



## Agency Agreement Quick Guide for Certified Insurance Agents

### Overview

To align with Covered California's new Agency contracting structure and Agency Portal all Covered California Certified Insurance Agents must sign one of the following new Agreements: An Agency Agreement or a Non-Monetary Agreement. The new Agreements are being released by Covered California July, 2017.

- **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.

### How to Complete the new Agreement

An email will be sent from DocuSign® to all Covered California agents **before July 28, 2017** with the subject line "Covered California NEW AGENCY AGREEMENT." DocuSign® will automatically resend notifications to Agents every three days until they have submitted a response with the package expiring 45 days from the initial date sent.

All fields displayed in the DocuSign® Agreement have been pre-populated with information Covered California currently has on file. ***Prior to taking action ensure to perform a complete review of the new Agreement, checking for each of the items listed below:***

- **Mailing address for Agency Agreement, not Non-Monetary Agreement:**
  - If commissions are paid to an Agency: ensure the address listed reflects the legal business address of the agency that is registered with the California Department of Insurance or California Secretary of State.
  - If commissions are paid to a Sole Proprietor: ensure the address listed reflects the mailing address Covered California currently has on file.
  - ***If the Mailing Address need to be updated, DECLINE the Agreement:***
    - Copy and paste the following status: **Incorrect Address – (insert new address) – into the declined pop-up window that displays**
    - Covered California will verify and send a revised Agreement within 2-4 weeks
- **Physical (Local) address:**
  - The physical address or "[Find Local Help](#)" address will not be displayed on your Agreement. The [Agency Manager](#) will have added functionality for Agencies to add or change subsite locations for all of their Agents associated with them.
- **Phone number or Email:**
  - ***If either need to be updated, DO NOT decline the Agreement.***
  - Complete the Agreement and then contact our AgentContracts@covered.ca.gov and be sure to include your license number. Provide an updated phone number and/or email address and your



## Agency Agreement Quick Guide for Certified Insurance Agents

- **Payment Type:**

- If you are currently in our system as a Sole Proprietor, and you would like to have commissions paid to an agency **DECLINE the Agreement**.
  - Copy and paste the following text into the comments: **Payment type requires update – [insert the Agency Legal Business Name, FEIN, legal mailing address of the agency and the Agent’s physical address].**
- If you are currently in our system associated with an Agency, and you would like to have commissions paid to a Sole Proprietor **DECLINE the Agreement**.
  - Copy and paste the following status: **Payment type requires update – [insert Agency’s new mailing address, Tax ID, phone, and email, if different than what is currently displayed].**

### Declined Agreements

Please provide detailed corrected information using procedures in the bullets above. All declined agreements will be reviewed and a revised Agreement will be sent for review and signature. If any further clarification is required for drafting the revised Agreement, Covered California will notify you via email. Once the Agreement has been revised with the changes indicated, a new link will be emailed to the agent with the revised Agreement.

### Signed Agreements

After Covered California receives a signed DocuSign® Agreement it is routed for review and processing. Once the Agreement is approved, DocuSign® automatically notifies the agent that the review was completed.

### Voter Registration

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.

Complete the Voter Registration training now by clicking [here](#). Covered California’s [Voter Registration Guide](#) includes everything an agent needs to know to assist consumers with Voter Registration whether [in-person](#) or [over the phone](#). Once training has been completed, Agents self-attest to the completion of the training upon signing the amended Agent Agreement via DocuSign®.

### Terminated Agents

There is the option to reinstate your certification by sending a request for re-certification to [AgentContracts@covered.ca.gov](mailto:AgentContracts@covered.ca.gov). You may request to become eligible for certification. If any additional information is needed Covered California will contact the agent via email, and a new Agreement will be generated and sent via DocuSign®. The Agent’s Book of Business will not be restored after their profile is terminated.