



Montana Office of the Commissioner of Securities and Insurance



Going Live with NAIC's State Based Systems!

The Montana Office of the Commissioner of Securities and Insurance will go live with a new back-office software solution, State Based Systems (SBS), on **May 6th**. As the regulatory system of choice by the Montana insurance regulators, we encourage the industry to take advantage of our online tools listed below. [Click here to learn more about SBS](#)

What does this mean for Licensees?

Important Changes

- **Individual License Numbers** - All individuals that hold more than one license type will have one license number, no matter how many license types he/she holds. To look up the new license number, use the Licensee Lookup tool starting May 6th.
- **Business Entity License Numbers** - Some business entities will be receiving new license numbers as of May 6th. The new license number may be looked up using the Licensee Lookup tool.
- **License Printing** - Licensees will be able to obtain a PDF license via the SBS License Print or Online Licensee Services (OLS).
- **Education Transcripts** - New to licensees in Montana will be the ability to view your CE transcripts in real time.
- **Reporting of CE Credits** - For the next two year renewal cycle, licensees will continue to report any CE courses they took prior to May 6, 2013 to the Montana insurance department. Any courses taken after May 6, 2013 will be reported to the department by the CE providers. Licensees are encouraged to report any CE courses (that have not yet been reported) to the Montana department as soon as possible. The existing Montana online CE completions tool will be available until April 26th — after this date, any courses taken prior to May 6th will need to be submitted via hardcopy to Montana.

Online Tools

[Montana Launch Page](#) - Find contact information and links to all of the SBS tools for Montana.

[Licensee Lookup](#) - A free public lookup for basic licensee information on individuals and business entities.

[Online Licensee Services \(OLS\)](#) - A fee-based service that allows unlimited license printing, address changes and a view of licensing information. Multiple entities may be added under one login.

[Course Lookup](#) - A free public lookup for continuing education courses, providers and course offerings.

[License Print](#) - SBS offers free limited license printing for Montana. Every major change that occurs to a record will queue up one free license print for individuals or business entities.

[Education Transcript](#) - A 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.

[Email Address Maintenance](#) - Individuals and business entities may view and update email addresses in real time through this online tool. Email addresses are tracked for three address types: Business, Mailing and Residence.

Online Demo for Licensees

We will host two demo sessions via free webinars. If you are interested in attending, please complete this online registration: [Webinar Registration - Licensees](#)

A confirmation e-mail and link will be sent to those who submit the completed form.

What does this mean for Companies?

Important Changes

- **Company License Numbers** - All companies will be assigned new company numbers from the SBS system. On May 6th, companies may view these new numbers using the Company Lookup tool.

Online Tools

[Montana Launch Page](#) - Find contact information and links to all of the SBS tools for Montana.

[Company Lookup](#) - A free public lookup for basic company information.

What does this mean for Providers?

Important Changes

- **Course numbers** - All existing course numbers will be changing. To view the updated numbers starting on May 6, login to SBS OCE.
- **Reporting of CE Credits** - Education providers in Montana will be required to report the course completions for their classes to the Montana insurance department. Starting on May 6th, this new requirement must be completed through the use of the SBS tool Online Continuing Education (OCE). For the next two year renewal cycle, licensees will continue to report any Continuing Education courses they took prior to May 6, 2013 to the Montana insurance department. Any courses taken after May 6, 2013 will be reported to the department by the CE providers.

Online Tools

[Montana Launch Page](#) - Find contact information and links to all of the SBS tools for Montana.

[Online Continuing Education \(OCE\)](#) - The online tool for Montana education providers to electronically submit information and data to the jurisdiction. Providers may submit or upload course applications, course offerings, course rosters and instructor applications. OCE also allows the providers to view their detailed providership information. Course roster submittals submitted through SBS will incur a \$1.00 fee per credit hour, per student.

[Course Lookup](#) - A free public lookup for continuing education courses, providers and course offerings.

[Education Transcript](#) - A 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.

Online Demo for Providers

We will host two demo sessions via free webinars. If you are interested in attending, please complete this online registration: [Webinar Registration - Providers](#)

A confirmation e-mail and link will be sent to those who submit the completed form.

For detailed information regarding these up-coming licensing changes, please visit the Montana Web site: <http://www.csi.mt.gov/>

Links for all online tools will be available from this document starting on May 6th. Please check back for updates.

SBS Help Desk

For errors or help with SBS Online Tools contact:

SBS Help Desk - sbshelp@naic.org 816-783-8990 Hours: 8 a.m. - 5 p.m. CST Monday - Friday