



# Agency Agreement & System Build Frequently Asked Questions

---

## Agency Agreement

---

### 1) Why do I need to sign a new Agreement?

To align with Covered California's new Agency contracting structure and Agency Portal all Agents are required to sign one of the following new agreements: An Agency Agreement or a Non-Monetary Agreement.

### 2) I have an Agency, who needs to sign the new Agreement?

- **The Agency Agreement** will be completed by the Agency Manager or the Authorized Signer of the Agency. The Agency Manager will be responsible for all business submitted to Covered California and the management of all Agents using that Agency's Tax ID. Current independent Agents will be required to sign an Agency Agreement as they will now be identified as an Agency of One.
- **The Non-Monetary Agreement** will be completed by Agents that are employed by agencies to associate them to the Agency and to ensure the Agent meets their contractual obligations with Covered California. No information will be collected for commission payment purposes.

### 3) If I am an independent Agent (I do not work for an Agency), do I have to sign a new Agency Agreement?

Yes, you will be required to sign a new Agency Agreement. Under Covered California's new Agency contracting structure, current independent Agents will be required to sign an Agency Agreement as they will now be identified as an Agency of One.

### 4) When do I need to sign the new Agreement?

A tentative date of July 1, 2017 has been set for distribution of the new Agency and Non-Monetary Agreements. Agencies will need to sign a new Agreement to gain access to the Agency Portal. Agents writing business for an Agency will need to sign a Non-Monetary Agreement to continue to write new business on behalf of an Agency.

### 5) How will the new Agreement be delivered?

Covered California will use the same DocuSign® process to transmit new Agreements as we have for previous amendments. Additionally, all new Agreements will be sent via DocuSign® to every Agent for review and signature.

### 6) Will Voter Registration training be required with this new Agreement?

Yes. Under federal and state law, Certified Insurance Agents are required to offer Covered California consumers assistance with registering to vote. The training must be completed on an annual basis and will be included in this new Agreement.

---

### *Agency Manager*

---

### 1) What is the designated Agency Manager's role?

The Agency Manager will act in an administrative and operational role for an Agency. They will have the ability to manage a roster of Agents and all business written by those Agents in the new Agency Portal. If you are currently managing multiple Books of Business for your Agency, the new Agency Portal will combine all of your existing Agent's Books of Business into one manageable Agency Book of Business. The Agency Manager must be a certified and licensed insurance Agent.

### 2) How do I select who will be the Agency Manager for my agency?

Covered California will reach out to Agencies who have two or more agents using the same Tax ID to select who they want to be the Agency Manager. If you are an independent Agent, you will be listed as the Agency Manager for your new Agency of One. The Agency Manager will have the ability to manage a roster of Agents and all business written by those Agents. There will only be one Agency Manager assigned to each Agency and system security restrictions will not allow for easy reassignment of the role. We recommend the Agency Manager selected by the agency should currently have an administrative and operational role in your Agency.

### 3) When will the Agency Manager role be available?

The Agency Manager role will be available when the Agency Portal is implemented. There is a **tentative** release date of late July. The Agency Portal will not be available to an Agency if an Agency Manager is not identified and the Agency has not executed the new Agency Agreement.

### 4) If I am an independent Agent (I do not work for an Agency), do I have to select an Agency Manager?

No, Covered California will not require you to select an Agency Manager. If you are an independent Agent and have no other Agents writing business for the benefit of your Agency, Covered California will list you as the Agency Manager for your Agency of One.



## Agency Agreement & System Build Frequently Asked Questions

### 5) I have an Agency, will this affect how my Agents write business?

No, your Agents will use the same Covered California portal to write business after the Agency Portal and Agency Manager Role Go-Live. Your Agents will have to sign a Non-Monetary Agreement with Covered California to continue writing business for the benefit of your Agency.