

## Pharmaceutical Sales Representative

# Education Provider Dashboard Functions

Website: [State Based Systems for Organizations](https://sbs.naic.org)

### For Providers

SBS for Organizations allows continuing education providers to complete original and renewal applications to become an approved CE provider, submit original and renewal courses for state approval, supply course rosters with program completion information, and view provider summary information. NOTE: This service replaces Online Continuing Education (OCE).

#### Submit Provider, Course and Instructor Applications

Apply for original and renewal provider, course and instructor applications across multiple jurisdictions in one transaction with a single login account.

#### Upload Course Rosters

Upload or input course roster data for one or many courses in one transaction.

#### View Provider Summary

Update provider address, phone number, email address and website. Manage provider contacts and add attachments.



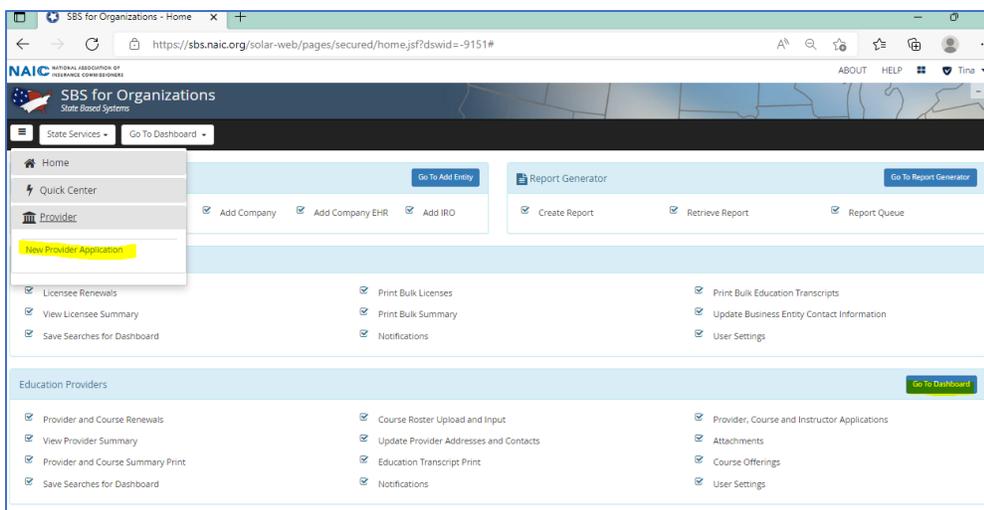
[Signup for SBS for Organizations >](#)

[Login >](#)

## 1. To begin, create login for SBS Organizations

## 2. New Provider Application

**NOTE \*\*\*** We have been receiving inquiries that the (Go to Dashboard) is not functioning properly and we are working on fixing the issue. Additional ways to reach the dashboard or new provider application is highlighted below. If there are continued difficulties please reach out to [help@niac.org](mailto:help@niac.org)



The screenshot shows the SBS for Organizations dashboard. The 'Provider' menu is open, and 'New Provider Application' is highlighted. The 'Go To Dashboard' button is highlighted in green. The dashboard includes sections for 'State Services', 'Report Generator', 'Education Providers', and 'Licensee Renewals'.

**\*\*\*\* NOTE\*\*\*\*** PSR's are responsible for obtaining both pre license education and continue education to reach compliance with Oregon laws starting with the 2023 renewals.

**For providers** to offer their courses for both education types and for our systems to recognize and distinguish the education types the provider must apply for two separate provider licenses.

One provider number will be for Continue education and the second will be for pre education.

(Although we are asking the provider to apply for two licenses, ultimately It will be the PSR's responsibility to check their education transcript and verify requirements or status.

**Getting Started:**

**Note: You Must fill in every section with a \***

Provider name, **Education Type: choose Continue education** Application date and Provider Type which will be either 1 or 2. *(for the second license, the identifying option will be in the jurisdiction section).*

1.Pharmaceutical Sales Representative CE Provider

**Note: The first provider license you apply for you can use the FEIN the second license leave the FEIN out or you will get an error.**

New Provider Application

\*Provider Name: PSR TEST

FEIN:

\*Education Type: Continuing Educati

\*Application Date: 06/10/2022

\*Provider Type: Pharmaceutical Sal

Have you ever been a Provider in this state?  
 Yes  No

Annual Fee Classification: Select One

**Next** Fill in Business Phone and E-mail. *(The business contact information is the information that will be posted on SBS for PSR's seeking education.)*

Phone, Email, Website

Phone

Type: Select One

Number:

Add

Type	Number		
Business Primary Phone	555-555-5555		

Email

Type: Select One

Email:

Add

Type	Email		
Business Email	christina.m.boone@dcb.s.oregon.gov		

Website

Type: Select One

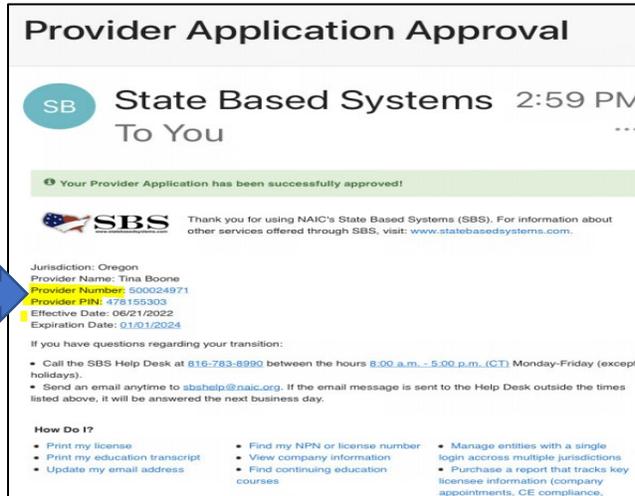
Add

Previous Next Finish Cancel

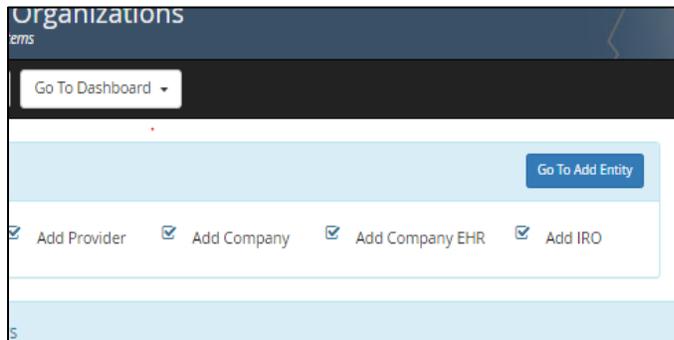


### 3. Receipt

Once the Division approved the provider application the approval e-mail pictured below will be sent. (The Provider number and Provider Pin are important numbers to keep on file.)



**NOTE:** To Begin #4 if you cannot pull down the education dashboard you must first go to add entity.



### 4. Course Original Application

This function is used to submit a new course(s) to the state to be approved as a course that the provider can offer. The provider will select what provider ship of theirs the course is for and then select the button that says “Add Course”.

**Again please note: You will need to apply for the same course 2X one for each provider license.**

**Tip: You could make the pre license more identifiable by adding PL in from of the name of the course.**

**Course Application(s) Cart**

Provider Information

Provider Name: Tina Boone / 500024971 / OR

Provider Number: 500024971  
Jurisdiction: Oregon

Provider FEIN:  
Provider Status: Approved

Provider Type: Pharmaceutical Sales Representative CE Provider  
Provider Education Type: Continuing Education

+Add Course

Previous Next Finish Cancel

The course description has to be less than 250 characters or they won't be able to continue in the process. **Please name ALL courses starting with PSR (name of course)**  
**Example: PSR Clinical Trial Design**

**New Course Application**

Course Information

\*Course Title:

Education Type: Continuing Education

National Insurance Designation:  Yes  No

Professional Designation:  Yes  No

Populate from User Account

Submitter Name (if different from provider contact):

Course Description:

\*Is this Course open to the Public?  Yes  No

Difficulty:

Measurement used for successful completions:

Word Count:

Home State:

Provider Home State ID:

Submitter Phone Number:

Submitter Email Address:

**Edits By Jurisdiction**

Oregon

\*Course Method:

\*Course Group:

\*General:

Optional Exam?

Previous Next Finish Cancel

Attachments are required for this portion. The attachment must include a timed outline with a minimum of 50 minutes per requested hour. *Oregon does not allow partial credits.*

**Upload Attachment**

**\*Attachment:**

+ File Upload

time eval.xlsx

**\*Attachment Description:**

Timed Outline

242 characters remaining.

**\*Effective Date:**

06/22/2022

**Attachment Status:**

▼

Upload
Cancel

← Previous
→ Next
Finish
✕ Cancel

You Must click upload after you attach a file, then hit next.

**Provider Information**

Provider Name: Tina Boone	Provider Type: Pharmaceutical Sales Representative CE Provider
Provider Number: 500024971	Provider FEIN:
	Provider Education Type: Continuing Education

**Course Information**

Course Title: Pharmaceutical 101	Is this Course open to the Public?: Y	Word Count:
Education Type: Continuing Education	Difficulty: Basic	Home State:
Professional Designation: N	Measurement used for successful completions:	Provider Home State ID:
Submitter Name (if different from provider contact):	Submitter Phone Number:	Submitter Email Address:

Oregon

Course Method: Online	Course Group: Pharmaceutical Sales Representative	General: 1
		Optional Exam? <input type="checkbox"/>

← Previous
→ Next
Finish
✕ Cancel

Review the information for this course and select "Finish".

This is what the screen looks like after finishing one course entry. If a provider has additional courses to submit, they can do that here by clicking add course otherwise, select next

**Course Application(s) Cart**

**Provider Information**

Provider Name: Tina Boone / 500024971 / OR  
 Provider Number: 500024971  
 Jurisdiction: Oregon  
 Provider FEIN: Provider Status: Approved  
 Provider Type: Pharmaceutical Sales Representative CE Provider  
 Provider Education Type: Continuing Education

**+Add Course**

Show 10 entries Filter:

Course Name	Provider Name	Provider Number	Jurisdiction(s)	Fees
Pharmaceutical 101	Tina Boone	500024971	Oregon	\$0.00

Total Fees \$0.00

Showing 1 to 1 of 1 entries

Previous 1 Next

NAIC Central Office Address Service Desk

This is a final review screen for all of the courses being submitted.

1 Application / 2 Review

**Review**

**Course Information**

Jurisdiction	Provider	Course Name	Education Type	Course Method	Course Group	Course Credits	Fees
Oregon	Tina Boone / 500024971	Pharmaceutical 101	Continuing Education	Online	Pharmaceutical Sales Representative	General: 1	\$0.00
Grand Total:							\$0.00

Previous Next Finish Cancel

NAIC Central Office Address Service Desk  
 NAIC Executive Office  
 Capital Markets & Investment Analysis Office

1100 Walnut Street Suite 1500 Kansas City, MO 64106-2197  
 (816) 783-8500 8 a.m. to 4 p.m. (CT) Monday - Friday

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## Receipt.

Thank you for using NAIC's State Based Systems (SBS). For information about other services offered through SBS, visit: [www.statebasedsystems.com](http://www.statebasedsystems.com).

**Payment Information**

Transaction Type: Course Application Transaction Date: 06/22/2022 Amount Paid: \$0.00

Jurisdiction	Provider	Course Name	Education Type	Course Method	Course Group	Course Credits	Fees
Oregon	Tina Boone / 500024971	Pharmaceutical 101	Continuing Education	Online	Pharmaceutical Sales Representative	General: 1	\$0.00
Grand Total:							\$0.00

Note: All fees will appear as a charge from NAIC State Based Systems on your monthly credit card statement.

If you have questions regarding your transaction:

- Call the SBS Help Desk at 816-783-8990 between the hours 8:00 a.m. - 5:00 p.m. (CT) Monday-Friday (except holidays)
- Send an email anytime to [sbs@naic.org](mailto:sbs@naic.org). If one email message is sent to the Help Desk outside the time above, it will be answered the next business day.

NAIC Central Office Address Service Desk  
 NAIC Executive Office  
 Capital Markets & Investment Analysis Office

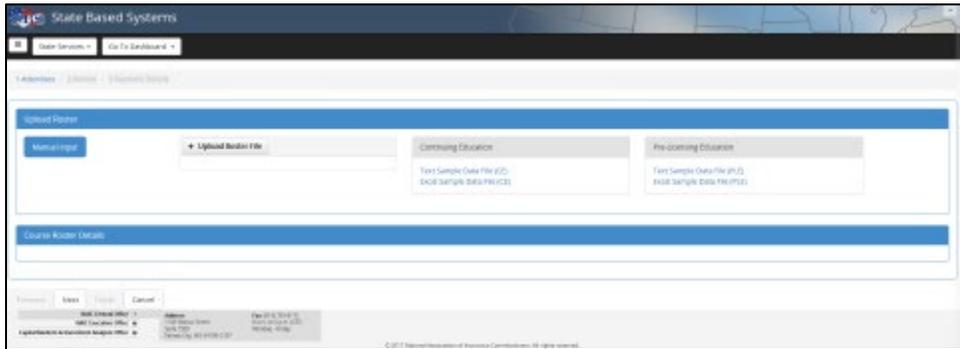
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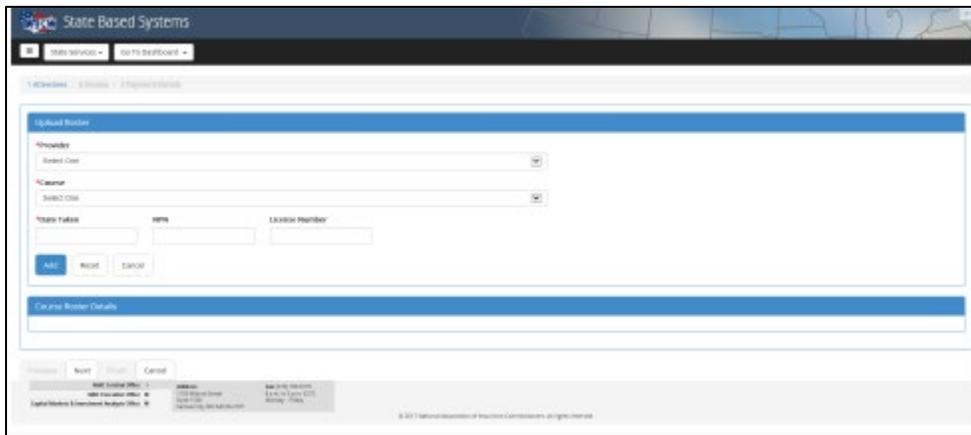
## 5. Course Roster Upload

This function is used to give credits to an Pharmaceutical Sales Representative or class of agents for a course they took from the provider. This can be done manually or by uploading a file with the

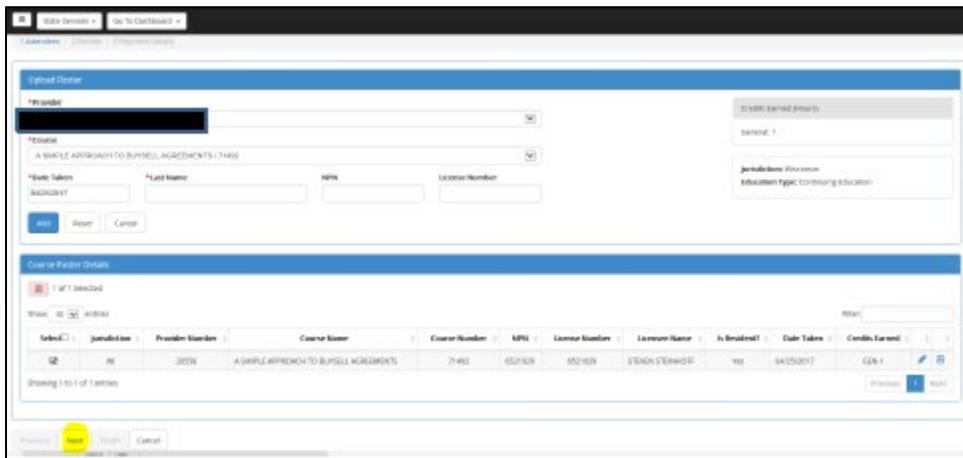
insurance agent(s). The proper formatting for the file upload option can be found in the examples on the right hand side. We'll be looking at the manual roster upload here. Select "Manual Input".



Fill out the information on this screen.



Select the box to be check-marked for Pharmaceutical Sales Representative under the column titled "Select". Then select the button that says "Next" in the bottom left-hand corner. Please notice that that are two different locations where "Next" can be selected. Only one works and the other may be removed or utilized in a future build.



Again, select the proper “Next” button in the bottom left-hand corner.

Jurisdiction	Provider Number	Course Name	Course Number	NIN	License Number	License Name	Is Boardset	Date Valid	Credit Earned
IN	3038	# 387PL APPROACH TO REVEILL AGREEMENTS	7180	4321201	387-028	STEVEN KOSKOFF	Yes	3/3/2021	CEU

Put in the payment information.

\* Card Holder First Name: Steve  
\* Card Holder Last Name: Stevens  
Billing Street Name: 3034 St  
Billing State: IN  
Billing ZIP Code: 46111-1111  
Billing City: Indianapolis  
Billing Country: IN  
E-mail: steve@statebased.com  
Phone Number: 317-411-1111

After this screen, the provider will know that’s the payment is successful because they will get a transaction number like most other processes.

Pay with PayPal  
The faster, safer way to pay  
Pay with credit or debit card  
Card number  
Expiration date: MM/YY  
CVC  
Pay Now

## 6. Course Roster Search

function is used to search if credits were successfully uploaded for a course that was taught previously by the provider.

The screenshot shows the 'Course Roster Search' interface. It includes several input fields: 'Provider' (dropdown), 'Course' (dropdown), 'Taken Date From' and 'Taken Date To' (text boxes), 'Banked Date From' and 'Banked Date To' (text boxes), 'Payment Authorization Number' (text box), 'Course Strng' (list box with options like 'ACCREDIT & REGIST', 'ANNUAL SUSPENSE', etc.), and 'Course Method' (list box with options like 'CLASSROOM', 'Self Study - Correspondence', etc.). There are 'Search' and 'Reset' buttons at the bottom left.

This information that appears below is as specific as the information gets.

The screenshot shows the search results for the 'Course Roster Search'. The search criteria are filled in, and the results table is displayed. The table has columns for 'Provider', 'Payment Authorization Number', 'Provider Number', 'Course Number', 'Course Strng', 'Course Method', 'NPN', 'License Number', 'License State', 'Taken Date', and 'Banked Date'. One result is shown for 'Arkansas' with course number '7100' and course strng 'A SIMPLE APPROACH TO NEWELL AGREEMENTS'. Below the table, there is a 'Showing 1 of 1 records' message and a 'Print' button.

## 7. Education Transcript Search

This tool is used so that providers can look up the transcripts of any students that have taken their course. All they need is the NPN#. Every licensed Oregon Pharmaceutical Sales Representative is assigned a NPN#.

The screenshot shows the 'Education Transcript Search' interface. It includes two input fields: 'Jurisdiction' (dropdown) and 'NPN#' (text box). There are 'Search' and 'Reset' buttons at the bottom left. The footer contains contact information for the NAC Central Office, NAC Executive Office, and Capital Markets & Investment Analysis Office, along with the address and phone number.

This is the exact same screen that we see when we look up an analyst and select “View Education Transcript”. The provider, just like us, can see courses for an agent from the agent’s previous compliance period by clicking on the blue hyperlink of the previous compliance period in the left-hand corner (in this example it is “Producer-Previous CE Compliance Period 12/18/2008-12/17/2014” that need to be selected).

ARKANSAS  
INSURANCE DEPARTMENT  
EDUCATION TRANSCRIPT

LICENSE NUMBER  
NATIONAL PRODUCER NUMBER (NPN)

LICENSE DETAILS

Type	Authority	Status	Expiration Date	Compliance Period	CE Compliant	Compliance Date	Credits Required	Credits Earned	Carryover	Credits Needed For Renewal
Producer	Property, Credit, Casualty	Active	12/17/18	12/18/15 - 12/17/18	Yes	12/18/16	0 Ethics, 21 General,	0 Ethics, 0 General,	0 General,	0 Ethics, 21 General,

CONTINUING EDUCATION COURSE COMPLETIONS

[Producer - Previous CE Compliance Period: 12/18/2008 - 12/17/2014](#)

PRELICENSING EDUCATION COURSE COMPLETIONS

Date Taken	Course Group	Course Method	Course	Provider	Total Credits	Course Credits	Date Banked
Total Credits							

## 8. Course Offering Maintenance

This function allows for a provider to offer one of their courses on a specific date. The provider can be as specific as they want with their course search. However, I highly recommend the provider searches only by their provider number. Broader is generally better. They’ll then need to click on the blue hyperlink of the course name that they need to do a course offering for.

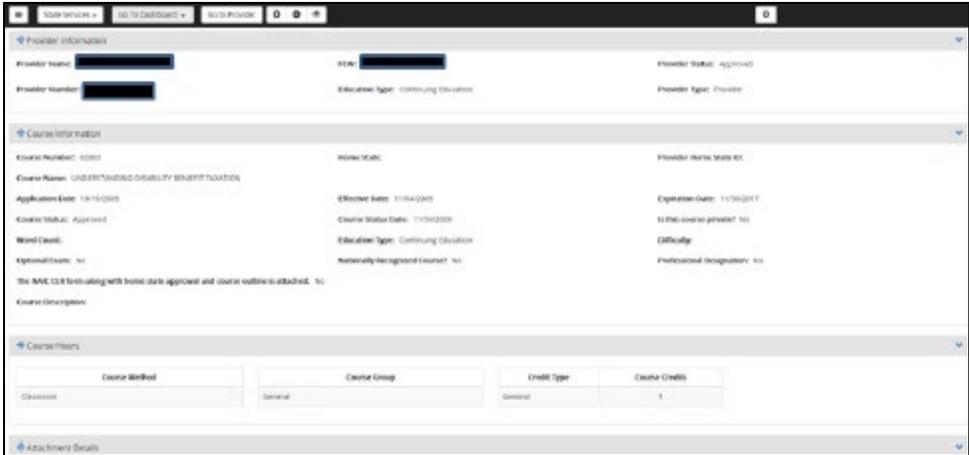
Course Search

Provider Number: 2800  
 Course Number:  
 State Course Number:  
 Application State From:  
 Provider Name:  
 Course Name:  
 Course Group:  
 Course Method:  
 Application Date To:

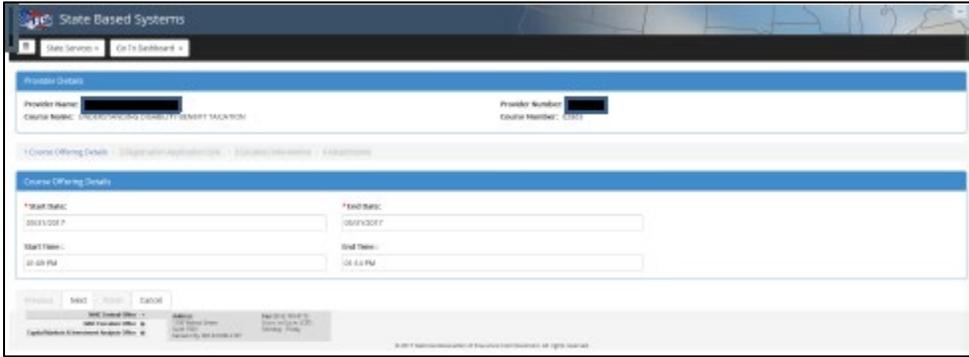
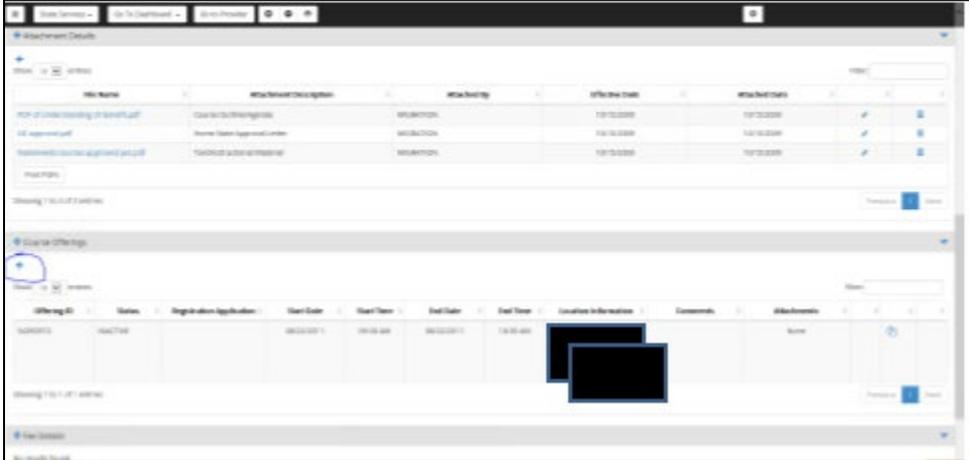
Search [X] Reset

License State	Course Number	State Course Number	Course Name	Course Group	Course Credits
Missouri	6293		UNDERSTANDING DISABILITY BENEFIT DETERMINATION	General	1-General
Missouri	6779		UNDERSTANDING LONG TERM DISABILITY LTD	ACCIDENT & HEALTH	2-General
Missouri	69126		SURVIVING CRITICAL INCIDENTS	ACCIDENT & HEALTH	2-General
Missouri	70013		RESPONSIBILITIES OF ETHICS	ETHICS	3-ETHICS, 8-General
Missouri	71281		BUILD A STRONG BOND OF BUSINESS WITH FEMALE CLIENTS	Life	1-General
Missouri	71402		A SIMPLE APPROACH TO UNDERSTANDING LIFE INSURANCE	Life	1-General
Missouri	71284		CONCEPTS WITH INSURANCE	Life	1-General
Missouri	131181		Preparing the Center for a Small Business Transfer	Life	2-General
Missouri	131186		Insurance Industry Ethics	ETHICS	3-ETHICS

Scroll Down.



This is a continuation of the previous screenshot. The provider will need to select the “+” button underneath “Course Offerings”. If it isn’t appearing for this course, then please have them clear their cache and try it in a different browser.



The provider can input a link to register for the course from their website. Please note that NAIC doesn’t verify if these links are broken or working.



No results found.

Course Offerings

Offering ID	Status	Registration Application	Start Date	Start Time	End Date	End Time	Location Information	Comments	Attachments
46880042	ACTIVE	Course Registration for DNR'S COURSE	05/11/2017	07:00 PM	05/11/2017	07:14 PM			None
46880043	Awaiting		08/22/2017	09:00 AM	08/22/2017	09:30 AM	Flight Compensator of 90 L2016 May/June Book, Suite 300 WISCONSIN, WISCONSIN 53238		None

Showing 1 to 2 of 2 entries

Page 1 of 1

Fee Details

No results found.

## 9. Renewal Application

Renewal Applications are to renew either your provider license or your courses.

\*Only items that are close renewing will appear and usually within a month or two prior to the expiration.

State Based Systems

State Services - Go To Dashboard

1 Education Renewal - 2 Review

Renew	Provider Number	Provider Name	Jurisdiction	Expiration Date	Renew Course(s)	Annual Course Fee Type	Course Fee	Total Fee
No renewal	20558	[REDACTED]	Wisconsin	07/31/2018	Select courses	Per Course Fee	\$0.00	\$0.00
No renewal	72	[REDACTED]	Montana	12/31/2017	Select courses	Per Course Fee	\$0.00	\$0.00
Grand Total:								\$0.00

Previous Next Finish Cancel

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State Based Systems

State Services - Go To Dashboard

1 Education Renewal - 2 Review

Renew	Provider Number	Provider Name	Jurisdiction	Expiration Date	Renew Course(s)	Annual Course Fee Type	Course Fee	Total Fee
Course Only Renewal	20558	[REDACTED]	Wisconsin	07/31/2018	Select courses	Per Course Fee	\$0.00	\$0.00
No renewal	72	[REDACTED]	Montana	12/31/2017	Select courses	Per Course Fee	\$0.00	\$0.00
Grand Total:								\$0.00

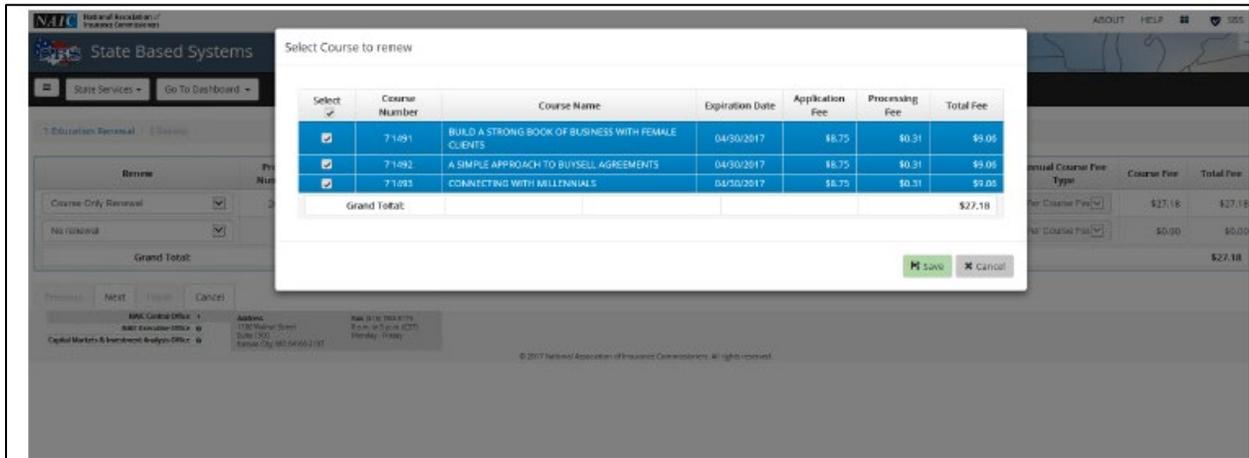
Previous Next Finish Cancel

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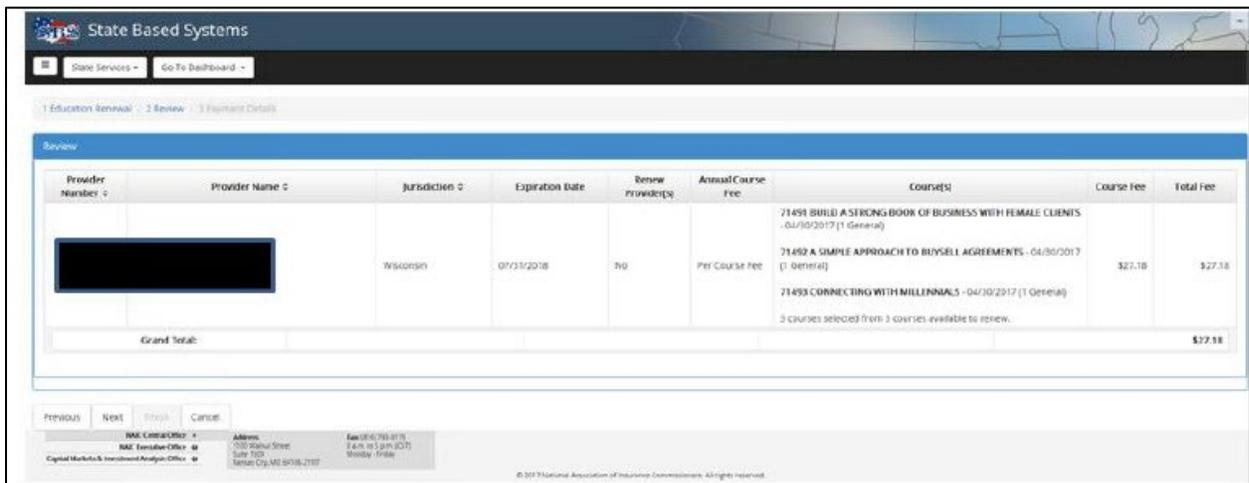
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The option "Provider Only Renewal" will be able to be selected if the providership is close to expiring. If it's not, then the option won't appear at all. The same is true for course renewal.

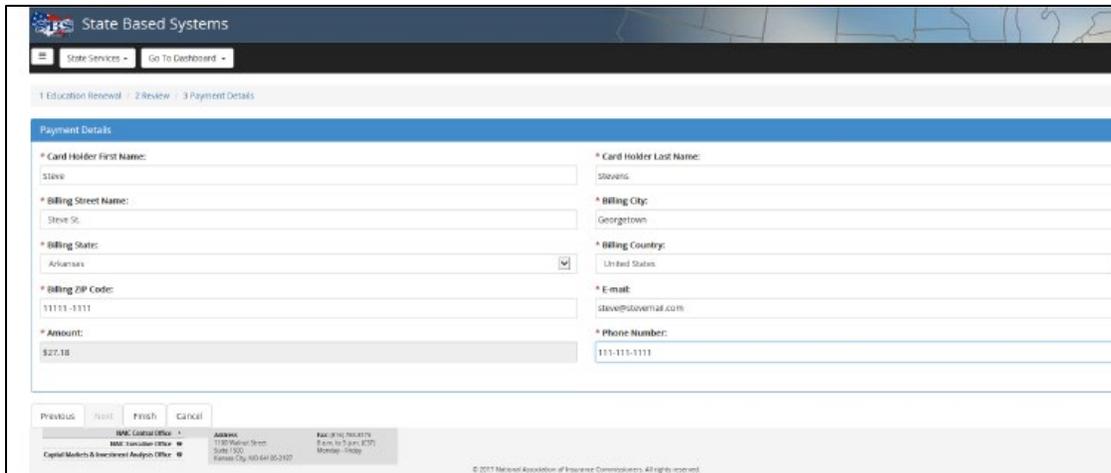
Providers are able to select any or all of the courses that they'd like to renew.



Select Save & Next.

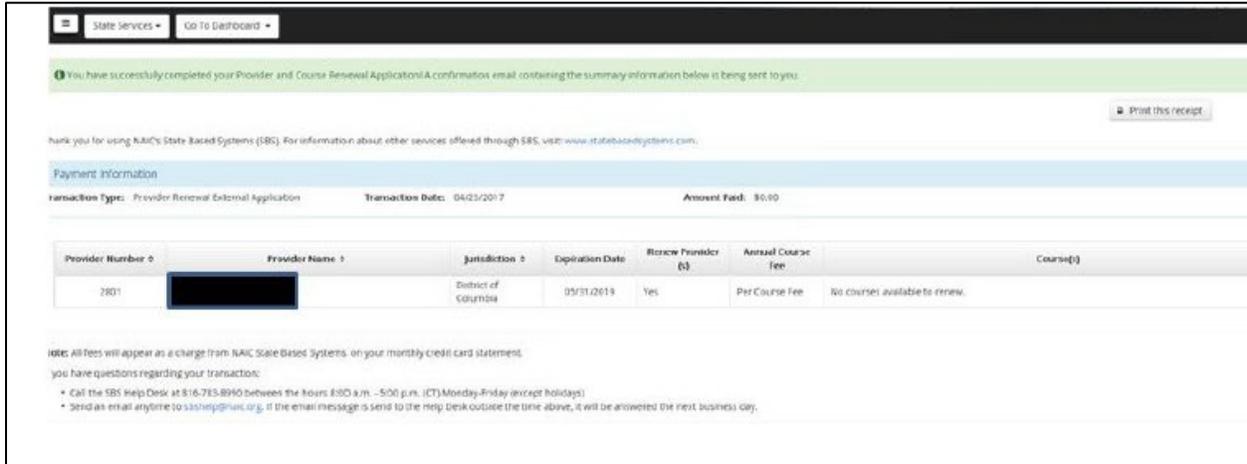


Select Finish



This is what the confirmation screen looks like. If you didn't get this screen, then you may have skipped a section, click previous and then proceed.

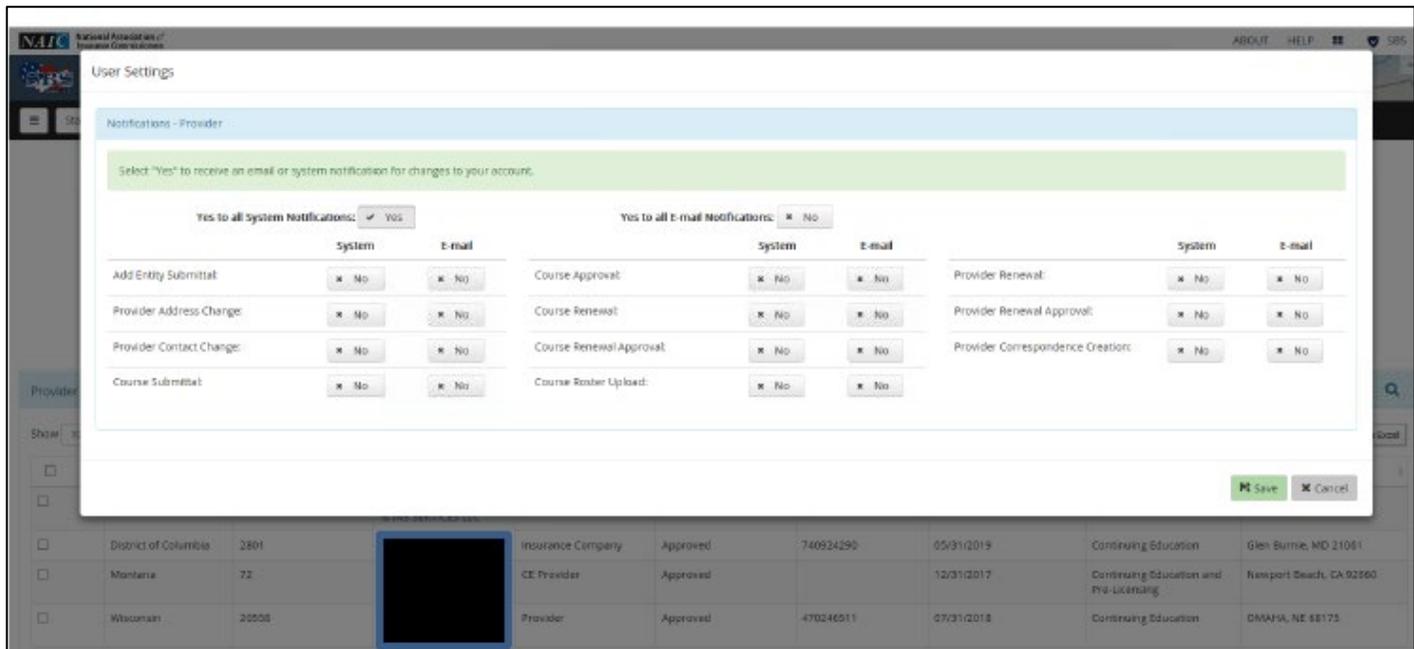
Verification in the form of a transaction number will appear on the screen if the process was successfully completed. Original applications and renewals are \$0



## 10. User Settings

These are all of the options that a provider has when they select "User Settings". It's primarily used to edit the notification settings for their account.

Note: I suggest you mark yes for all system and e-mail notifications.



This is the only way a provider is notified when a course or provider license is up for renewal.

440-5781 (7/22/COM)