

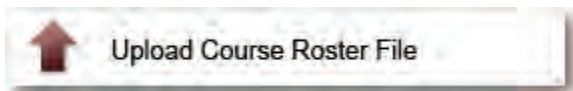
How to Report Continuing Education Course Credits to the Wisconsin Insurance Department

There are two methods of processing rosters, the File Transfer method—best for large volume rosters—and the Input Course Roster method, which works great for classes with smaller student participation, or for adding one or more students to an existing roster.

Both of the course roster processing methods happen in real time—no delay in posting. Go to https://sbs-wi.naic.org/Lion-Web/jsp/login/ext_provider_login.jsp. On the Welcome page, once you have logged in, is a link to the Users Guide. Use the page numbers listed here to find the complete instructions.

File Transfer

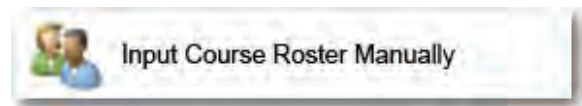
Use for larger course rosters, or to upload multiple course rosters in a single file.



- ☞ Create upload file, save as Plain Text (*.txt) format. *(page 18)*
- ☞ Login to SBS OnlineCE, using the URL above, and the User Name and Password assigned to you.
- ☞ Click Upload Course Roster File. *(page 23)*
- ☞ Click the Browse... button to locate the upload file. *(page 23)*
 - search for file as if opening a document.
 - select the file (click to highlight) and click Open.
- ☞ Click Submit button. *(page 24)*
- ☞ Roster(s) display in table form, and if any errors, correct them before proceeding. *(page 25)*
- ☞ Click Submit.
- ☞ Course Roster Fee Summary. *(page 27)*
 - summarizes uploaded file
 - begins fee payment, click Credit Card Details button. *(page 5)*
- ☞ Print transaction summary and receipt. *(page 28)*
- ☞ Go back to the Welcome page via the Home button.
- ☞ View/Print a report of the students/courses added in this session by clicking the View Attendance Roster menu item, enter the transaction ID, and click the Submit button. *(page 35)*

Input Course Roster

Use for small course rosters and for adding students to an existing roster.



- ☞ Login to SBS OnlineCE, using the URL above, and the User Name and Password assigned to you.
- ☞ Click Input Course Roster Manually. *(page 31)*
- ☞ Enter the course number (or search for it), enter the course completion date, and enter the number of attendees. *(page 31)*
- ☞ Click OK. *(page 32)*
- ☞ Input the student's License Number, National Producer Number, or Social Security Number. *(page 33)*
- ☞ Click Submit.
- ☞ Verify all data input on this summary screen, then click Edit to go back, or click Submit to continue. *(page 34)*
- ☞ Pay fees. *(page 5)*
- ☞ Print transaction summary and receipt. *(page 28-29)*
- ☞ On the Success Screen, click the Course Attendee Detail link to view/print a report of the students that have completed this course. *(page 35)*

If you have a question about this process, call the SBS Help Desk. The contact information is:

Phone: 816/783-8990
E-mail: sbshelp@naic.org