Wisconsin Office of the Commissioner of Insurance

Going Live with NAIC's State Based Systems!

What does this mean for you?

The Office of the Commissioner of Insurance (OCI) will go live on December 14, 2015, with State Based Systems (SBS) in a transition that will be better for both agents and companies. Agents and companies will benefit because the transition will lead to more uniform standards, and establish best practices to better serve all of those who are regulated by OCI. SBS is a new back-office software solution that will enhance the transmission and processing of information to and from the National Producer Database, which will benefit agents, companies, and OCI.

Visit SBS Web site at http://www.statebasedsystems.com/ to learn more.

Important Dates: OCI licensing services and National Insurance Producer Registry (NIPR) services will be unavailable **beginning at 11:59 p.m. CST Monday, November 23, 2015, until Monday, December 14, 2015**. Licensees should plan ahead to prevent any interruptions with their license by completing continuing education as far ahead of schedule as possible. More detailed information for those licensees renewing in November will be available on our web site and provided in license renewal notifications.

Changes for Agents

- **Individual License Numbers** - Starting on December 14, 2015, all agents will start using the National Producer Number (NPN) as the license number instead of the Wisconsin-specific license number. Agents will be able to print a copy of the license at no cost by using the SBS "License Print" tool.
- **License Type -** Agents will no longer have to keep track of multiple license numbers. The SBS system will allow for multiple license types under the same National Producer Number. Agents will be able to view their records by using the SBS "Licensee Lookup" tool.
- **Licensee Notifications** - OCI will transition to e-mail notifications as the primary communication method relating to renewal notices, continuing education requirements and any other notice previously sent via first class mail. This transition to e-mail communication is part of an OCI-wide initiative to streamline business processes. **Agents must maintain a current e-mail address. To verify and/or change your contact information, please visit: http://www.nipr.com/ccr_announcements.htm**
- **Intermediary Firms** (Business Entity - Agency License) - SBS will issue a new license number to a licensed firm. Firms will be able to print a copy of the license at no cost by using the SBS "License Print" tool.
- Report Generator - Users may create a licensee (agent and/or firm) mailing list for a nominal fee. The list includes the licensee's name, license number or National Producer Number, business and mailing address, e-mail address, license type and much more.

SBS Will Offer Essential Services

Wisconsin Launch Page - Find contact information and links to all of the SBS tools for OCI.

Company Lookup - A free public lookup for basic company information to now include Name Changes, Mergers, and Lines of Business.

Licensee Lookup - Free public lookup for licensee information on agents and firms.

Online Licensee Services (OLS) - Fee-based service that allows license printing, address changes and a view of licensing information. Multiple entities may be added under one login ID.

Online Continuing Education (OCE) - Online tool for education providers to electronically submit information and data to the jurisdiction. See the "Changes for Education Providers" section below for more information.

Course Lookup - Free public lookup of continuing education courses, providers and course offerings.

License Print - Unlimited agent license printing for Wisconsin licensees.

Education Transcript - Free tool that allows licensees to pull their real time education transcripts. Transcripts will display what credits are required, what credits have been taken and what credits still need to be taken.

E-mail Address Maintenance - Agents and firms may view and update their e-mail address in real time through this online tool. E-mail addresses are tracked for three address types: business, mailing and residence.

Changes for Companies

- **Company License Numbers** - All companies will be assigned new company numbers based on SBS. Companies may view their new numbers using the SBS "Company Lookup" tool.
- **Appointment Notifications** - Companies will no longer receive a "License Status Notice" via first class mail. Companies may view the status of a licensee using the SBS "Licensee Lookup Tool". Companies may view their current appointments at no cost using the SBS "Company Lookup" tool.
- **Appointment of Agents** - Companies will now submit all appointments and terminations through NIPR or one of their Authorized Business Partners (ABPs). For information on becoming a NIPR subscriber, please contact marketing@nipr.com. The initial appointment fee will be assessed at the time of the appointment submission instead of the annual process.
- **Appointment Renewals** - Company Appointment Renewal invoices will be processed annually online at NIPR.com. This will allow companies to pay by credit card, PayPal, or electronic check. Appointment renewals not paid by the payment due date will automatically cancel.

SBS Help Desk

For errors or help with SBS Online Tools contact:

SBS Help Desk
sbshelp@naic.org
816-783-8990

Monday - Friday: 8 a.m. - 5 p.m. CST

Changes for Education Providers

Providers will be required to submit course rosters through the SBS tool Online Continuing Education (OCE). SBS offers the following functionalities:

- Submit course applications
- Submit course offerings (or schedules)
- Upload course rosters
- View detailed provider information
- Submit instructor applications
- Upload attachments to pending courses

Both CE and PLE Providers will incur a $1.00 fee / per credit hour / per student for course roster

For detailed information regarding the upcoming changes, please visit the Office of the Commissioner of Insurance web site:
http://oci.wi.gov/sbs.htm

Agent questions should be directed to:
ocisbsagentquestions@wisconsin.gov

Company questions should be directed to:
ocisbscompanyquestions@wisconsin.gov

Provider questions should be directed to:
ocisbsagentquestions@wisconsin.gov

NAIC National Association of Insurance Commissioners

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