

2023 Charges

The **Uniform Education (D) Working Group** will:

- A. Update, as needed, the reciprocity guidelines, the uniform application forms for continuing education (CE) providers, and the process for state review and approval of instructors and courses. Provide any recommended updates to the Producer Licensing (D) Task Force by the 2023 Fall National Meeting.
- B. Coordinate with NAIC parent committees, task forces, and/or working groups to review and provide recommendations, as necessary, on prelicensing education and CE requirements that are included in NAIC model acts, regulations, and/or standards.

Questions Concerning Continuing Education Credits - Home State

- What happens when a course is not approved by the home state? Should providers submit to one other state and use that as the home state for submission to other states on a reciprocal basis? How do providers select this other state? Is there a system they follow or do they "shop" other states? A note to other states is to peruse the materials to determine why that home state did not approve that course.
- A consequence of the above is to have the different course platform require that the home state field be a required field during course submission. Perhaps a comment field be added for providers' statements to clarify matters.
- What should the process be when a company changes provider vendors? Should the courses maintain the previous home state or change per the new vendor's home state which would mean another substantive review of the course?