Provider Licensing and Liability Insurance



After signing in, click on **Profile** in the Navigation window. Here you will see your Details, Counseling Locations, Licensing, Liability Insurance, Documents, and Knowledge Base.

Licensing

1. Click on the Licensing tab.

| Prov | Provider Details | | Working Hours () Licensing | | Liability Insurance | EAP Activity | Documents | Knowled | > | |
|------|------------------|---------------|----------------------------|----------------|---------------------|-----------------|-----------|----------------|-------------|---|
| New | Licen | sing | | | | | | Remov | re Selected | > |
| | | LICENSE TY | (PE Y | LICENSE NUMBER | Ŷ | EXPIRATION DATE | Y | STATE PROVINCE | | 7 |
| | Ø | LCSW | | 123456 | | 5/1/2022 | | CA | | |
| | Ø | LCSW | | 321654 | | 6/30/2022 | | CO | | |
| < | 1 | \rightarrow | | | | | | | 20 - | |

- 2. To add a new license:
 - a. Click on New Licensing.

| Provider Details | L Counseling Locations | Working Hours | Licensing | Liability Insurance | EAP Activity | Documents | Knowled | $\langle \rangle$ |
|------------------|------------------------|---------------|-----------|---------------------|--------------|-----------|-------------|-------------------|
| New Licensing 🔶 | a | | | | | Remov | ve Selected | ð |

- b. Enter your License Number.
- c. Select your **License Type** from the drop-down.list
- d. Enter the **Expiration Date**. Click on the drop-down list to access the calendar option or type the date directly in the field. The format is mm/dd/yyyy.



| Licensing | | | f OK Cancel |
|----------------------|-------|-------------------|-------------|
| b LICENSE NUMBER* | | EXPIRATION DATE:* | d |
| 987456 | 5 | 7/31/2022 | |
| LICENSE TYPE: | | STATE PROVINCE: | |
| LCSW | · · · | AZ | A 4 |
| c | | | e |

- e. Enter the state province where you are licensed. Click on the search option to bring up a listing of States/Provinces.
 - i. Type in the State Province.
 - ii. Click Search.
 - iii. Click on the State Province in the results to select.
 - iv. Click **OK** to confirm your selection and return to the previous page.

| State Province i | ï |
|------------------|-----|
| az | |
| NAME | t Y |
| Ĩ | |
| | |



- f. Click **OK** to save and return to the previous page.
- g. To edit an existing license entry, click the **EDIT** symbol.

| Prov | Provider Details 🏦 Counseling Locations Working | | Working Hours | Cicensing | Liability Insurance | EAP Activity | Documents | Knowled | $\langle \rangle$ | |
|------|---|-------------|---------------|----------------|---------------------|-----------------|-----------|----------------|-------------------|---|
| New | Licensi | ing | g | | | | | Remov | re Selected | Ð |
| | | LICP & TYPE | Ŷ | LICENSE NUMBER | Ŷ | EXPIRATION DATE | Y | STATE PROVINCE | | Y |
| | Ø | LCSW | | 123456 | | 5/1/2022 | | CA | | |
| | Ø | LCSW | | 321654 | | 6/30/2022 | | СО | | |
| | Ø | LCSW | | 987456 | | 1/1/2023 | | AZ | | |

h. Update the information below. Click **OK** to confirm your changes and return to the previous page.



| | EVERATION DATE.* | | |
|-----|------------------|---|---|
| | 5/1/2022 | | • |
| | STATE PROVINCE: | | |
| - 🔹 | CA | | الم 🕹 |
| | ₩ <u>.</u> | EXPIRATION DATE:* 5/1/2022 STATE PROVINCE: CA | EXPIRATION DATE:* 5/1/2022 STATE PROVINCE: CA |

Liability Insurance

1. Click on the Liability Insurance tab.

| Prov | Provider Details | | L Counseling Locations | Working Hours 3 Licensing | | Liability Insurance | | EAP Activity | 🔁 D | ocuments | Knowled | $\langle \rangle$ | |
|-------------------------|----------------------------------|------------|------------------------|---------------------------|--------------|---------------------|---------|--------------|----------------|----------|----------------|-------------------|---|
| New Liability Insurance | | | | | | | | | | | Remove | Selected | Ð |
| | | INSURAN | CE CARRIER | Y | POLICY NUMBE | R Y | ADDRESS | Y | EFFECTIVE DATE | Y | EXPIRATION DAT | ΓE | Y |
| | Ø | Allstate I | nsurance Company | | 654321 | | | | 4/1/2021 | | 4/1/2023 | | |
| | Farmers Insurance Company 987654 | | | | | 5/31/2022 | | | | | | | |
| < | 1 | > | | | | | | | | | | 20 | • |

- 2. To add a new license:
 - a. Click on New Liability Insurance.

| Provider Details | Locations | Working Hours | Licensing | Liability Insurance | e EAP Activity | Documents | Knowled | $\langle \rangle$ |
|-----------------------|-----------|---------------|-----------|---------------------|----------------|-----------|-------------|-------------------|
| New Liability Insuran | ce 🛟 💼 a | | | | | Remov | ve Selected | Ø |

- b. Enter your Policy Number.
- c. Enter your Single Occurrence amount.
- d. Enter the **Effective Date**. Click on the drop-down list to access the calendar option or type the date directly in the field. The format is mm/dd/yyyy.
- e. Enter the **Expiration Date**. Click on the drop-down list to access the calendar option or type the date directly in the field. The format is mm/dd/yyyy.
- f. Select your Insurance Carrier from the drop-down. list
- g. Enter the Address of your insurance carrier.
- h. Click **OK** to save and return to th previous page.



| Liability Insurance | | h OK Cancel |
|---|-------------------|-------------|
| Liability Insurance b POLICY NUMBER: | SINGLE OCCURRENCE | c |
| 369852 | \$1,000,000.00 | |
| EFFECTIVE DATE: | EXPIRATION DATE: | |
| 7/1/2021 | 6/30/2022 | |
| Insurance Carrier | d | e |
| INSURANCE CARRIER: | | |
| AIG Insurance Company | | |
| ADDRESS: | g | f |
| 2 Main Street, Toronto, ON, Canada | | |

i. To edit an existing liability insurance entry, click the **EDIT** symbol.

| Pro | vider I | Details Locations | Working Hours | Licensing | Liability Insurance | EAF | P Activity | 🖞 Docume | ents Knowled | $\langle \rangle$ |
|-----|---|---------------------------|---------------|-------------|-------------------------|-----|----------------|----------|-----------------|-------------------|
| New | New Liability Insurance Remove Selected | | | | | | | | | |
| | | INSURANCE CARRIER | POLICY NUMBER | ADDRESS | | Y | EFFECTIVE DATE | Y | EXPIRATION DATE | Y |
| | Ø | Allstate Insure i ompany | 654321 | | | | 4/1/2021 | | 4/1/2023 | |
| | Ø | Far ers Insurance Company | 987654 | | | | | | 5/31/2022 | |
| | Ø | AIG Insurance Company | 369852 | 2 Main Stre | et, Toronto, ON, Canada | | 7/1/2021 | | 6/30/2022 | |

j. Update the information below. Click **OK** to confirm your changes and return to the previous page.

| Liability Insurance | j — ОК Cancel |
|------------------------------------|------------------|
| | |
| | |
| | |
| 369852 | \$1,000,000.00 |
| EFFECTIVE DATE: | EXPIRATION DATE: |
| 7/1/2021 ~ | 6/30/2022 ~ |
| | |
| Insurance Carrier | |
| INSURANCE CARRIER: | |
| AIG Insurance Company | - D |
| ADDRESS: | |
| 2 Main Street, Toronto, ON, Canada | |



