

NAIC CONTINUING EDUCATION RECIPROcity (CER) AGREEMENT - 2019 VERSION

Whereas, the Commissioners find that it is in the best interest of each of their states and insurance producers to simplify the CER

APPENDIX A

UNIFORM CONTINUING EDUCATION RECIPROCITY COURSE FILING FORM

Please clearly print or type information on this

INSTRUCTION SHEET

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, detc(S)0.8 (d [(S)5.894 (ou)12.1 (rgng 2.1 (rgn (he)4.2 (P)7.7 (e)4.2 (di)6.9(i)6.9 p(c)4.2 (t)6.9 (i)6.9 (on,)3 v(“)4c P)7.7 (ui)6.9

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APPENDIX B

Continuing Education Recommended Guidelines for Online Courses

Goal: To deliver functional computer-based internet courses that offer quality insurance and/or risk management material in a password-protected online environment.

Key Components:

- x Material that is current, relevant, accurate, and that includes valid reference materials, graphics and interactivity.
- x Clearly defined objectives and course completion criteria
- x Specific instructions to register, navigate and complete the course work
- x Technical support/provider representative should be available during business hours and response provided within 24hours of initial contact.
- x Instructors/subject matter experts must be available to answer student questions during provider business hours

x Process to authenticate student identity such as password and security questions

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APPENDIX C

COURSE GUIDELINES FOR CLASSROOM WEBINAR/WEBCAST DELIVERY

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APPENDIX D

RECOMMENDED APPROVED/NOT APPROVED TOPICS FOR CE CREDIT

Approved Topics

1. Actuarial mathematics, statistics and probability – in relation to insurance
2. Assigned risk – in relation to insurance
3. Claims adjusting
4. Courses leading to and maintaining insurance designations
5. Employee benefit plans – in relation to insurance
6. Errors and omissions – in relation to insurance
7. Estate planning/taxation – in relation to insurance
8. Ethics
9. Fundamentals/principles of insurance (including but not limited to: annuities, crop and hail, life, accident and health, property/casualty [P/C], etc.)
10. Insurance accounting/actuarial considerations
11. Insurance contract/policy comparison and analysis
12. Insurance fraud
13. Insurance laws, rules, regulations and regulatory updates
14. Insurance policy provisions
15. Insurance product-specific knowledge
16. Insurance rating/underwriting/claims
17. Insurance tax laws
18. Legal principles – in relation to insurance
19. Long-term care/partnership
20. Loss prevention, control and mitigation – in relation to insurance
21. Managed care
22. Principles of risk management – in relation to insurance
23. Proper uses of insurance products
24. Real Estate Settlement Procedures Act (RESPA) – in relation to insurance
25. Restoration – addresses claims, loss control issues and mitigation – in relation to insurance
26. Retirement planning – in relation to insurance
27. Securities – in relation to insurance
28. Suitability in insurance products
29. Surety bail bond
30. Underwriting principles – in relation to insurance
31. Viaticals/life settlements – in relation to insurance

Other topics approved that contribute substantive knowledge relating to the field of insurance and expands competence of the licensee.

RECOMMENDED APPROVED/NOT APPROVED TOPICS FOR CE CREDIT

Not Approved Topics

1. Automation
2. Clerical functions
3. Computer science
4. Computer training/skills or software presentations