



Covered California Small Business (CCSB) Agency and Agent Certification Onboarding Quick Guide

Overview

This Quick Guide provides onboarding instructions for Sole Proprietors, Corporations, Partnerships, and Downline Agents that want to become Certified Insurance Agents with Covered California for Small Business.

Agency Certification Instructions

If you are an Agency, [click here](#) to start and complete a new Agency Application.

IFP/CCSB Agency Certification Instructions

If you are interested in certifying to provide enrollment assistance for Individual and Family Plans and Covered California for Small Business (CCSB) plans, [click here](#) to start and complete your application.

Please Note: During the application process, you'll be prompted with the question, "What does your Agency Plan to sell?" – ensure that you select the "Individual/Family and Covered California for Small Business" dropdown option.

Downline Agent Certification Instructions

Step 1: CCSB Only Downline Agent Certification Onboarding Steps.

- A. [Click here](#) to start and complete the CCSB Only Certification Onboarding process for downlines Agent(s).
 - **Step 1 - CCSB Only Agency Information:** Enter the Agency Information details (Legal Business Name, primary contact’s email address, and FEIN/SSN).
 - **Step 2 - The Agency details** (legal name and FEIN/SSN) will carry over to the respective areas. Downline Agents must complete the remainder of the information using their information (not the Agency).

Important Note: The main stipulation for the application is that the Downline Agent complete the application using their personal details. However, it also requires the Agency’s Legal Business Name and FEIN/SSN.

CCSB-Only Agency Information Step 1

Please enter the below information to identify your CCSB-Only Agency prior to adding a downline Agent.

* Legal Business Name: ABC Insurance

* Monetary Contract Holder Email: victoria368496@example.org

FEIN/SSN: 99008888

CCSB-Only Agent Level 1 Information Step 2

* First Name: []

* Last Name: []

Enroller License Number: []

Enroller License Expiration Date: []

Legal Business Name: ABC Insurance

FEIN/SSN: 99008888

* Individual Email: []

* Confirm Individual Email: []

* Phone: []

* Preferred Method of Communication: --None--

Alternate Phone: []

Business Mailing Address: []

Address Line 1: []

Address Line 2: []

City: []

State: CA

ZIP Code: []

Downline's Business Address



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Processing Information

- After you submit the application and Covered California starts the review process, you will need to contact AgentContracts@covered.ca.gov if you need to make changes to your application.
- Allow 1-2 business days for Covered California to review the application and verify license with the California Department of Insurance.
- After all verifications are completed, you will receive an email with login instructions to access the Learning Management System training modules.

Step 2: Complete Online Training

You will receive an email from Covered California's [Learning Management System \(LMS\)](#) with login information to access the Covered California for Small Business Certification Training.

- A. Log in to the [Learning Management System \(LMS\)](#) and select the "2024-25 CCSB-Certification Only", located under "My Courses" within the "Certification/Recertification" folder.

Reminders/Tips:

- Your email address is your LMS username.
- We strongly recommend that you use the Mozilla Firefox or Google Chrome browser.
- There is only **ONE** course that needs to be completed. Other courses displayed are optional and not required for the certification process.
- Upon completing the hour-long course, you can print and/or save the certificate for your records.

Step 3: Submit Payment

Within two business days of training completion, you will receive an email from DocuSign® containing an envelope to pay the California Department of Insurance Endorsement Fee of \$76 dollars. **Payments received are non-refundable.**

Step 4: Submit Agency Agreement DocuSign® Forms to Covered California

Within 3-5 business days of payment submission, you will receive your Non-Monetary Agreement via DocuSign®.

Note: Downline Agent only needs to sign a Non-Monetary agreement which includes reviewing the Exhibits.



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- A. Allow 7-10 business days for the forms to be processed.
- B. Upon the completion of the DocuSign forms by the Agent, Covered California will review the submitted Agreement. You will be contacted if additional information is needed. Otherwise, Covered California will send you a Welcome Message to inform you that you were certified and provide you with additional resources to help you sell CCSB Plans.

Step 5: Finalize Your Account Creation After Your Profile Status is Changed to “Certified”

Within 5-7 business days of your certification, you will receive an email from donotreply@myccsb.com which will include an account link and temporary password to register for the MyCCSB portal.

- A. Click the account link and register in the MyCCSB portal. The link will expire within three (3) days. If you do not see the email in your inbox, please check your spam or junk folder.
- B. If you are unable to access the link within three (3) days, send an email to ccsbeligibility@covered.ca.gov to request a new link and password.

Note: Covered California oversees the commission schedule payments for Small Business. Direct Deposit is currently unavailable as a payment form with CCSB.

Resources

Consult the [CCSB Agent Agreements and Compensation Structure](#) page to review the [CCSB Agency Agreement](#) and [CCSB Non-Monetary Agreement](#) for definitions of key contract roles such as authorized signer, agency manager, and downline agent.

Need Assistance?

- For contracting questions, send an email to Agentcontracts@covered.ca.gov.
- For LMS training technical questions, send an email to cculearning@covered.ca.gov.
- For questions regarding commissions, contact the CCSB Service Center at (855) 777-6782. Reference the [CCSB Service Center Information](#) webpage for more contact and servicing information.