Pharmaceutical Sales Representative

Education Provider Dashboard Functions

Website: State Based Systems for Organizations

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

**** 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 <u>Continue education</u> and the second will be for <u>pre education.</u>

(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 <u>Continue education</u>** 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.

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*.)

Business Address

Copy From

Address Line 1:

350 Winter St NE

Address Line 2:

Address Line 3:

➕ Additional Address Lines .

City: Salem State/Province: Oregon ZIP/Postal Code: 97301 Country: United States

Mailing Address

Copy From

Business Address

Address Line 1:

350 Winter St NE

Address Line 2:

Primary Contact

Salutation: Ms. First Name: Tina Middle Name: *Last Name: Boone Suffix: *Contact Type: Provider Represent

Pull data from Provider

Business Address

Copy From

Fee is $0. Click next.
Attachments are not for a new provider license but if you have a business license or any thing you would like attached to your provider license you can attach here then click next.

Click Finish.

State Based Systems

☰

1 Application / 2 Provider Phone, Email, Website / 3 Con

Confirmation

Provider Name: PSR TEST

Previous | Next | Finish | Cancel

NAIC Central Office ▸ Address
NAIC Executive Office ❷ 1100 Walnut Street
Capital Markets & Investment Analysis Office ❷ Suite 1500
Kansas City, MO 6410

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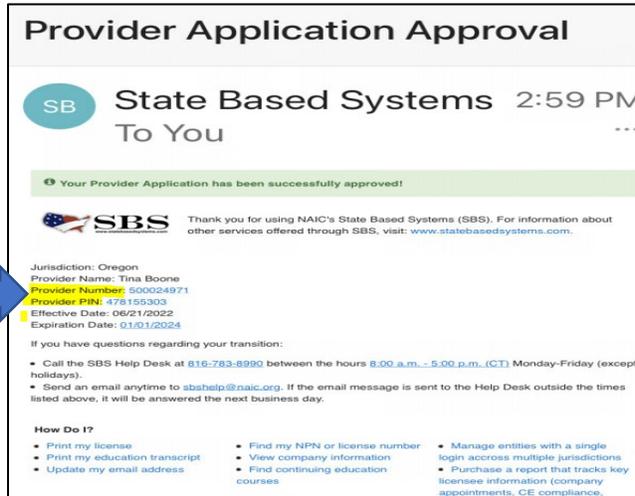
NOTE: To Begin #4 if you cannot pull down the education dashboard you must first go to add entity.
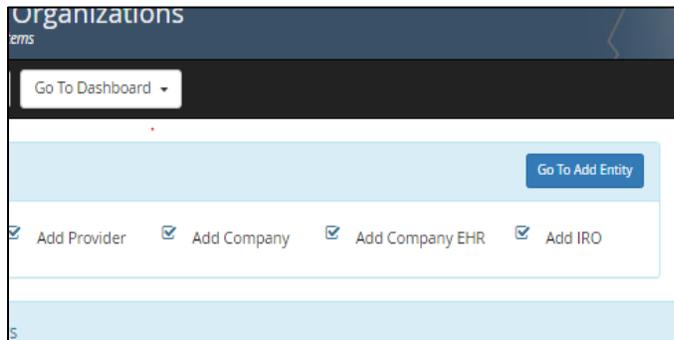
4. Course Original Application

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 Type:Pharmaceutical Sales Representative CE Provider

Provider Number:500024971

Provider FEIN:

Provider Education Type:Continuing Education

Jurisdiction:Oregon

Provider Status:Approved

+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:

*Is this Course open to the Public?
◉Yes ◯No

Word Count:

Education Type:Continuing Education

Difficulty:
Select One

Home State:
Select One

National Insurance Designation:
◯Yes ◉No

Provider Home State ID:

Professional Designation
◯Yes ◉No

Measurement used for successful completions:
Select One

Populate from User Account
Submitter Name (if different from provider contact):

Submitter Phone Number:

Submitter Email Address:

Course Description:

Edits By Jurisdiction

Oregon

*Course Method:
Other
Academic Credit Course
Independent Study
Classroom
Online

*Course Group:
Miscellaneous
Oregon Law
Pharmaceutical Sales Representative
Property and Casualty

*General: 1

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? ☐

[← 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

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

Receipt.

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".
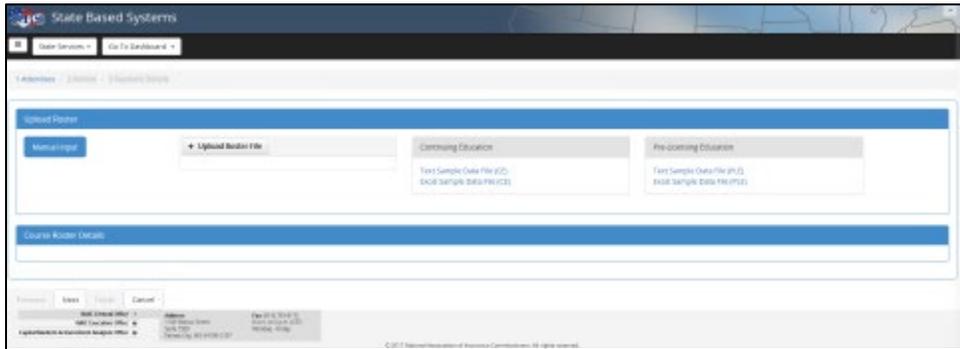
Fill out the information on this screen.
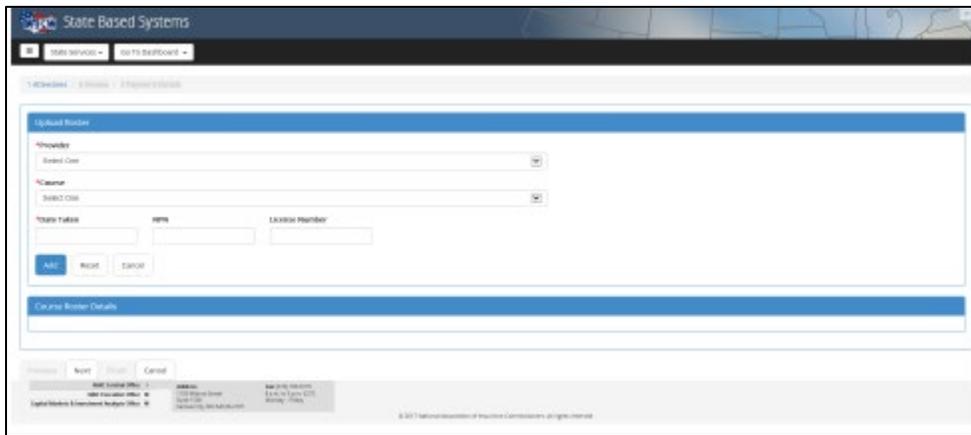
Select the box to be check-marked for Pharmaceutical Sales Representative under the column titled "Select". Then select the button that says "Next" in the bottom left-hand corner. Please notice that that are two different locations where "Next" can be selected. Only one works and the other may be removed or utilized in a future build.
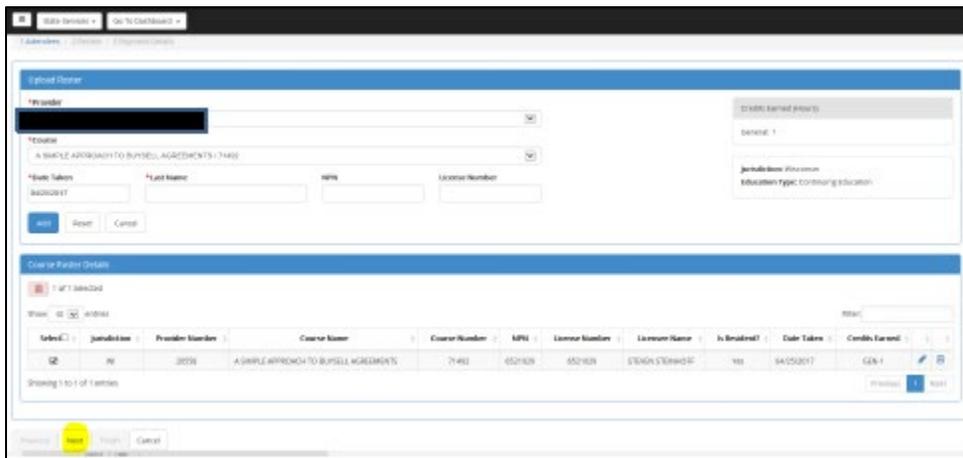
Again, select the proper "Next" button in the bottom left-hand corner.
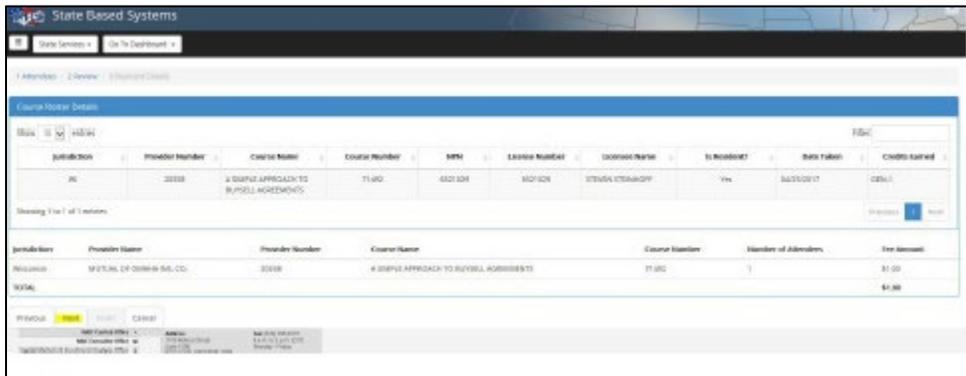
Put in the payment information.
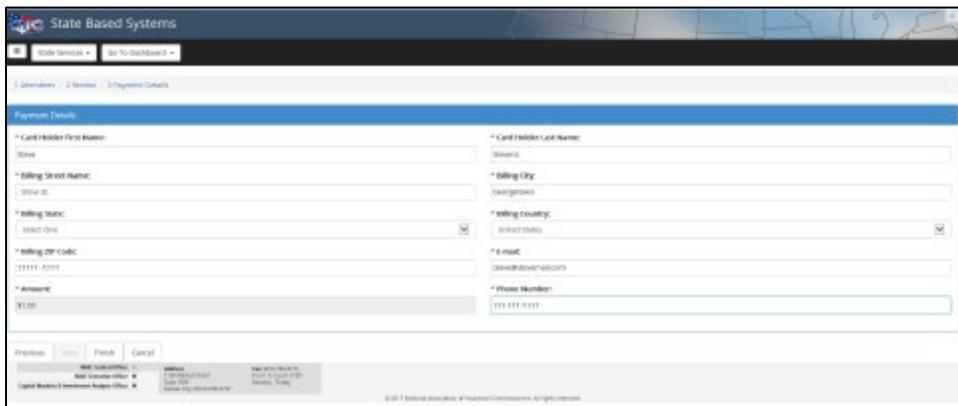
After this screen, the provider will know that's the payment is successful because they will get a transaction number like most other processes.
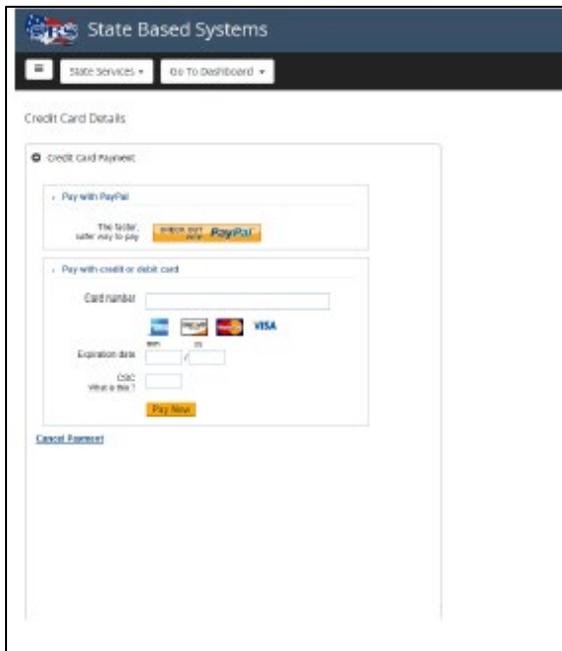
6. Course Roster Search

function is used to search if credits were successfully uploaded for a course that was taught previously by the provider.
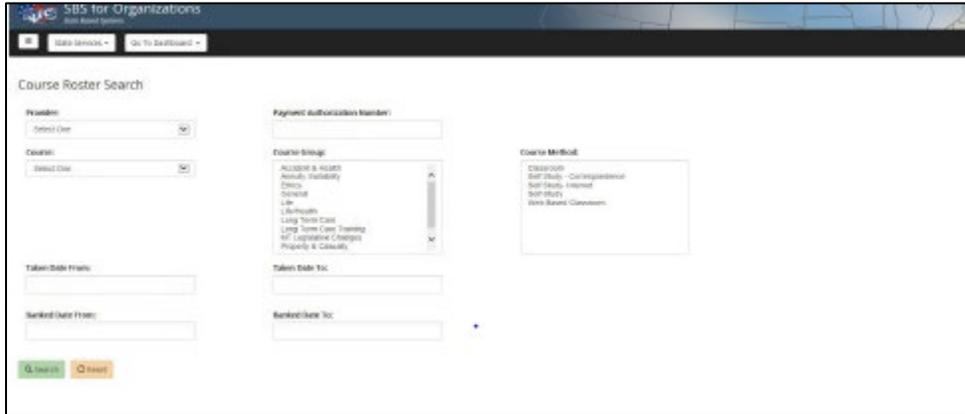
This information that appears below is as specific as the information gets.

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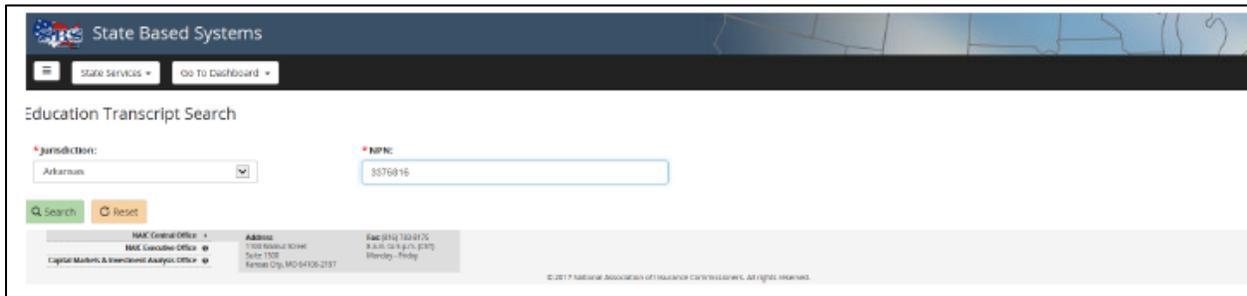
This is the exact same screen that we see when we look up an analyst and select "View Education Transcript". The provider, just like us, can see courses for an agent from the agent's previous compliance period by clicking on the blue hyperlink of the previous compliance period in the left-hand corner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

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.

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.
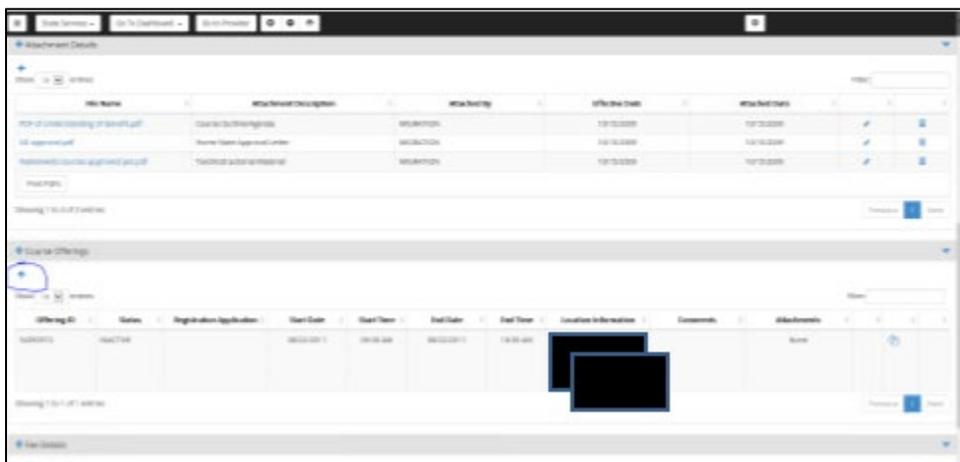
The provider can input a link to register for the course from their website. Please note that NAIC doesn't verify if these links are broken or working.
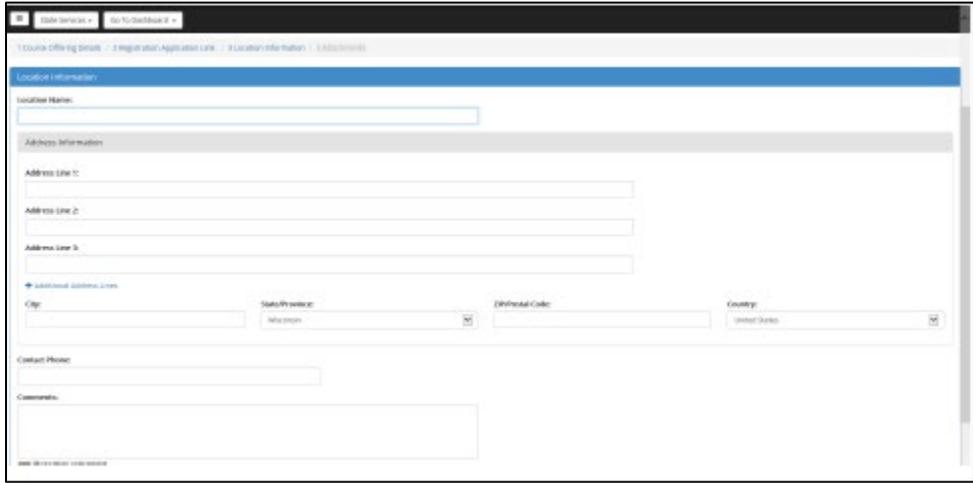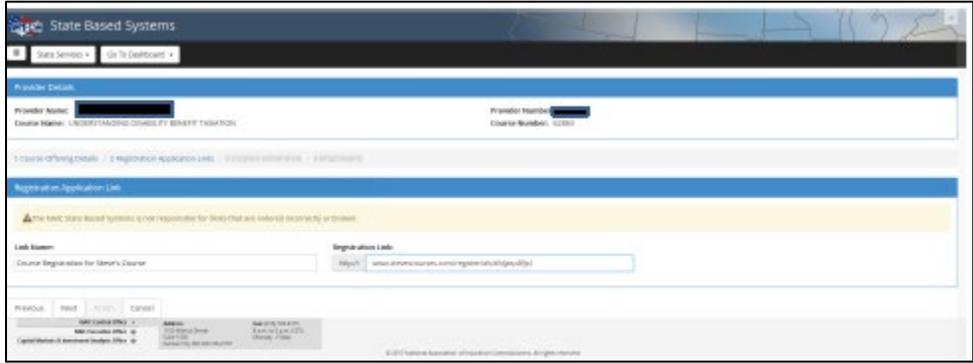
Attachments are not required.
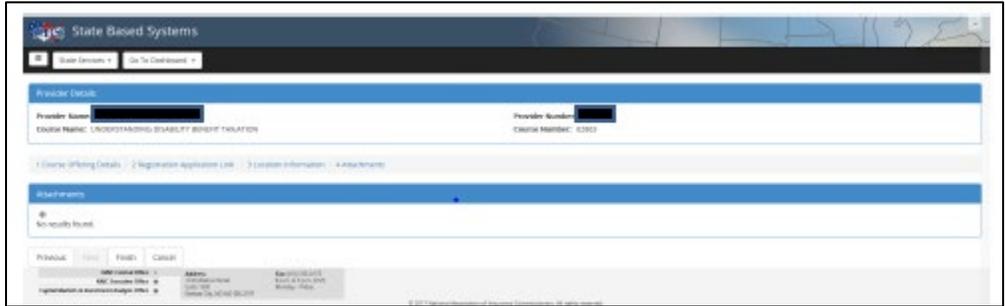
The provider should now see the new course offering underneath the section titled "Course Offerings".

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.

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.
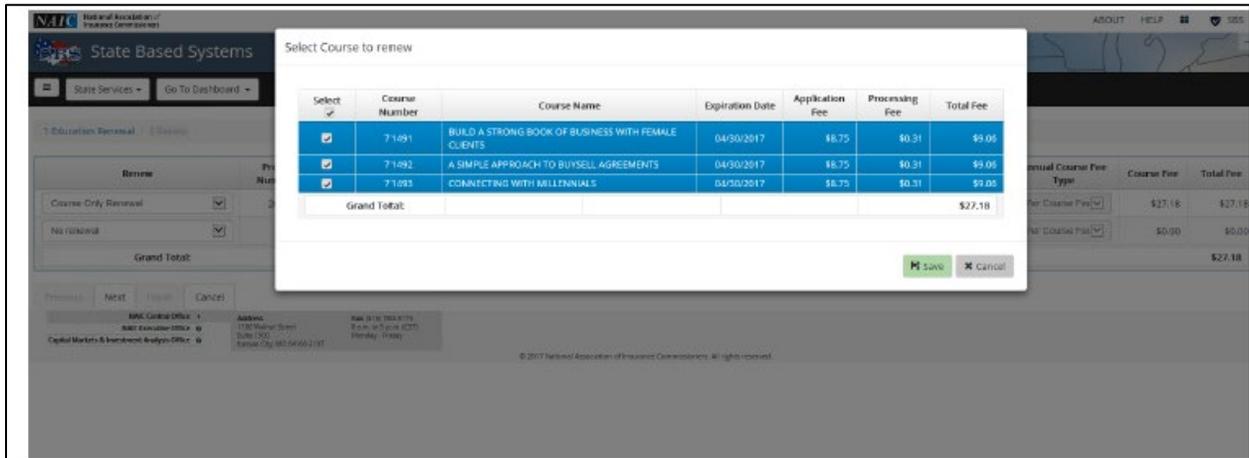

Select Save & Next.
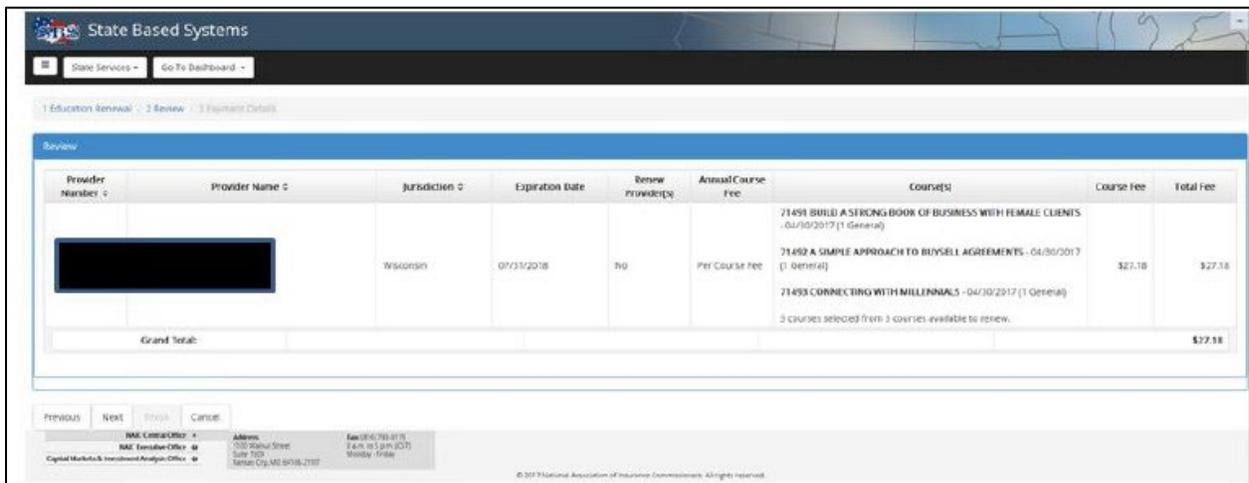
Select Finish
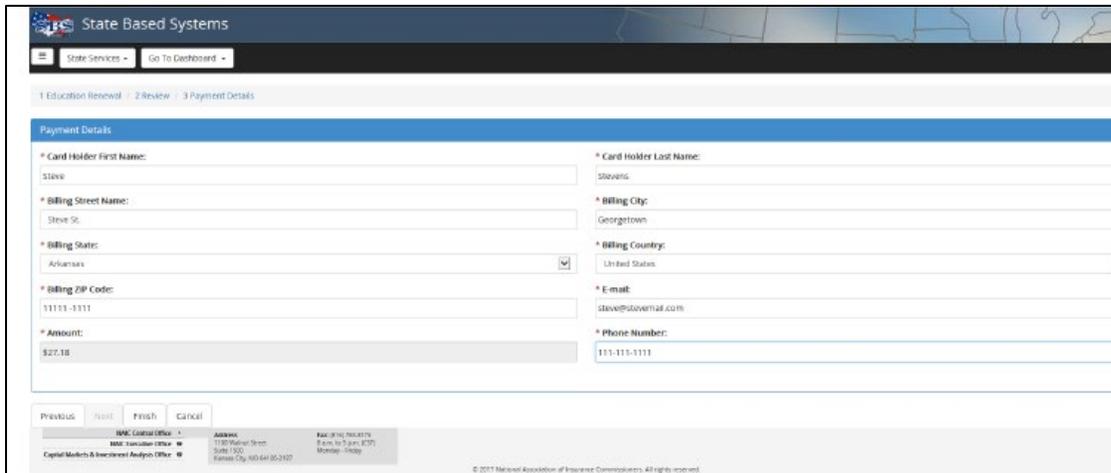
This is what the confirmation screen looks like. If you didn't get this screen, then you may have skipped a section, click previous and then proceed.

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
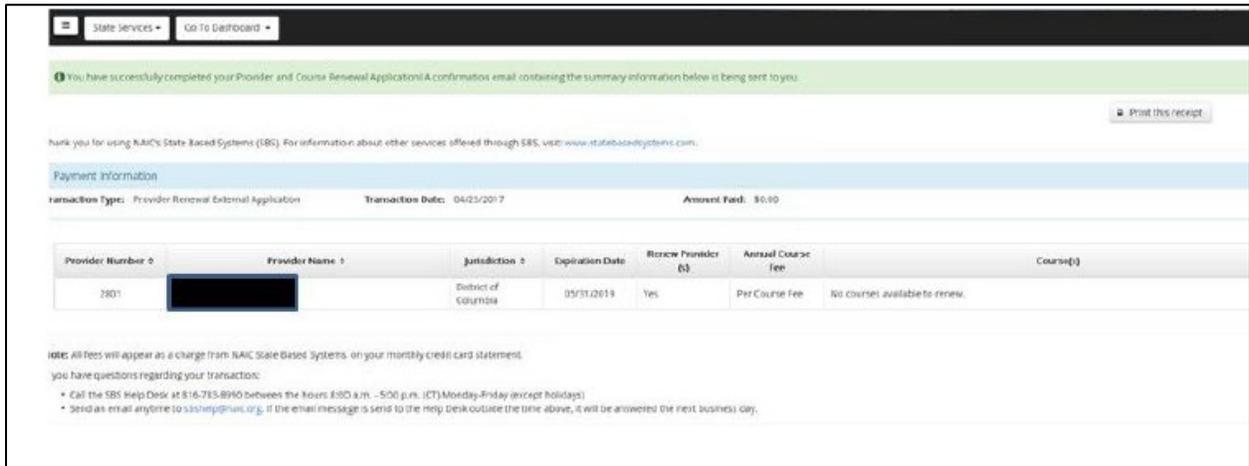
10. User Settings

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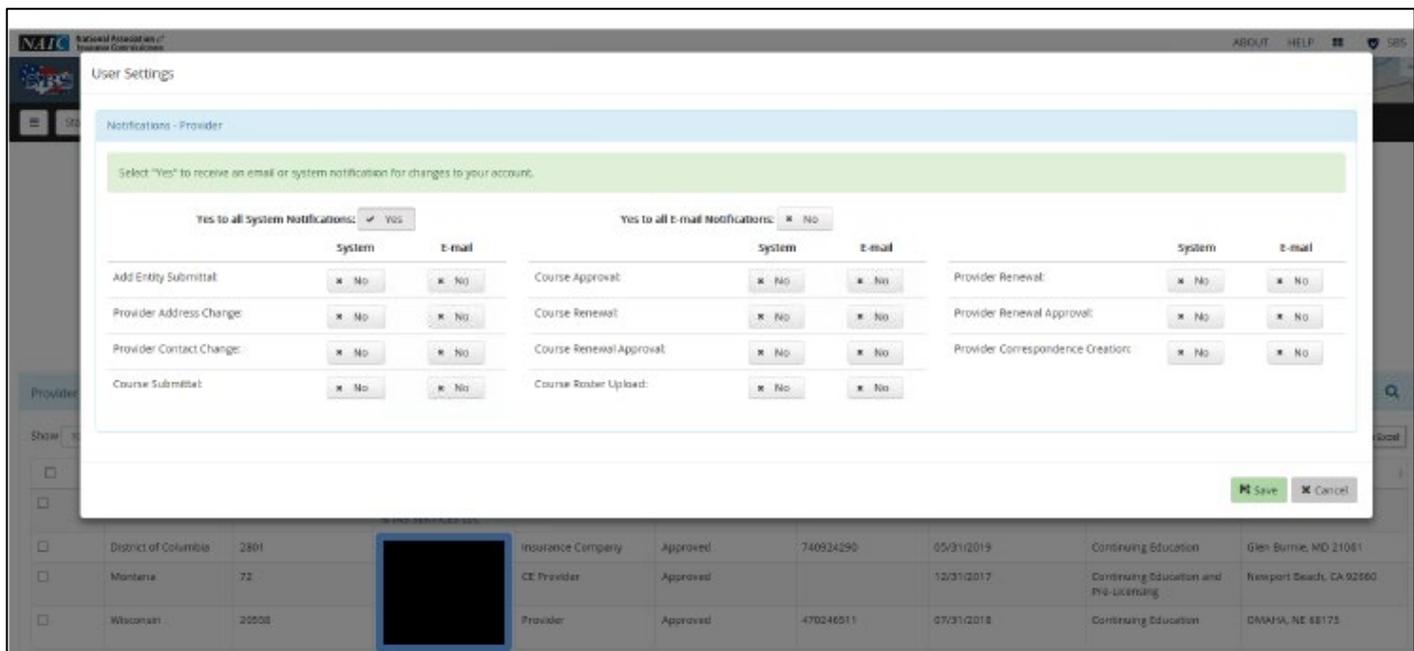
This is the only way a provider is notified when a course or provider license is up for renewal.

440-5781 (7/22/COM)