

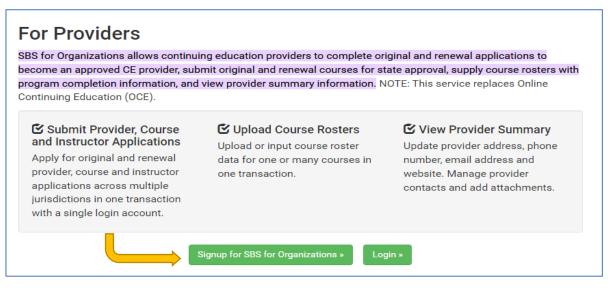
350 Winter St. NE, Rm 410, P.O. Box 14480, Salem, OR 97309

503-378-4140 dfr.oregon.gov

Pharmaceutical Sales Representative

Education Provider Dashboard Functions

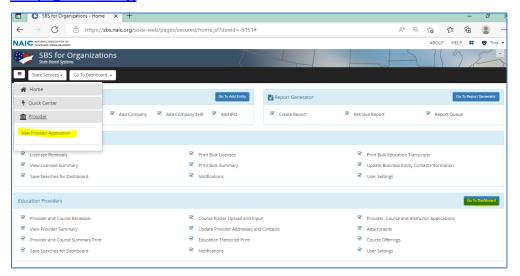
Website: State Based Systems for Organizations



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.

Provider Name:	FEIN:	*Education Type:	* Application Date:
PSR TEST		Continuing Educati 🗸	06/10/2022
*Provider Type:	Have you ever been a Provider in this state?	Annual Fee Classification:	
Pharmaceutical Sal 🗸	○ Yes ○ No	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*.)

none				Email				Website
/pe:	Number:			Туре:		Email:		Type:
Select One				Select One	~			Select One
Add				Add				Add
Туре	Number			Туре		Email		
	Number			Business Email	christina.m.boon	e@dcbs.oregon.gov	ŵ	
Business Primary Phone	555-555-5555	1	ŵ					

Business Address					
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Address Line 3:					
Additional Address Lines . City:	* State/Province:		* ZIP/Postal Code:		* Country:
Salem	Oregon	~	97301		United States
Mailing Address					
Business Address 🗸					
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350 Winter St NE					
Address Line 2:				_	
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Salutation: First Name: Ms.	Middle Name:	*Last Name Boone	e:	Suffix:	*Contact Type: Provider Represent
Pull data from Provider					
Business Address					
Copy From					
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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.

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1 Applicatio	n / 2 Pro	ovider Phon	ie, Email, V	/ebsite / 3 Coni			
Confirmat	ion						
Provide	Provider Name: PSR TEST						
Previous	Next	Finish	Cancel				
Capital Market	NAIC	IC Central Office Executive Office t Analysis Office	9	Address 1100 Walnut Street 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.*)

Provider A	oplication A	pproval	
SB State To You	Based Syste	ems 2:59 P	M
Your Provider Application h	as been successfully approved!		
	you for using NAIC's State Based Sys services offered through SBS, visit: ww		
If you have questions regarding you	r transition:		
holidays).	83-8990 between the hours 8:00 a.m maic.org. If the email message is se next business day.		
How Do I?			
 Print my license Print my education transcript Update my email address 	Find my NPN or license number View company information Find continuing education courses	Manage entities with a single login accross multiple jurisdiction Purchase a report that tracks is licensee information (company appointments, CE compliance,	

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

C ://	rganizatio	ons					<
	Go To Dashboard	d •					
		•					
							Go To Add Entity
2	Add Provider	V	Add Company	V	Add Company EHR	Ľ	Add IRO
s							

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 Jurisdiction:Oregon	Provider FEIN: Provider Status:Approved		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

Course Information		
Course Title:	[≰] is this Course open to the Public? ®Yes ⊂No	Word Count:
ducation Type:Continuing Education	Difficulty:	Home State:
	Select One	Select One
lational Insurance Designation: Oyes @No		Provider Home State ID:
rofessional Designation	Measurement used for successful completions:	
⊖Yes ®No	Select One	
opulate from User Account		
ubmitter Name (if different from provider ontact):	Submitter Phone Number:	Submitter Email Address:

*Course Method: Uner Academic Credit Course Independent Study Classroom Online	Course Group: Miscelianeous Oregon Law Pharmaceutical Sales Representative Property and Casualty	ļ	*General: Optional Exam?	-
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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:				le
06/22/2022				
Attachment Status:				
				~
Upload Cancel				
		← Previous →	Next Pt Fig	ish X Cance
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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 Pi Finish X Cance

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 Type:Pharmaceutica Provider	al Sales Representative	CE	
Provider Number:500024971 Provider FEIN: Provider Education Type:Continuing Education Jurisdiction:Oregon Provider Status:Approved Provider Status:Approved							
+Add Course							
Show 10 v entries					Filter	r	
Course Name	Provider Name	Provider Number	٦ţ	Jurisdiction(s)	Fees 11	11	
Pharmaceutical 101	Tina Boone	500024971		Oregon	\$0.00	ø	ŵ
					Total F	ees \$0.00	
Showing 1 to 1 of 1 entries						Previous	1 Nex
Previous Next Finish Cancel	Service Desk						

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

Fees
\$0.0
\$0.00

Receipt.

						• Princis	is receipt
tank you for using NAIC's	State Based Systems (SBS). For info	ormation about other services (offered through SBS, visit: www.	statebasedsystems.com.			
Payment Information							
ransaction Type: Course	Application	Transaction Date: 06/22/20	22	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
you have questions regar	a charge from NAIC State Based S ding your transaction: k at 816-783-8990 between the ho						
	e to sbshelp@naic.org. If the emai		esk outside the time above, it w	vill be answered the next busir	ness day.		
	Central Office Address ecutive Office Suite 1500 Kansas City, MO 64	8 am to 4 nm (CT)	a 2022 Mating Linear and Inc.	rance Commissioners. All rights reserved			
			© 2022 National Association of Insur	rance commissioners. All rights reserved	3.		

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".

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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.

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

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

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6. Course Roster Search

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

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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#.

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Education Transcript Search	h									
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MAC Control Office + MAC Control Office + Capital Markets & Investment Analysis Office + @	Address 1100 Mulliout Moreet Seiter 1508 Renotes Dhys. MO-64106-2197	Rac (816) 732-9175 8 A.H. Calls p.C. (CMI) Manday - Triday								
				© 2017 National According of 1	Revance Carterioscianers, All	ngnet setaroart.				

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.

	ABKARSAS ABKARSAS KUBARKE DEPARTMENT EDUCATION TRANSCRIPT ULCENSE NUMBER (NPH)										
					LICENSE	DETAILS					
туре	Authority	Status	Expiration Date	Compliance Period	CE Compliant	Compliance Date	Credits Required	Credits Earned	Carryover	Credits Needed For Renew	
Producer	Property, Credit, Casuality	Active	12/17/18	12/18/15 - 12/17/18	Yes	12/18/16	0 fithics, 21 General,	0 Ethics, 0 General,	o General,	ð fithics, 21 General,	
troducer - Pr	evious CE Compliance Period: 12/11	1/2008 - 12/17/2	514			COURSE COMPLETIONS					

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.

Provider Number		Dreakfor Hama		TTR			
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Scroll Down.

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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.

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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.

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The provider should now see the new course offering underneath the section titled "Course Offerings".

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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.

rse Fee Totali
\$0.00
\$0.00
\$0

■ State Services • Go To	Dashboard -						
1 Education Reserval - 2 Review							
Renew	Provider Number 0	Provider Name *	jurisdiction *	Expiration Date	Renew Course(s)	Annual Course fee Type	Course
Coarse Only Renewal	20558		Wisconsin	97/31/2018	Select courses	Per Caurse Fee	\$0
No renewal	72		Montana	12/31/2017	Select courses	Per Course Fee	\$0
Grand Total:							
	Cancel						
NAIC Central Office NAIC Cressative Office Capital Markets & Investment Analysis Office	I100 Walnut Sneet. 8 a.r	enter tets antro no 5 p.m. (SD) nogy - Friday C. 2017 National	el Association of Insurance Commissioners. All rights re	nerved.			

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.

State Services - Go To Dashboard	Select	Course Number	Course Name	Expiration Date	Application Fee	Processing Fee	Total Fee			
Discrimination Reviewall		71491	BUILD A STRONG BOOK OF BUSINESS WITH FEMALE CLIENTS	04/30/2017	48.75	\$0.31	\$9.05			
Rettere	Pro 🖸	71492	A SIMPLE APPROACH TO BUYSELL AGREEMENTS	04/30/2017	\$8,75	\$0.31	\$9.05	nnual Course Pee	Course Fee	Total Te
	Nun	71693	CONNECTING WITH MILLENNIALS	04/30/2017	\$8.75	\$0.31	\$9.05	Туры	LOUISTIC	
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		Wisconsin	07/31/2018	ħū	Per Course Pee	THERE BUILD A STREME BOOK OF BUISINESS WITH HEMALE CLIENTS -0L/10/2017 (1 General) THERE APPROACH TO BUYSELL AGREEMENTS: 0L/80/3017 (1 General) THERE APPROACH TO BUYSELL AGREEMENTS: 0L/80/3017 (1 General) CUMPEL SEED OF THE APPROACH TO BUYSELL AGREEMENTS CUMPEL SEED OF THE APPROACH TO BUYSELL AGREEMENTS CUMPEL SEED OF THE APPROACH TO BUYSELL AGREEMENTS	5 27.18	\$27
4	Grand Total:							\$27

Select Finish

State Based Systems					
State Services - Go To Dashboard -	형태방법 (2013년 - 1997년 - 2017년 - 2017년 - 2017년 - 2017년 - 2017년 - 2017년 1				
1 Education Renewal / 2 Review / 3 Payment Details					
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21640	stevers				
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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

Payment information ansaction Type: - Provider Renewal External Ag								
reaction Type: Provider Renewal External Ap								
	pleation Transaction (Date: 04/23/2017		Amount 7	Naidi \$0.00			
Provider Number 9	Fravider Name 1	jurisdiction t	Depiration Date	Renew Pruvider (5)	Annuel Course		Course(1)	
2801		District of Columbia	05/31.2019	Yes	Per Course Fee	No courses available to renew.		

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.

A Mint	nial Accurciant ann c ^{ar} nar Commissáonnan									ABOUT	HELP \$	
j U	iser Settings											
	Notifications - Provider											
L	Select "Ves" to receive	an email or system notificat	on for changes to	your account.								
L	Yes to all System Notifications: 👻 Yes		Yes	Ye	Yes to all E-mail Notifications: × No							
		System	t-m	al		System	t-mail		System		t-mail	
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	District of Columbia 2801			Insurance Company	Insurance Company Approved 7		84290	05/31/2019	Continuing Education	Glen 6	sumie, MD 2	210
	Montaria	72		CE. Previder	Approvad			12/31/2017	Continuing Education an Pro-Licensing	d Namp	ort Seatt, C	A.9
	Waconain	20508		Provider		Approved 47024		07/31/2018	Continuing Education		A. NE 68175	

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

440-5781 (7/22/COM)