##### Part III - Section I – Appendix H



**INSTRUCTION SHEET**

|  |
| --- |
| NOTE: This course may NOT be advertised or offered as approved in the state to which application has been made until approval has been received from the Insurance Department.  |

**1. If you are a PROVIDER filing for approval from the Home State:**

*1.1* Complete all the fields in the “Provider Information” section except “Reciprocal State” and the adjacent “Provider #” fields.

 *1.2* Complete the Course Information Section.

 *1.3* In the “Credit Hours Requested and Course/Hours Decision” section, complete the “Hrs. Requested by Provider” columns, detailing in the respective columns the number of hours for sales – and marketing-related instruction and the number of hours for other insurance-related instruction. Please note the following:

*1.3.1* When using this application, which is governed by the NAIC CE Reciprocity Agreement in conjunction with ‘states’ laws, only whole numbers of credit hours will be approved – partial hours will be eliminated.

*1.3.2* States that approve sales/marketing topics will consider the hours in the “sales/Mktg” column and the hours in the “Insurance” column when deciding the number of hours to approve. States that do not permit sales/marketing topics as part of continuing education credit hours will only consider the hours shown in the “Insurance” column when making their credit-hour approval decisions.

*1.3.3* Contact the individual state to determine whether there are any specific requirements for submitting insurance adjuster courses.

*1.4* Submit the application form along with required course materials, a detailed course outline, instructor information, if required, and the required course application fee. Refer to website below for instructor information

([www.naic.org/documents/urtt\_cer\_CE\_Matrix.xls](http://www.naic.org/documents/urtt_cer_CE_Matrix.xls)).

**2. If you are a PROVIDER filing for approval from a Reciprocal State:**

*2.1* Make a sufficient number of photocopies of the Home State approval form to enable you to submit a copy of this application to each of the Reciprocal States where you are seeking credit.

*2.2* On each application, write the Reciprocal State and the provider number assigned to you by that state in the “Reciprocal State” and adjacent “Provider #” fields.

*2.3* Send the CER application, home state approval, if home state issues one, a detailed course outline, and the required fee to the reciprocal state. If this is a National Course\*, the Providers will be allowed to submit an agenda which must include date, time, each topic and event location in lieu of a detailed course outline.

2.4 Subsequent national course offerings should only be reported for events that are conducted in the “home” state.

\* **National Course** is defined as an approved program of instruction in insurance related topics, offered by an approved provider, and leads to a national professional designation or is a course offered to individuals who must update their designation once it is earned.

**3. If you are a HOME STATE or the designated Representative of the Home State:**

 *3.1* After reviewing the course materials, complete the “Hrs Approved by Home State” column.

 *3.2* Enter the date of approval, course # assigned, course approval expiration date. Sign the CER Form OR attach the home state approval form.

 *3.3* If the class is not approved, note it on the bottom of the CER Form.

**4. If you are the RECIPROCAL STATE or designated representative of the Reciprocal State:**

 *4.1* After reviewing “Hrs approved by Home State” complete the “Hrs Approved by Reciprocal State”.

 *4.2* Enter the date of approval, course number assigned, course approval expiration date. Sign the CER Form OR attach the reciprocal state approval form.

 *4.3* If the class is not approved, note it on the bottom of the CER Form.