>	License State	Provider	Provider Status	Course	Instructor	Education Type	Notification	Notification Date
<input type="checkbox"/>	Idaho	DOI Test Provider / 500027342	Approved			Continuing Education	Provider Address Change	05/22/2023

Showing 1 to 1 of 1 entries [Previous](#) [1](#) [Next](#)

- **License State:** Resident state of the entity the notification refers to.
- **Provider:** Provider the notification refers to.
- **Provider Status:** Status of the provider the notification refers to.
- **Course:** The course number the notification refers to (if applicable).
- **Instructor:** The instructor the notification refers to (if applicable).
- **Education Type:** The type of education the notification refers to.
- **Notification:** Why you got the notification.
- **Notification Date:** The Date the notification generated.

3. When ready to delete the notification, click the box next to the notification you want to delete.

<input type="checkbox"/>	License State	Provider	Provider Status	Course	Instructor	Education Type	Notification	Notification Date
<input checked="" type="checkbox"/>	Idaho	DOI Test Provider /	Approved			Continuing Education	Provider Address Change	05/22/2023

3. When all notifications you wish to remove have been selected click the pink delete button.

[Delete](#)

Show entries Filter:

<input type="checkbox"/>	License State	Provider	Provider Status	Course	Instructor	Education Type	Notification	Notification Date
<input checked="" type="checkbox"/>	Idaho	DOI Test	Approved			Continuing	Provider Address	05/22/2023

4. Press "Okay" to return to the provider dashboard.

<input type="checkbox"/>	License State	Provider	Provider Status	Course	Instructor	Education Type	Notification	Notification Date
<input type="checkbox"/>	Idaho	DOI Test Provider / 500027342	Approved			Continuing Education	Provider Address Change	05/22/2023

Showing 1 to 1 of 1 entries [Previous](#) [1](#) [Next](#)

[OK](#)

User Settings.

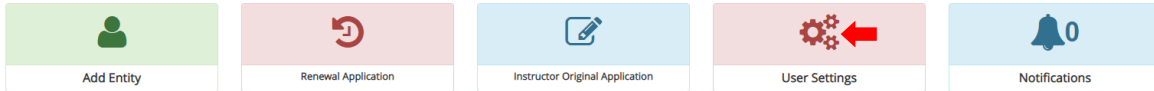
You can set up SBS to send you a notification with any of the following take place:

- Provider Address Change
- Provider Contact Change
- Provider Renewal Reminder
- Provider Renewal
- Provider Renewal Approval
- Provider Correspondence Creation
- Course Submittal
- Course Approval
- Course Renewal
- Course Renewal Approval
- Course Roster Upload
- Instructor Submittal
- Instructor Approval
- Add Entity Submittal

Email Notifications go the business e-mail address recorded in SBS.

System Notifications will appear on the Provider Dashboard as an additional number on the Notifications bell icon.

1. Click on "User Settings"



2. Click on the Option you would like to change.

Notifications - Provider

Select "Yes" to receive an email or system notification for changes to your account.

	Yes/No to all System Notifications: <input checked="" type="checkbox"/> Select All		Yes/No to all to Email Notifications: <input checked="" type="checkbox"/> Select All					
	System	Email	System	Email	System	Email		
Provider Address Change:	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes	Provider Correspondence Creation:	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes	Course Roster Upload:	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes
Provider Contact Change:	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes	Course Submittal:	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes	Instructor Submittal:	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes
Provider Renewal Reminder:	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes	Course Approval:	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes	Instructor Approval:	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes
Provider Renewal:	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes	Course Renewal:	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes	Add Entity Submittal:	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes
Provider Renewal Approval:	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes	Course Renewal Approval:	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes			

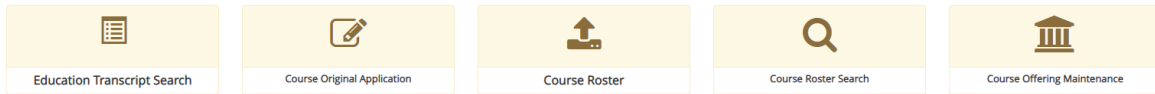
3. When all changes have been made click "Save".

Renewal Approval: _____

How to use the Course Offering Maintenance.

If you have a lot of courses to manage the Course Offering Maintenance will be helpful. This tool allows you to quickly search your approved courses to find a specific one. Once you select the course from the list you can view or make changes from there.

1. From the Landing Dashboard click "Questions Remaining".



2. Enter your search criteria and click "Search".

Course Search

Provider Number <input type="text"/>	Provider Name <input type="text"/>	FEIN: <input type="text"/>
Course Number <input type="text"/>	Course Name <input type="text"/>	
State Course Number <input type="text"/>	Course Group Select One ▾	Course Method Select One ▾
Application Date From: <input type="text"/>	Application Date To: <input type="text"/>	

3. Click on the item you wish to view/manage.

Show entries Filter:

License State <small>↑↓</small>	Course Number <small>↑↓</small>	State Course Number <small>↑↓</small>	Course Name <small>↑↓</small>	Course Group <small>↑↓</small>	Course Credits <small>↑↓</small>	Course Effective Date <small>↑↓</small>
Idaho	6000148243		TEST COURSE <small>←</small> Health		1-General	05/30/23