

SBS CONNECT ACCOUNT REGISTRATION INSTRUCTIONS

STEP 1

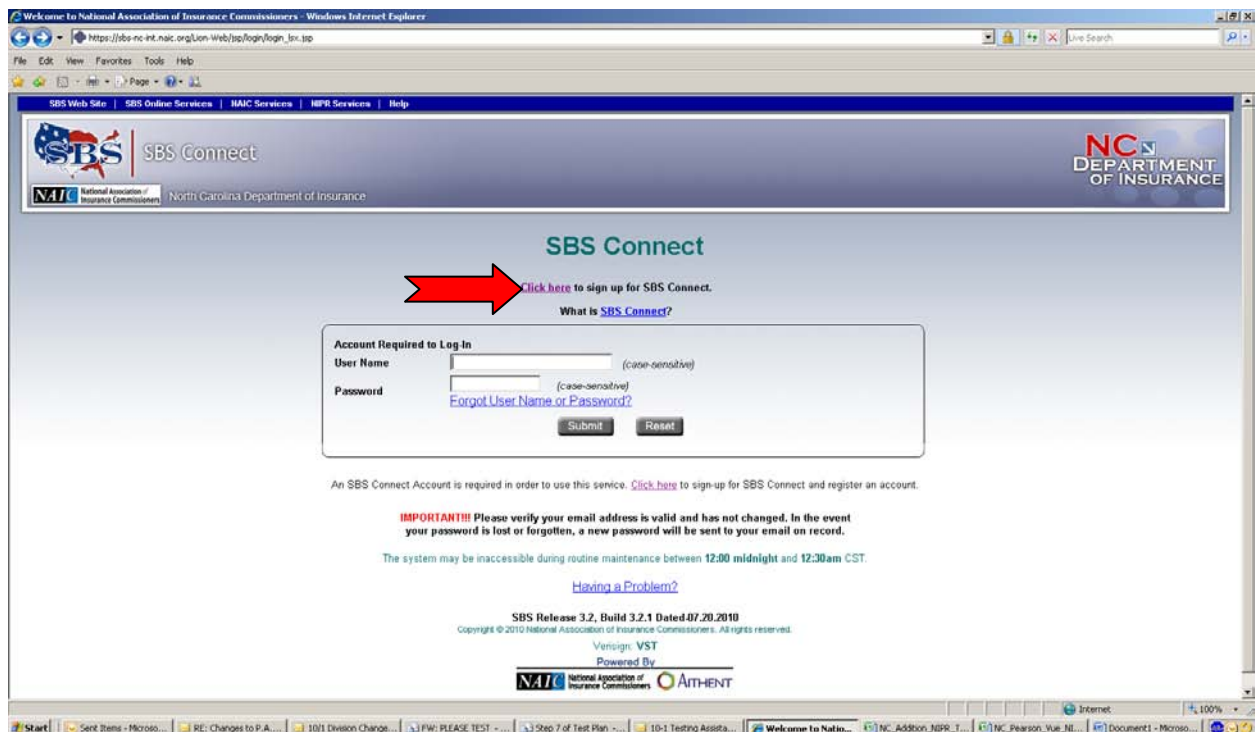
Access SBS Connect through the following website link: https://sbs-nc-int.naic.org/Lion-Web/jsp/login/login_lsx.jsp

STEP 2

The first time that you use SBS Connect, you must first create your own personal SBS Connect account and link it to your license by entering your National Producer Number (NPN) for individual licenses or to your License Number for business entities.

STEP 3

Click on Sign Up for an SBS Account (*RED ARROW indicates on below screen print*)



STEP 4

Enter your First and Last name, address, and phone number. Please note that this address information is for the SBS Account setup only and DOES NOT update the address on your license record.

The screenshot shows the SBS Connect registration page. At the top, there are logos for SBS, SBS Connect, and the NC Department of Insurance. Below the logos, a small text block explains that SBS Connect is a service offered by the National Association of Insurance Commissioners to the NCDOI. A link "Already Registered? Click here to login." is provided. The main section is titled "User Demographics" and contains several input fields: "Your First Name *" (with "John" entered), "Last Name *" (with "Agent" entered), "Firm Name", "Address Line 1 *" (with "1234 Main Street" entered), "Address Line 2", "Address Line 3", "City *" (with "Raleigh" entered), "State *" (a dropdown menu showing "NORTH CAROLINA, USA"), "ZIP *" (with "27618" entered), and "Phone *" (with "(919) 887-6800" entered). Below the demographics section is a section titled "User Login Account Information".

STEP 5

Enter your user login account information:

- **Choose your login ID** - The User Name must be 8-15 characters long and can only contain letters and numbers. It is case sensitive.
- **Choose your Password** – The Password selected must be a combination of 7-15 letters and numbers, beginning with a letter.
- **Enter your city of birth** - The Birth City will be used for verification purposes if you forget your password.

The screenshot shows the "User Login Account Information" section of the form. It includes the following fields and instructions: "Enter a User Name: *" with "Johnsmith" entered and a note "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."; "Re-Enter Your User Name: *" with "Johnsmith" entered; "Select a Password: *" with "*****" entered and a note "The User Name must be 8-15 characters long and can only contain letters and numbers. It is case sensitive."; "Enter Password Again: *" with "*****" entered; and "Your City of Birth: *" with "New York" entered and a note "A combination of 7-15 letters and numbers, beginning with a letter." and "The Birth City will be used for verification purposes if you forget your password."

STEP 6

Provide your e-mail address and choose the electronic license status notifications that you wish to receive:

- **Enter primary e-mail address twice** – *All SBS Connect notifications will be sent to this e-mail address.*
- **Enter secondary e-mail address twice** – *Optional*
- **Select “YES” to sign up for e-mail notifications of license events** - *Optional*

E-mail Notifications

Your E-mail Address: * johnSmith@yahoo.com *All SBS Connect notifications will be sent to this e-mail address.*

Enter E-mail Again: * johnSmith@yahoo.com

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

Enter 2nd E-mail Again: jsmith@yahoo.com

Would you like to be notified by e-mail when the following changes occur? ☒ Yes To All

Address Change: ☒ Yes ☐ No

Name Change: ☒ Yes ☐ No

License Status Change: ☒ Yes ☐ No

Residency Status Change: ☒ Yes ☐ No

Line of Authority Additions: ☒ Yes ☐ No

Line of Authority Deletions: ☒ Yes ☐ No

Original License Approval: ☒ Yes ☐ No

License Renewal Notification: ☒ Yes ☐ No

License Renewal Approval: ☒ Yes ☐ No

Doing Business As Name Addition: ☒ Yes ☐ No

Doing Business As Name Deletion: ☒ Yes ☐ No

STEP 7

- **Check attestation box** – *Indicates that you are authorized by the licensee whose information is requested through the SBS Connect application to make necessary updates to the licensing information.*
- **Click SUBMIT**

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

STEP 8

- **Review and Verify your registration information is correct**
- **Print this page for your records and future access to SBS Account** - *It contains your login ID and city of birth, but does not show you password. You might wish to note your password on this document for your records.*

- After verifying information is correct, Click Submit

User Information
Name: John Agent
Firm Name:
Address: 1234 Main Street
Raleigh, NORTH CAROLINA, USA 27518
Phone: (919)807-6800

User Login Account Information
User Name: Johnsmith
City of Birth: New York

E-mail Notifications
E-mail Address: johnsmith@yahoo.com
Additional E-mail Address: jsmith@yahoo.com

You will be notified by e-mail when the following changes occur:
Address Change: Yes
Name Change: Yes
License Status Change: Yes
Residency Status Change: Yes
Line of Authority Additions: Yes
Line of Authority Deletions: Yes
Original License Approval: Yes
License Renewal Notification: Yes
License Renewal Approval: Yes
Doing Business As Name Addition: Yes
Doing Business As Name Deletion: Yes

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

STEP 9

- Register Your License – Select Register Entity (RED Arrow in below screen print)

SBS Connect
North Carolina Department of Insurance

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.

STEP 10

- **Select entity type:** *Select Individual license or Business Entity license*
 - **For Individual Licenses:** *Enter your NPN and the last four digits of your Social Security Number*
 - **If you do not know your NPN number** – go to the following website link provided by NIPR to lookup your NPN: <https://pdb.nipr.com/html/PacNpnSearch.html>
 - **For Business Entity Licenses:** *Enter your License Number and the full Federal Tax ID Number (FEIN) of the business entity*
 - **If you do not know the Business Entity license number** – please the following website link provided by SBS to lookup your business entity by searching the business entity name. The license number is the first column once you locate the business entity license: <https://sbs-nc.naic.org/Lion-Web/jsp/sbsreports/AgentLookup.jsp>
- **Then Click ADD**

The screenshot shows the SBS Connect registration page. At the top, there is a navigation bar with links: SBS Web Site, SBS Online Services, NAIC Services, NIPR Services, and Help. Below this is the SBS Connect header with the NAIC logo and the text 'North Carolina Department of Insurance'. A 'Home' button is visible. The main content area asks 'What type of Entity would you like to Register?' with a dropdown menu set to 'Individual License'. Below this, it says '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' (empty), 'NPN' (containing '15825456'), and 'SSN (last 4 digits)*' (containing '8516'). An 'Add' button is below these fields. At the bottom, there is a footer with the text 'Required items are marked with an *', 'SBS Release 3.2, Build 3.2.1 Dated 07.20.2010', 'Copyright © 2010 National Association of Insurance Commissioners. All rights reserved.', 'Vensign: VST', 'Powered By', and logos for NAIC and AUTHENT.

- **Verify the information appears correctly**
- **Then Submit**

This screenshot shows the same SBS Connect registration page, but with the 'Individual License' section expanded. The 'What type of Entity would you like to Register?' dropdown is now set to 'Individual License'. Below this, the text 'INDIVIDUAL LICENSE' is centered. There is a table with three columns: 'License Number', 'NPN', and 'SSN (last 4 digits)*'. The 'NPN' column contains '15825456' and the 'SSN (last 4 digits)*' column contains '8516'. A 'Delete' button is to the right of the SSN field. Below the table is a 'Submit' button. The footer is identical to the previous screenshot, including the text 'Required items are marked with an *', 'SBS Release 3.2, Build 3.2.1 Dated 07.20.2010', 'Copyright © 2010 National Association of Insurance Commissioners. All rights reserved.', 'Vensign: VST', 'Powered By', and logos for NAIC and AUTHENT.

STEP 11

- **Verify the license name and NPN or License Number appears correctly**
- **Then Submit**

The screenshot shows the SBS Connect registration page. At the top, there is a navigation bar with links: SBS Web Site, SBS Online Services, NAIC Services, NIPR Services, and Help. Below this is the SBS Connect header with the NAIC logo and the text "North Carolina Department of Insurance". A "Home" button is located on the left. The main content area displays "Entities Successfully Registered for SBS Connect" with a table showing the registration details for John Q. Agnew. Below the table is a "Register an Entity" button with a green plus icon. To the right, there is a "Home" button and a link to "Click the Home button to go to your SBS Connect Home Page". At the bottom, there is a footer with the SBS Release 3.2, Build 3.2.1 Dated 07/20/2010, Copyright © 2010 National Association of Insurance Commissioners, All rights reserved. The footer also includes the VeriSign VST logo and the text "Powered By" with the NAIC and AuthenT logos.

Name:	License Number:	Npn:
John Q. Agnew	15825456	15825456

[+ Register an Entity](#)

[Home](#)

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

SBS Release 3.2, Build 3.2.1 Dated 07/20/2010
Copyright © 2010 National Association of Insurance Commissioners. All rights reserved.
VeriSign: VST
Powered By

NAIC National Association of Insurance Commissioners

STEP 12

- **Click on HOME – RED arrow on screen print below**

The screenshot shows the SBS Connect registration page, similar to the one in Step 11, but with the registration details for Matthew Koontz. A red arrow points to the "Home" button in the bottom right corner of the main content area.

Name:	License Number:	Npn:
MATTHEW KOONTZ	15825456	15825456

[+ Register an Entity](#)

[Home](#)

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

You can then logout of SBS Connect and you will receive a confirmation e-mail from SBS Connect of a successful SBS Connect account registration.

Log back into SBS Connect with your User Name and Password if you want to change any of your SBS Connect account registration information or change the electronic notification options.