

SBS for Organizations
State Based Systems

State Services ▾ Go To Dashboard ▾

Add Entity Go To Add Entity

Add Licensee Add Provider Add Company Add Company EHR Add IRO

Report Generator Go To Report Generator

Create Report Retrieve Report Report Queue

License Administrators

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

Education Providers

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

Companies Go To Dashboard

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

Companies - External Healthcare Review (EHR)

External Healthcare Review Notifications User Settings

Independent Review Organization (IRO)

External Healthcare Review Notifications User Settings

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.

☰ State Services ▾ Go To Dashboard ▾

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

| | | |
|---|---|--|
| <input checked="" type="checkbox"/> Licensee Renewals | <input checked="" type="checkbox"/> Print Bulk Licenses | <input checked="" type="checkbox"/> Print Bulk Education Transcripts |
| <input checked="" type="checkbox"/> View Licensee Summary | <input checked="" type="checkbox"/> Print Bulk Summary | <input checked="" type="checkbox"/> Update Business Entity Contact Information |
| <input checked="" type="checkbox"/> Save Searches for Dashboard | <input checked="" type="checkbox"/> Notifications | <input checked="" type="checkbox"/> 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

| | | |
|---|--|--|
| <input checked="" type="checkbox"/> Provider and Course Renewals | <input checked="" type="checkbox"/> Course Roster Upload and Input | <input checked="" type="checkbox"/> Provider, Course and Instructor Applications |
| <input checked="" type="checkbox"/> View Provider Summary | <input checked="" type="checkbox"/> Update Provider Addresses and Contacts | <input checked="" type="checkbox"/> Attachments |
| <input checked="" type="checkbox"/> Provider and Course Summary Print | <input checked="" type="checkbox"/> Education Transcript Print | <input checked="" type="checkbox"/> Course Offerings |
| <input checked="" type="checkbox"/> Save Searches for Dashboard | <input checked="" type="checkbox"/> Notifications | <input checked="" type="checkbox"/> 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

| | | |
|---|---|---|
| <input checked="" type="checkbox"/> View Company Summary | <input checked="" type="checkbox"/> Update Company Addresses and Contacts | <input checked="" type="checkbox"/> Company Summary Print |
| <input checked="" type="checkbox"/> Save Searches for Dashboard | <input checked="" type="checkbox"/> Notifications | <input checked="" type="checkbox"/> 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)

| | | |
|--|---|---|
| <input checked="" type="checkbox"/> External Healthcare Review | <input checked="" type="checkbox"/> Notifications | <input checked="" type="checkbox"/> 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)

| | | |
|--|---|---|
| <input checked="" type="checkbox"/> External Healthcare Review | <input checked="" type="checkbox"/> Notifications | <input checked="" type="checkbox"/> 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 is open, showing a list of options: 'Licensee', 'Licensee File Upload', 'Provider', 'Company', 'IRO', and 'Company EHR'. The second menu is closed and shows 'Licensee' as the selected option.

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 dotted lines. Each screenshot shows the required fields and an 'Add to Cart' button. The 'Licensee' form includes fields for National Producer Number (NPN), License Number, Entity Type, Last Four Digits of SSN (SSN4), and Jurisdiction. The 'Provider' form includes fields for Provider Number, Jurisdiction, and PIN. The 'Company' form includes fields for Jurisdiction, FEIN, PIN, NAIC CoCode, and SBS Company Number. The 'IRO' form includes fields for IRO Number, PIN, and Jurisdiction. The 'Company External Health Review' form includes fields for Jurisdiction, 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, there is a header 'Add Entity Cart' and a dropdown arrow. Below the header, there is a 'Show' dropdown set to '10' and a 'Filter:' field. The main part of the interface is a table with the following columns: 'Type', 'Name', 'NPN', 'Last 4 Digits of SSN', 'CoCode', 'Last 4 Digits of FEIN', 'Count', 'Fees', and an empty column. There is one row in the table with the following data: 'Provider', 'DOI Test Provider', empty, empty, empty, empty, '(1)', '\$0.00', and a trash icon. Below the table, there is a 'Showing 1 to 1 of 1 entries' message and a 'Total Fees' of '\$0.00'. At the bottom, 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 that says: '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 the following columns: 'Jurisdiction', 'Provider Number', 'FEIN', 'Provider Type', and 'Provider Name'. There is one row in the table with the following data: 'Idaho', '500027342', empty, 'Association', and 'DOI Test Provider'. At the bottom right of the table, there is a 'Grand Total: \$0.00' label. Below the table, 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:', '* Billing ZIP Code:', and '* Amount:'. The right column includes: '* Card Holder Last Name:', '* Billing City:', '* Billing Country:', '* Email:', and '* Phone Number:'. The 'Amount' field is pre-filled with '\$172.50'. 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.

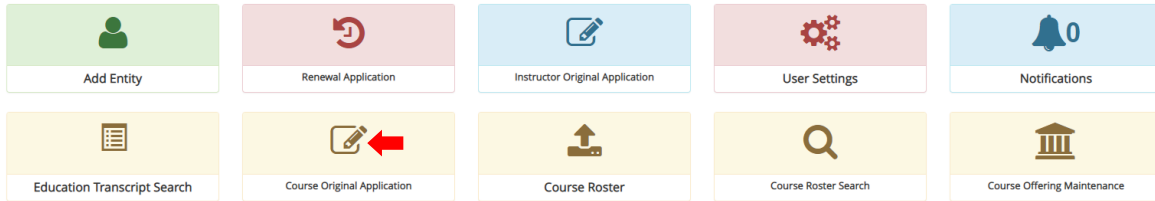
Course Roster Search: Search your previously submitted course rosters.

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

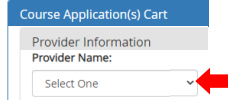
The Provider Matrix lists all Providers currently linked to your account.

How to submit a course application.

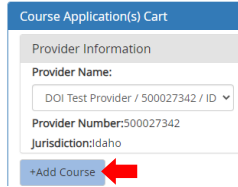
1. Click on "Course Original Application".



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 at the bottom right is highlighted with a red arrow.

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

Buttons: Previous, Next, Finish, Cancel

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

*Effective Date: 05/18/2023

Attachment Status: [Dropdown]

Buttons: Upload, Cancel

Attachments

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

Buttons: Previous, Next, Finish, Cancel



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 at the bottom right is highlighted with a red arrow.

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:

* Billing Street Name:

* Billing City:

* Billing State:


* Billing Country:

* Billing ZIP Code:

* Email:

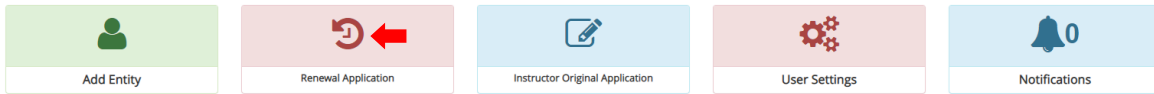
* Amount:

* Phone Number:

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 Cancel

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 Cancel

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

1 Education Renewal / 2 Review / 3 Payment Details

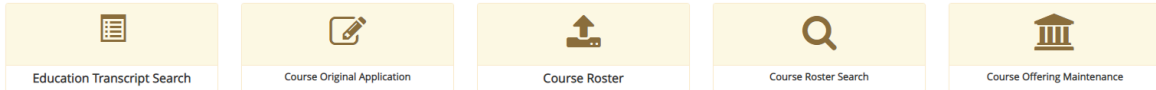
Payment Details

| | | | |
|---------------------------|---|--------------------------|--|
| * 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 Cancel

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.

The screenshot shows the 'Manual Roster' form with the following fields: Provider (dropdown), Course (dropdown), Date Taken, Last Name, NPN, and License Number. There are 'Add', 'Reset', and 'Cancel' buttons at the bottom. A red arrow points to the 'Add' button.

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

The screenshot shows the 'Course Roster Details' table with 3 entries. The table has columns for Select, Jurisdiction, Provider Number, Course Name, Course Number, NPN, License Number, Licensee Name, Is Resident?, Date Taken, and Credits Earned. A red arrow points to the 'Next' button at the bottom.

| 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 |

4. Verify the roster and click "Next".

The screenshot shows the 'Course Roster Details' table with 1 entry. The table has columns for Jurisdiction, Provider Name, Provider Number, Course Name, Course Number, Number of Attendees, and Fee Amount. A red arrow points to the 'Next' button at the bottom.

| 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 |

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

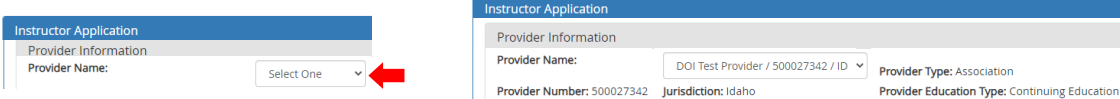
The screenshot shows the 'Payment Details' form with the following fields: Card Holder First Name, Card Holder Last Name, Billing Street Name, Billing City, Billing State, Billing Country, Billing ZIP Code, Email, Amount, and Phone Number. There are 'Previous', 'Next', 'Finish', and 'Cancel' buttons at the bottom. A red arrow points to the 'Finish' button.

How to submit an instructor.

1. Click on "Instructor Original Application"



2. Select the provider from the drop down list.



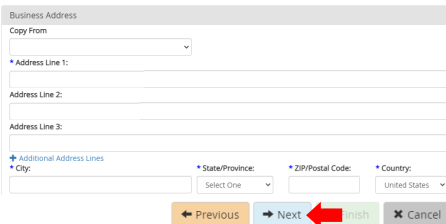
3. Click "Add Instructor".



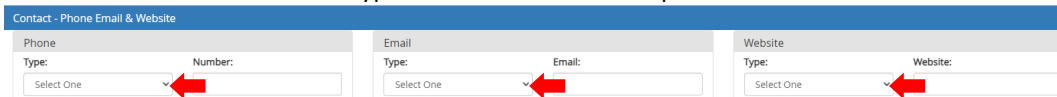
4. Enter the Instructor's information and click "Next".



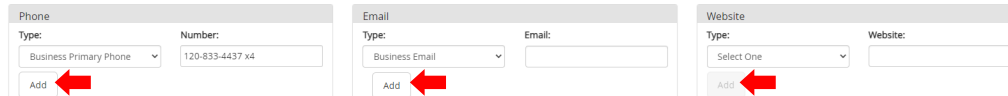
5. Enter the Instructor's information and click "Next".



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



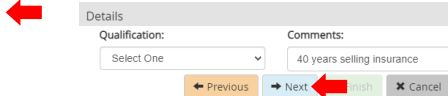
7. Enter the Instructor's information and click "Add".



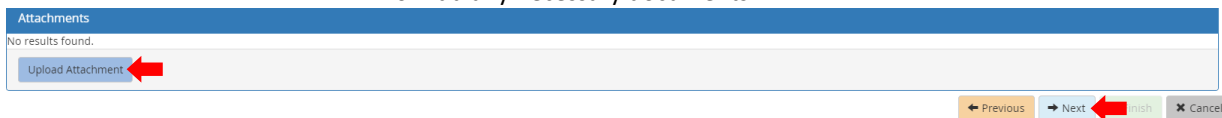
8. Click "Next".



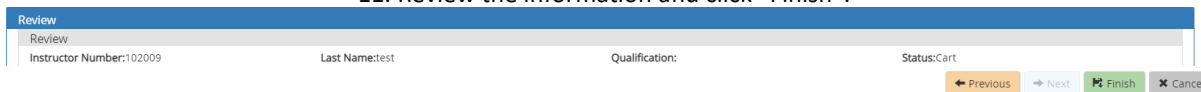
9. Enter the Instructor's qualification and click "Next".



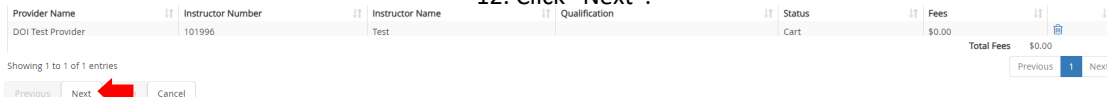
10. Add any necessary documents.



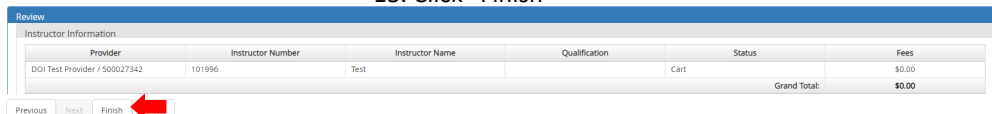
11. Review the information and click "Finish".



12. Click "Next".



13. Click "Finish".



Notifications.

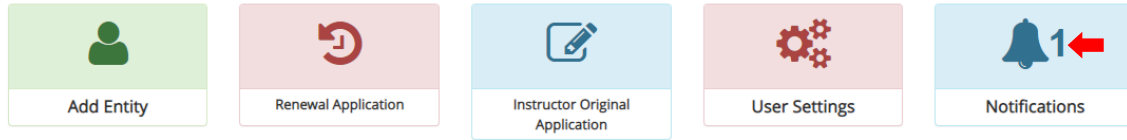
You can set up SBS to send you a notification if any of the following take place:

- 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.

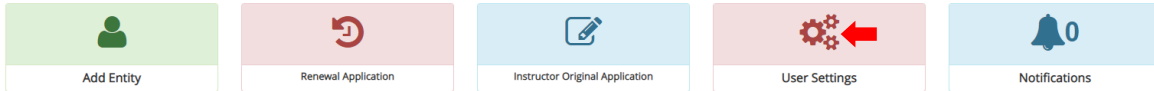
You can set up SBS to send you a notification with any of the following take place:

- 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 | | | |

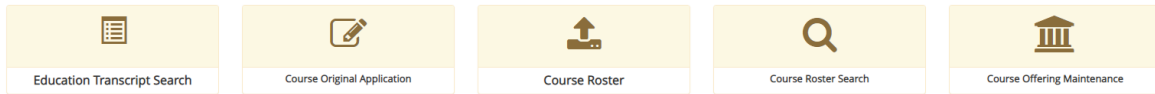
3. When all changes have been made click "Save".

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 |