

Direct Deposit Setup and Modification Quick Guide (New Agency)

An Agency Manager 2 (AM2) or Authorized Signer (AS) of a new agency can use this guide to set up, modify, or remove Direct Deposit. For agencies with both IFP and CCSB business, this direct deposit update applies only to CCSB commissions. IFP commissions will continue to be paid directly by the health plan with which you have an active agreement.

Direct Deposit Enrollment Instructions

1**Start the request during onboarding**

- The AM2 or AS initiates the request through the [Agency Onboarding Application](#).
- The onboarding application includes an opt-in for Direct Deposit for CCSB commissions.
- The request remains in queue until agency certification is complete.

2**Watch for the DocuSign email after certification**

- Once the agency is certified, the AM2 or AS receives a DocuSign envelope by email.
- DocuSign sends reminders every 3 days until the form is completed.
- The form expires 120 days after issuance if it is not completed.

3**Complete and submit the form**

- The AM2 or AS is responsible for completing and submitting the Direct Deposit form in DocuSign.

4**Wait for bank verification:**

- The form is processed and verified by the bank.

If verification is approved:

- Direct deposit is queued for agency payment.
- First payment may take 1 to 2 pay cycles, depending on bank issuance timelines. Paper warrants will be issued in interim.

If verification is rejected:

- CCSB sends the agency an email notifying them that the form was rejected, and a new form is sent via DocuSign.

Modify or Remove Direct Deposit

1**Start the request to modify/remove direct deposit:**

- IFP/CCSB agencies: Log in to the [Enroller Portal](#) and navigate to the Agency tab under Account Details to find the Direct Deposit button appears on the right side of the page and complete the form.
- CCSB Only agency: [Click here](#) to access the Direct Deposit form and begin the modification/removal.

2**Complete and submit the form:**

- The AM2 or AS is responsible for selecting the appropriate box (modify or remove). They must then complete and submit the Direct Deposit form for processing.