



How to become a CLEVER CARE Certified Broker/Agent

A. Contracting

To be authorized to sell CLEVER CARE's products, you must be affiliated with an FMO that contracts with CLEVER CARE.

If you have questions about CLEVER CARE's contracted FMOs, email: Broker@ccmapd.com

B. Required Documents

- **License:** Current CA State Accident & Health Insurance license (must not expire within 45 days of contracting).
- **Signed W-9**
- **Signed Contracts:** MA Producer Agreement and Business Associate Agreement
- **Errors & Omissions (E&O)**

Applicants must attest to CLEVER CARE that E&O coverage is current (must not expire within 45 days of contracting). Your minimum E&O policy must be written for \$1,000,000 per occurrence and \$1,000,000 aggregate limit. After onboarding, agents are required to continue to maintain active E&O coverage.

C. Product Certification

STEP 1: Submit all your documents as shown below:

- ✓ Valid California Accident & Health Insurance License
- ✓ Signed Contracts: MA Producer Agreement and Business Associate Agreement
- ✓ Signed W-9 form
- ✓ Valid E&O Insurance Policy
- ✓ Current year AHIP Certificate

STEP 2: Clever Care Product Certification

Once we have received and verified all the documents, we will send you a link to complete the Clever Care Product Certification. ***You must get a score of 85% or more to pass.***

STEP 3: Ready-to-Sell Notification

Once you have completed all certification requirements, you will receive CLEVER CARE's "You are Ready to Sell" email.

You are now certified to sell CLEVER CARE products!