



Wisconsin Office of the Commissioner of Insurance

Melody Esquivel, Insurance Supervisor of Agent Licensing
Rebecca Rebholz, Bureau Director of Market Regulation

The Agent Licensing Department

Agent licensing is in charge of reviewing and issuing licenses to qualified individuals, providing oversight of the testing services, administration of prelicensing and continuing education programs, and assisting producers with licensing questions or concerns.

With a team of six, Wisconsin processed over 28,000 applications, 48,000 renewals, and over 36,000 appointments and terminations in 2016.

Wisconsin currently has over 147,000 licensed producers and entities.

OCI Staff Updates

Rebecca Rebholz became the new Bureau Director of Market Regulation in 2016 and replaced Cari Lee who is now OCI's Division Administrator.

Agent Licensing hired two new Consumer Protection Investigators; Erin Aussem and Kristi Prindle.

State Based Systems (SBS)

www.statebasedsystems.com

SBS allows providers to submit provider and course renewal applications through SBS electronically for state approval.

Upload Course Rosters for one or many courses in one transaction.

View your provider summary where you can update your address, phone number, and email addresses.

Providers can also manage contacts and add attachments.

Tips on Submitting New Courses

Ensure all information submitted is complete.

- Clear and detailed course description
- Course Outline (show clear and direct link to insurance)
- Complete Course Material

Provider & Course Denials

When a course or providers application is denied, the provider has the right to request a hearing. Providers will need to follow these steps.

- Call Prometric to discuss resolution. Provider has 30 days from denial to remedy.
- Written request for reconsideration to Prometric. Prometric will respond within 15 days of receipt.
- If denial remains, provider can request a formal hearing with OCI in writing.

Course Renewals

Notices are sent out 60 days prior to the renewal date for both CE and PE.

Prelicensing Course Renewals

Due August 30th of odd year (same date as prelicensing providership)

Continuing Education Course Renewals

Expires every 2 years at the end of month in which course was approved.

How Can Providers Help Students?

- Route students to the OCI Website for guidance and instruction.
- Email ociagentlicensing@wisconsin.gov
- Course completions and time frame expectations of when credits will be submitted to the state.
- National Producer Number - “Look up My National Producer Number (NPN)” on www.nipr.com.

How To Obtain A Producer License

- Review Wisconsin Licensing Handbook on oci.wi.gov
- Complete Prelicensing Education
- Fingerprinting through Fieldprint via www.fieldprint.com (major lines, title, credit, navigator). Fieldprint code: FPWIOCIINSURANCE
- Pass exam through Prometric. www.prometric.com/wisconsin
- Apply for the license via www.nipr.com.

How To Renew Producer License And Verify Educational Requirements

- Licenses expire every two years on the last day of the producer's birth month.
- Producers holding major lines are required to complete 24 credits of CE with 3 of those credits being ethics.
- Review & verify credits via www.statebasedsystems.com or oci.wi.gov
- Submit a renewal application and pay renewal fee via www.nipr.com
- Applications not deferred to OCI will process within 24 to 48 hours
- Currently, applications deferred to OCI will process within 2-3 weeks.

License Changes and Requests

All changes must be requested directly from the producer. Requests must include name, NPN, statement and effective date.

Changes in address, email, or phone should be reported to OCI within 30 days either through www.nipr.com or by email to ociagentlicensing@wisconsin.gov

Name changes can be emailed to ociagentlicensing@wisconsin.gov

Voluntary Surrenders, Letters of Clearance, and Letters of Certification can be requested by sending an email to ociagentlicensing@wisconsin.gov

Contact Information

Prometric

E-mail:
pro.ceservices@prometric.com

Phone: (866) 370-3411

- CE/PE Provider Apps & Renewals
- CE/PE Course App & Renewals
- Changes to Provider Info
- Credit Reporting
- Course Revisions
- Pass/Fail Reports

SBS

E-mail: sbshelp@naic.org

Phone: (816) 783-8990

- SBS system issues
- List of Approved Courses
- List of Approved Providers
- Maintain Provider Information

OCI- Agent Licensing

E-mail:
ociagentlicensing@wisconsin.gov

Phone: (608) 266-8699

- License Renewals
- Licensee Issues
- Provider Exceptions

Regulatory Updates

OCI has currently proposed to update outdated administrative rules, formalize new processes that were once paper and making them electronic, and consider other changes.

Some of those proposed changes include:

- Allowing PLE providers to provide a student with a hard copy or electronic copy of the certificate of completion.
- Repeal of s. Ins 26.07 (2), Wis. Adm. Code where providers are required to bank prelicensing within 10 days.
- Adding more CE course topics to the approve content under s. Ins 28.06 (6), Wis. Adm. Code.
- Changing examination scores from being valid from 30 days to 180 days for applicants.

Questions?