

SBS EXTERNAL HEALTHCARE REVIEW—*USER GUIDE*

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SBS CONNECT — CREATE NEW ACCOUNT

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

Navigate to the SBS Connect login page by going to 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.

The image shows the SBS Connect login screen. At the top, the text 'SBS Connect' is displayed in a large, bold, dark red font. Below this, there is a link that says 'Click here to sign up for SBS Connect.' and another link that says 'What is SBS Connect?'. In the center, there is a white rectangular box with a thin black border. Inside this box, the text 'Account Required to Log-In' is at the top. Below it, there are two input fields. The first is labeled 'User Name' and has a small '(case-sensitive)' note to its right. The second is labeled 'Password' and also has a small '(case-sensitive)' note to its right. Below the password field is a link that says 'Forgot User Name or Password?'. At the bottom of the box, there are two buttons: 'Submit' and 'Reset'.

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

The registration page contains four 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: * *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: *

Select a Password: * *A combination of 7-15 letters and numbers, beginning with a letter.*

Enter Password Again: *

Your City of Birth: * *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: * *All SBS Connect notifications will be sent to this e-mail address.*

Enter E-mail Again: *

Additional E-mail Address: *Secondary e-mail address where notifications will be sent.*

Enter 2nd E-mail Again:

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 if you wish.

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.

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.

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, and you will receive a confirmation e-mail on the successful account set-up. Now go on to step 2) Register an Entity.

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

Welcome Page

Welcome B.T. Kloughn 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. For Company or IRO External Healthcare Request 1. Click the Register Entity link then complete the requested information.
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2 REGISTER AN ENTITY

Before any activity can be performed using this SBS Connect account—uploading an attachment, 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.

First, choose the type of entity you are registering to this account—Company or Independent Review Organization—from the dropdown box. Click the link immediately to the right of the dropdown box for a definition of the entity types.

For a Company...

Input the requested information. For a company, input the State Company Number (required). Additionally, inputting the NAIC Company Number (cocode), or the Federal Employer Identification Number (FEIN) while not required, is strongly recommended.

For an Independent Review Organization...

Input the requested information. For an independent review organization, input the IRO number assigned from the state department of insurance.

Click

Add

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

What type of Entity would you like to Register? [Click here for the definition of Company.](#)

COMPANY

State Company Number	NAIC Company Number	FEIN*	
605995		600876836	Delete

Submit

*Required items are marked with an *.*

Click

Submit

to complete the registration to this account.

Once the process is complete, a success screen displays.

Home

Entities Successfully Registered for SBS Connect

Name: Aetna Health and Life Insurance Company Company Number: 605955 Naic Number: 78700

+ Register an Entity

Click the Home button to go to your SBS Connect Home Page

Home

SBS 2012 Spring Release
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Click

Home

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

General Information

After the initial set-up, an account is automatically given a status of Pending. The department of insurance then reviews all accounts, and depending on its business rules, the status is changed to Active, Inactive, or Denied.

Each state department of insurance determines whether a company or independent review organization can only view attachments, or can view **and** upload attachments. Both procedures follow.

There is no size limit when uploading an attachment, but must be an approved type of file as set by the department of insurance for these reviews—PDF, for example.

VIEW ATTACHMENT

Once you have logged into your account and at the Welcome page, click the [External Healthcare Review](#) link. The External Healthcare Review page opens.

Joe Adams
Aetna Health and Life Insurance Company

Tracking ID	Case Status	View Attachments	Upload Attachment
28026	Open	(2)	Upload

Close

On this page are all the open cases for which the user has been granted access, listed by a unique TrackingID number.

Click the View Attachments link that shows the number of attachments available for viewing for that particular case. The External Healthcare Review Attachment Details page opens.

Click **Close** to return to the Welcome page.

Tracking ID: 28026
Case Status: Open

[Upload Attachments](#)

File Name	File Description	Attached By	Effective Date	Attached Date	View Attachments
test.docx	Attachment upload test 1	Elisa Bourgeois	04/18/2012	04/18/2012	
test.docx	Company Attachment	Joe Adams	04/18/2012	04/18/2012	

Back

The TrackingID and Case Status are in the upper-left corner for verification.

The list of attachments displays in table form with a link to view the attachments individually. Click the paper clip icon to open the attachment.

Click **Back** to return to the External Healthcare Review page.

UPLOAD ATTACHMENT

Once you have logged into your account and at the Welcome page, click the [External Healthcare Review](#) link. The External Healthcare Review page opens.

Joe Adams
Aetna Health and Life Insurance Company

Tracking ID	Case Status	View Attachments	Upload Attachment
28026	Open	(2)	Upload

Close

On this page are all the open cases for which the user has been granted access, listed by a unique TrackingID number. In the last column of the table is the [Upload](#) link to upload additional attachments for that case.

OR
Click the View Attachments link that shows the number of attachments available for viewing for that particular case. The External Healthcare Review Attachment Details page opens.

Tracking ID: 28026
Case Status: Open

[Upload Attachments](#)

File Name	File Description	Attached By	Effective Date	Attached Date	View Attachments
test.docx	Attachment upload test 1	Elisa Bourgeois	04/18/2012	04/18/2012	View
test.docx	Company Attachment	Joe Adams	04/18/2012	04/18/2012	View

Back

The TrackingID and Case Status are in the upper-left corner for verification. The list of attachments displays in table form with a link for each to view the attachments individually, and in the upper-right corner is the [Upload Attachments](#) link. Click to load the Add Attachment Information page.

Add Attachment Information Page

Add Attachment

File Description

Maximum Description Limit- 200 Characters. Characters Left 200

Effective Date 1/12

Attachment File [Browse...](#)

Add Row

Submit Close

Add Attachment

File Description: a brief summary of what the attached file contains or its significance is required*. (200 characters max.)

Effective Date: Optional information—use as needed.

Attachment File: Click the Browse button to attach the file from the files on your PC-available drives. Select as you would from Windows® Explorer with its directories, subdirectories, and files.

Submit

Attaches the file.

Close

Exits the Add Attachment Information page without attaching the document.

Add Row

Adds a row for attaching more than one document.