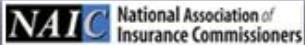




SBS CONNECT



## SBS CONNECT — CREATE NEW ACCOUNT

Before using SBS Connect for the first time, 1) create an account and 2) register a license to the new account. **Both** steps must be completed before the account is considered established.

Navigate to the SBS Connect login page by going to [www.statebasedsystems.com](http://www.statebasedsystems.com) and choosing the appropriate state from the dropdown box in the State Services block.

From the Online Tools list, scroll down to SBS Connect, and click on the [Register for SBS Connect](#) link. The SBS Connect login screen loads.

**SBS Connect**

[Click here](#) to sign up for SBS Connect.

[What is SBS Connect?](#)

**Account Required to Log-In**

User Name  (case-sensitive)

Password  (case-sensitive)

[Forgot User Name or Password?](#)

An SBS Connect Account is required in order to use this service. [Click here](#) to sign-up for SBS Connect and register an account.

### 1 CREATE AN ACCOUNT

On the SBS Connect login page, click the following link to create a new account:  
[Click here](#) to sign up for SBS Connect.

The registration page contains three tabs. Input your information into the form as detailed below. Required fields display an asterisk (\*).

**User Demographics**

All required fields are marked with an \*.

Your First Name \*  Last Name \*

Firm Name

Address Line 1 \*

Address Line 2

Address Line 3

City \*  State \*  ZIP \*

Phone \*  Ext

### User Demographics

Required\* fields are: First Name, Last Name, Address Line 1, City, State, ZIP Code, and Phone Number.

### User Login Account Information

You cannot copy and paste your User Name or Password. You must use the **Backspace** or **Delete** keys to remove and re-type the value.

Enter a User Name: *	<input type="text"/>	The User Name must be 8-15 characters long and can only contain letters and numbers. It is case sensitive.
Re-Enter Your User Name: *	<input type="text"/>	
Select a Password: *	<input type="text"/>	A combination of 7-15 letters and numbers, beginning with a letter.
Enter Password Again: *	<input type="text"/>	
Your City of Birth: *	<input type="text"/>	The Birth City will be used for verification purposes if you forget your password.

### User Account Information

This tab contains the fields for establishing the user name and password. All fields are required\*.

**User Name:** Must contain at least 8 characters but no more than 15, is case sensitive, and cannot be copied and pasted into either field. Letters and numbers can be used, but not punctuation or special characters. Use the backspace or delete key to erase.

**Password:** Must contain at least 7 characters but no more than 15, must begin with a letter, must contain at least one number, is case sensitive, and cannot be copied and pasted into either field. Letters and numbers can be used, but not punctuation or special characters. Use the backspace or delete key to erase.

**City of Birth:** This field is required. The birth city is used for verification of identity in the event of a forgotten user name or password.

### E-mail Notifications

Your E-mail Address: *	<input type="text"/>	All SBS Connect notifications will be sent to this e-mail address.
Enter E-mail Again: *	<input type="text"/>	
Additional E-mail Address:	<input type="text"/>	Secondary e-mail address where notifications will be sent.
Enter 2nd E-mail Again:	<input type="text"/>	

### E-mail Notifications

Input an e-mail address to be used for any e-mail notifications for this account. Also input an additional (optional) e-mail address to receive the same notifications.

### Attestation

As the authorized Requestor, I declare that each Licensee whose information is requested through the SBS Connect application has authorized the Requestor to access and make necessary updates to the licensing information.

Submit

Reset

Back

### Attestation

Selection of this checkbox confirming the attestation statement is required to establish the account, whether you are setting this account up for yourself or for a license you administer.

Click **Submit** to continue. A validation screen is next for verification of input before final submission.

Click **Reset** to erase all the input on the form and begin again.

Click **Back** to return to the SBS Connect login page.

## SBS Connect

Please verify that your registration information is correct.

### User Information

Name: Elmer Fudd  
Firm Name:  
Address: 123 Street Avenue  
Toontown, OHIO,USA 99999  
Phone: (999)555-1212

### User Login Account Information

User Name: elmerfudd  
City of Birth: Toontown

### E-mail Notifications

E-mail Address: efudd@fakedomain.com  
Additional E-mail Address:

### Attestation

As the authorized Requestor, I declare that each Licensee whose information is requested through the SBS Connect application has authorized the Requestor to access and make necessary updates to the licensing information.

Submit

Back

Verify that all information displaying is correct.

Click **Submit** to finalize the account set-up. Once this process is completed, the SBS Connect Welcome page displays. Now go on to step 2) Register a License.

Click **Back** to return to the profile information entry page and correct any error.

## Welcome Page

**Welcome**

Elmer Fudd

[Update Profile](#)

[Change Password](#)

[Register Entity](#)

[License Administrator](#)

[Log Out](#)

**Connect Help**

**For Individual Licensee Requests**

1. Click the Register Entity link then complete the requested information.
2. Once you have registered a license, the Producer tab will display.
3. Click on the Producer tab above to view SBS Connect services available and perform a request.

**For Licensee Administrators of Multiple Licenses**

1. To Add or View your registered licensee(s), click the License Administrator link. This will display the View Multiple Licensees page.
2. In the View Multiple Licensees page, click the Register License link then complete the requested information. Additional licenses can be added by following this same step.
3. To perform a transaction on an already registered license, click the License Administrator link, if you are not already in the View Multiple Licensees page. Then click the preferred licensee from the drop-down list. Once the licensee has been chosen continue by clicking the activity that you wish to perform.

## 2 REGISTER A LICENSE

Before any activity can be performed using this SBS Connect account—printing a license, for example—a single license must be registered to the account.

Click the [Register Entity](#) link on the left side of the Welcome page as shown in the example above.

Home

What type of Entity would you like to Register?

[Click here for the definition of all Entity Types.](#)

Business Entity License  
Individual License

Release 3.2, Build 3.2.1 Dated-07.20.2010  
National Association of Insurance Commissioners. All rights reserved.

First, choose the type of entity you are registering to this account, individual or business entity, from the dropdown box. Click the link immediately to the right of the dropdown box for a definition of the license type.

### For an Individual License...

The screenshot shows a web form for registering an individual license. At the top left is a 'Home' button. Below it is a dropdown menu labeled 'What type of Entity would you like to Register?' with 'Individual License' selected. To the right of the dropdown is a link: 'Click here for the definition of Individual License'. Below this is the instruction: 'Input the License Number or National Producer Number. Then input the last four digits of the Social Security Number (SSN)'. There are three input fields: 'License Number', 'NPN', and 'SSN (last 4 digits)\*'. Below these fields is an 'Add' button.

Input the requested information. For an individual, input the license number **or** National Producer Number (NPN), **and** the last four digits of the Social Security Number (SSN).

### For a Business Entity License...

The screenshot shows a web form for registering a business entity license. At the top left is a 'Home' button. Below it is a dropdown menu labeled 'What type of Entity would you like to Register?' with 'Business Entity License' selected. To the right of the dropdown is a link: 'Click here for the definition of Business Entity License'. Below this is the instruction: 'Input the Business Entity License Number and the full numeric Federal Employer Identification Number (FEIN)'. There are two input fields: 'License Number\*' and 'FEIN\*'. Below these fields is an 'Add' button.

Input the requested information. For a business entity, input the license number **and** the full Federal Employer Identification Number (FEIN).

Click **Add** to continue.

A verification screen displays to validate the input. As you can see in the example below, an individual license is being registered.

The screenshot shows a verification screen. At the top left is a 'Home' button. Below it is a dropdown menu labeled 'What type of Entity would you like to Register?' with a blank dropdown. To the right of the dropdown is a link: 'Click here for the definition of Individual License'. Below this is the title 'INDIVIDUAL LICENSE'. There is a table with three columns: 'License Number', 'NPN', and 'SSN (last 4 digits)\*'. The 'NPN' column contains the value '1234567' and the 'SSN' column contains '1234'. To the right of the table is a 'Delete' button. Below the table is a 'Submit' button.

Click **Submit** to complete the license registration to this account.

Once the process is complete, a success screen displays.

The screenshot shows a success screen. At the top left is a 'Home' button. Below it is the title 'Entities Successfully Registered for SBS Connect'. There is a table with four columns: 'Name:', 'License Number:', 'Npn:', and an empty column. The 'Name:' column contains 'Elmer Fudd', the 'License Number:' column contains '1234567', and the 'Npn:' column contains '1234567'. Below the table is a green plus sign icon followed by the text 'Register an Entity'. To the right of this is the text 'Click the Home button to go to your SBS Connect Home Page' and a 'Home' button.

Click **Home** to go to the SBS Connect Welcome page, and you're done!