



Certification Checklist.

Account Creation and Certification Training

- Contact the agency to begin the agent account-creation process.
- The agency manager creates a new agent profile within the agency portal
 - Allow three to five business days for the new agent’s license to be validated with the California Department of Insurance.
 - The new agent will receive an email from Covered California’s Learning Management System (LMS) with login and password information to access the Agency Certification Training.
- The new agent must login to LMS at <https://learning.coveredca.com/#/login> and select the CoveredCalifornia Certified Insurance Agent Training located under “My Courses” within the "Certification/Recertification" folder. Complete all online courses within the curriculum.
 - Once the online courses are completed, the new Agent will select the “Certified Insurance Agent Certification Exam”.
 - A passing score of 80% or better is required to move forward in the certification process.

Submission of Payment/Agent Agreement

- The new agent will receive an email from DocuSign® to pay the Endorsement Fee.
- Once the fee has been processed, the Non-Monetary Agreement will be sent via DocuSign®. The Agent must review and sign Exhibits A-E, and complete Voter Registration Training.

Note: You must establish and remain properly appointed directly with all the applicable carriers to avoid commission issues while you are Certified with Covered California. Please use the link below for information on how to contact the carriers:

[Covered California Health, Dental, and Vision insurance companies.](#)

Complete Account Creation Process

- Once the new agent completes the entire certification process, Covered California updates their certification status in CalHEERS to “Certified”.
- The agency will receive a Delegation Code and provide to the new agent.
- The new agent will [complete the Account Creation process](#) through CoveredCA.com by selecting “Create Account” under the Certified Insurance Agent box and provide the required information. The following information associated the agent with the agency:
 - Agency’s Legal Business Name
 - The Delegation Code from the Agency
 - The new Agents license number
- Bookmark the URL and create/retain the PIN/username/password.
- The agent will now be “Certified”.
- To complete the individual Agent Account Creation process, the agent must login using their new User ID and password. This final step allows the new agent to be found on the “Agent Finder” page on CoveredCA.com.

You are now ready to enroll consumers in Covered California!