



# Agent Authentication Policy Quick Guide

## Overview

The Agent Authentication policy is the guideline used by the Covered California Service Center to confirm that a Licensed Insurance Agent is authorized to access a consumer's account.

## Agent Authentication Basics

The Agent Authentication policy has been adjusted to allow for more flexibility when Licensed Insurance Agents call Covered California for phone support. Licensed Insurance Agents are those who, per their Agent contract with Covered California, are writing business for the benefit of an agency and who may now be authenticated by the Service Center.

Once authenticated, the Service Center is authorized to:

- Release consumer enrollment information to a Licensed Insurance Agent
- Assist a Licensed Insurance Agent with application support
- Add or remove a delegate when a Licensed Insurance Agent calls with a consenting consumer primary contact on the line

To be authenticated by the Service Center, a non-delegated Licensed Insurance Agent must be contracted with Covered California and write business "for the benefit of" an agency and be associated with the agency's Federal Employer Identification Number (FEIN).

When a Licensed Insurance Agent calls, they will be asked to provide the following information:

- Agency Business Name
- Their first/last name and Agent license number
- The Agent's first/last name and Agent license number
- CalHEERS case number
- Answers to authenticate the Primary Contact on the CalHEERS case

If you have any questions on this policy, please direct them to [outreachandsales@covered.ca.gov](mailto:outreachandsales@covered.ca.gov).