



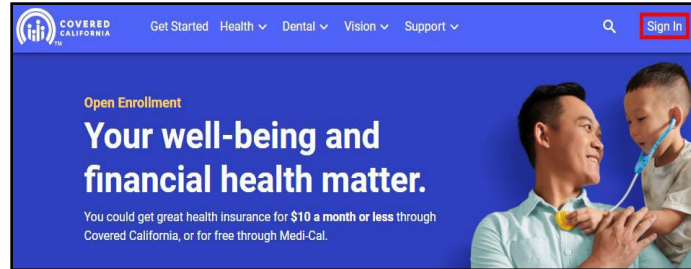
# Agency Certification Onboarding Quick Guide

## Overview

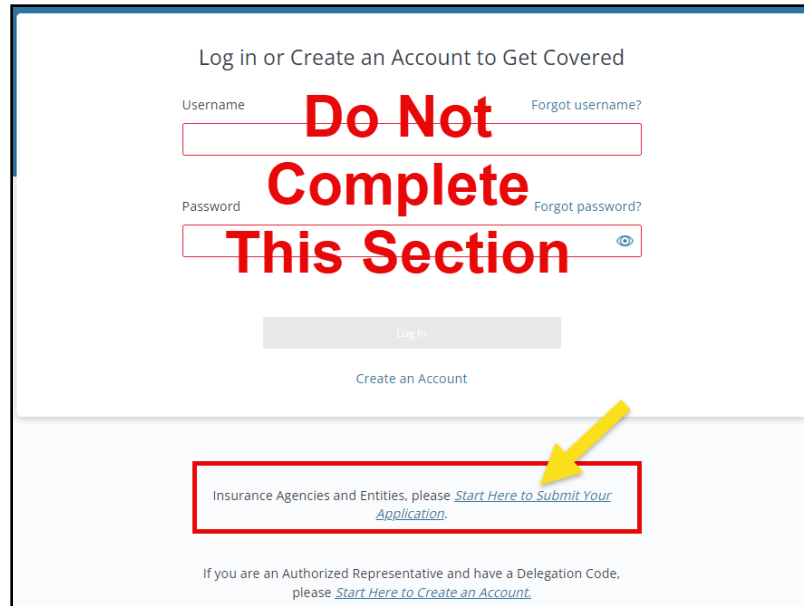
This Quick Guide provides onboarding instructions for Sole Proprietors, Corporations, and Partnerships that want to become Certified Insurance Agents with Covered California.

## Step 1: Create an Account on CoveredCA.com

- A. From the [Coveredca.com landing page](#), click **"Sign In"** upper (right corner).

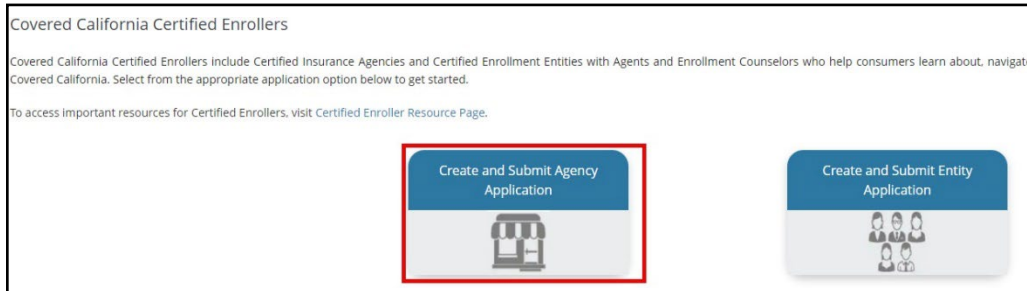


- B. From the Log in or Create an Account to Get Covered page, scroll to the bottom and click, **"Start Here to Submit Your Application."**



**Tip:** The [Log in or Create an Account to Get Covered](#) landing page is the sign in page you will use in future to access your account, Bookmark the URL for quick access.

C. Click the option for **“Create and Submit Agency Application.”**



- Complete the Agency application.
- The Agency and Agency manager statuses are now set to “Pending”.
- Allow 3-5 business days for Covered California to validate your license with the California Department of Insurance.

D. After you have completed the application, you’ll receive an email with an access code to edit the application after submission. After Covered California begins the review process, you will need to contact [AgentContracts@covered.ca.gov](mailto:AgentContracts@covered.ca.gov) to request additional changes.

E. The Covered California team will review the application and verify license(s) with the California Department of Insurance for the Accident & Health or Sickness license. If the application is for a Corporation/LLC, the business will be verified with the California Secretary of State to ensure that it is “Active” and “In Good Standing.”

F. After all verifications are completed, the Covered California team will change the status from “Pending” to “Eligible.” After Covered California has changed the profile to Eligible, the access code will no longer work.

## Step 2: Complete Online Training Through Covered California University's Learning Management System (LMS)

- A. You will receive an email from Covered California’s [Learning Management System \(LMS\)](#) with login information to access the Certified Insurance Agent Training Certification.



# Agency Certification Onboarding Quick Guide

- B. Log in to the [Learning Management System \(LMS\)](#) and select the Agency Manager Certification, located under “My Courses” within the “Certification/Recertification” folder. Complete all online training courses within the curriculum.

## Notes:

- Your email address is your LMS username.
- We strongly recommend that you use the Mozilla Firefox or Google Chrome browser.
- Once you complete the online courses, select the "Agency Manager Certification Exam" and take the exam. After completing the exam, you will be notified immediately whether you passed or failed. A passing score of 80 percent or greater is required to move forward in the certification process.
- You have 3 attempts to take the exam. The exam is open book, and we encourage you to use the Study Guides provided in the [Learning Management System \(LMS\)](#).

## Step 3: Submit Payment

Within 3-5 business days of passing the Certification Exam, you will receive an email from DocuSign® containing an envelope to pay the California Department of Insurance Endorsement Fee. **Payments received are non-refundable.**

## Step 4: Submit Agency Agreement DocuSign® Forms to Covered California

- A. Approximately 3-5 business days after your payment has been submitted, you will receive your Agency’s Monetary Agreement via DocuSign®.

To complete this step, you must:

- Upload your Errors & Omissions (E&O) Certificate
- Review and sign the Exhibits
- Review and sign the Payee Data Form STD 204 (only required when selling Covered California for Small Business)
- Review and sign the STD 213
- Complete Voter Registration Training



# Agency Certification Onboarding Quick Guide

- B. Allow 7-10 business days for the forms to be processed.

**Note:** For non-Sole Proprietor Agencies - Once the Agency's Monetary Agreement is completed, a Non – Monetary Agency Manager Agreement will be sent via DocuSign®. Both Agreements must be completed to Certify the Agency.

- C. Once your Agreement has been approved, your profile status will be changed to "Certified."

## Step 5: Finalize Your Account Creation After Your Profile Status is Changed to "Certified"

- A. You will receive 2 separate emails with an account creation access code and a link to set up your new log in credentials. Use the link and access code for initial login to the Covered California Enroller Portal.
- B. You will be prompted to create a username and password, PIN, and create security questions. **YOU MUST CREATE YOUR CREDENTIALS TO COMPLETE THE CERTIFICATION PROCESS.**

**Note:** "Certified" status allows the public to view your profile on the Covered California website. Certified Agents are permitted to assist and enroll employers (if an STD 204 was completed in your Agreement), individuals, and families seeking health insurance through Covered California.

**Important:** You must contact each Qualified Health Plans (QHPs) directly if you are not currently appointed and begin the appointment process to ensure you receive commission payments. Otherwise, you will encounter commission issues. Use the link below to contact the QHPs affiliated with Covered California: [Covered California Health, Dental and Vision Insurance companies.](#)

## Need Assistance?

If you have any questions or need assistance with this process, send an email to [AgentContracts@covered.ca.gov](mailto:AgentContracts@covered.ca.gov).