



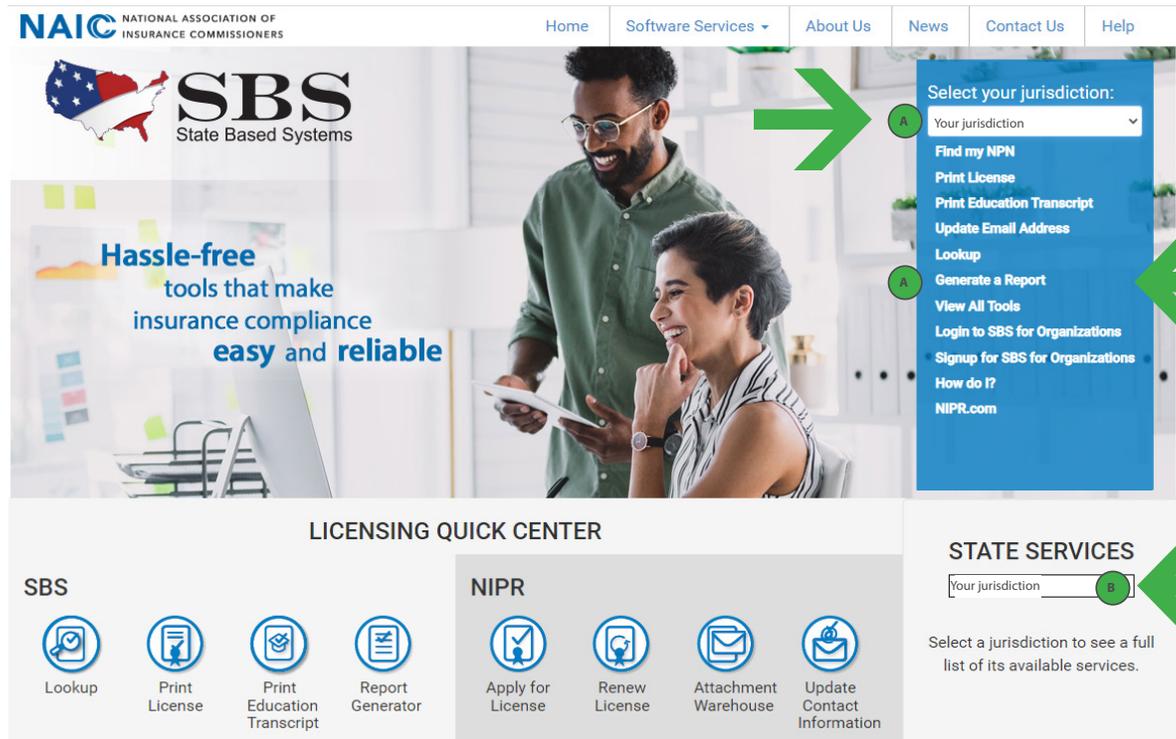
➔ HOW DO I: GENERATE A REPORT OF LICENSEES?

Report Generator allows you to request a list of data for a specific jurisdiction using a variety of search criteria. Some of the data included in the report includes: license number, license type, license status, CE compliance, full business address, email address and line of authority.

1 Navigate to the Report Generator tool from the SBS website home page

There are two ways to navigate to the Report Generator tool:

- **A. Select Your Jurisdiction:** In the top right, select your jurisdiction. From the options that appear select 'Generate a Report.'
- **B. State Services Launch Page:** In the bottom right hand corner of the screen, select a jurisdiction from the 'State Services' dropdown. Select 'Report Generator' on the State Launch Page.



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2 Select criteria for your report

Use a robust selection of criteria to narrow the results of your report. Click 'Next' when finished. Use the support links to the left to retrieve an existing report and to learn more about Report Generator before running your report.

The screenshot displays the 'Report Generator' interface within the 'State Based Systems' application. The top navigation bar includes the application name and a 'State Services' dropdown. Below this is a breadcrumb trail: '1 Search / 2 Review / 3 Payment / 4 Payment Details'. The main content area is divided into a sidebar on the left and a central form on the right. The sidebar, titled 'SBS Support Center', contains several links: 'How do I?', 'Retrieve an existing report', 'View a sample of the report', 'Determine the cost of a report', 'Purchase the report', 'Download the report', 'Find info about the output format', and 'Use Report Generator Queue'. The central form, titled 'Report Generator', contains the following fields and controls:

- Jurisdiction:** A dropdown menu with 'Alabama' selected.
- Entity Type:** A dropdown menu with 'All' selected.
- Appointed to NAIC Co Code:** A text input field with the instruction 'Use , or ; to separate multiple values'.
- License Type:** A multi-select dropdown menu with 'ALL' selected. Other options include 'Insurance Producer', 'Adjuster', 'Service Representative', and 'Managing General Agent'. The instruction is 'Use Ctrl-click to select multiple rows'.
- Line of Authority:** A multi-select dropdown menu with 'ALL' selected. The instruction is 'Use Ctrl-click to select multiple rows'.
- Resident License:** A dropdown menu with 'All' selected.
- CE Compliant:** A dropdown menu with 'All' selected.
- Business City:** A text input field with the instruction 'Use , or ; to separate multiple values'.
- Has Business Email address :** A dropdown menu with 'All' selected.
- Business ZIP/Postal Code:** A text input field with the instruction 'Use , or ; to separate multiple values'.
- Domicile State:** A multi-select dropdown menu with 'Arizona' selected. Other options include 'Arkansas', 'Armed Forces Americas', 'Armed Forces Other', 'Armed Forces Pacific', and 'British Columbia'. The instruction is 'Use Ctrl-click to select multiple rows'.
- First Active Date From: (mm/dd/yyyy)** and **First Active Date To: (mm/dd/yyyy)**: Two text input fields.
- Expiration Date From: (mm/dd/yyyy)** and **Expiration Date To: (mm/dd/yyyy)**: Two text input fields.

At the bottom of the form, there are four buttons: 'Previous', 'Next', 'Finish', and 'Cancel'.

3 Review report details and name your report

Review the summary of your report, including the number of rows returned and the cost. Return to the search criteria to make changes by using the 'Previous' button. When finished, check 'I agree to the NAIC's Terms and Conditions' and click 'Next.'

State Services -

1 Search / 2 Review / 3 Payment / 4 Payment Details

Number of Rows on Report: 6345

Report Generator Summary

Name Your Report :	Laurens Report
Jurisdiction :	Alabama
Entity Type :	All
CoCode :	
License Type :	Insurance Producer
Line of Authority :	
Resident :	All
CE Compliance :	No
Business City :	
Business Email :	All
Business ZIP/Postal Code :	
Domicile State :	
First Active Date :	
Expiration Date :	Between 8-Apr-20 and 31-Dec-20

Report Summary

Rows Returned :	Cost per Row :	Total :
6345	\$0.03	\$190.35

Minimum fee for report generator is \$30.00

I agree to the NAIC's [Terms and Conditions](#)

Previous Next Finish Cancel

BETA

4 Review payment summary

Review the cost for your report. Note that all fees are non-refundable. Click 'Next.'

State Services -

1 Search / 2 Review / 3 Payment / 4 Payment Details

All Fees are Non-Refundable

Fee Label	Amount
Application Fee	\$190.35
Total	\$190.35

Previous Next Finish Cancel

5 Enter payment details

Enter cardholder information. When you click 'Finish,' you will arrive at a screen to enter payment details which will accept PayPal, American Express, Discover, MasterCard and VISA payment types.

State Services -

1 Search / 2 Review / 3 Payment / 4 Payment Details

Payment Details

* Card Holder First Name:

* Card Holder Last Name:

* Billing Street Name:

* Billing City:

* Billing State:

* Billing Country:

* Billing ZIP Code:

* Email:

* Amount:

* Phone Number:

Previous Next Finish Cancel

State Services -

Credit Card Details

Credit Card Payment

Pay with PayPal

The faster, safer way to pay [CHECK OUT WITH PAYPAL](#)

Pay with credit or debit card

Card number

Expiration date

CVC

Cancel Payment

6 Keep confirmation details for your record and download your report

Download your report by clicking the blue 'Download Your Report.' The report will generate as a CSV file. Keep these details for your record by printing this page or saving the confirmation email. You will need your Pin Number and Transaction Number if want to retrieve this report again.

State Services -

You have successfully completed your Report Generator order! A confirmation email containing the summary information below is being sent to you. [Print this receipt](#)

Thank you for using NAIC's State Based Systems (SBS). For information about other services offered through SBS, visit: www.statebasedsystems.com.

Pin Number : 344889757 [Download Your Report](#) Transaction Number : 163799893 Number of Rows on Report : 6345

Note: Some reports may take a long time to generate based on their size. You may choose to download your report now or you may leave this page and come back later. The Download Your Report button will become available when the report has been generated and is available for download. If you choose to come back later, use the link supplied in the confirmation email to download the report.

Payment Information		
Lauren Ashley 123 Main Street Kansas City, Missouri, 12345 United States	Transaction Date: 04/08/2020	Payment Method: PayPal/Credit/Debit Card
Phone Number: 123-456-7895	Authorization Payment Number: 344889757	Amount Paid: \$190.35
Email: lashley@naic.org	Transaction Type: Report Generator	