

Agency License & Appointment Procedures

In order for an Association/Chamber to become eligible to receive the monthly service fees of \$1.20 per employee per month (pepm) for the group product the Association/Chamber must be **licensed** with the **State of Virginia** and **appointed** with **Optima Health**.

Below you will find the steps that are necessary to complete the following:

1. Completing the online application to become licensed as an agency
2. Completing the paperwork to become appointed with Optima Health
3. Tracking the status of your licensing process online

1. Completing the online application (Click Next after each bullet)

- To access the online agency license, go to www.sircon.com/virginia
- In the left hand column, click on **"Apply for License"**.
- **"License Applications"** - On the line that says **"Submit Resident Application"**, click on **"Firm"**.
- **Firm Resident License Application** - Complete all of the required information
- **Processing Method** - Be sure to click the button beside **"Credit Card/Electronic Check Submission"**. There is a fee of \$28.60 that is required. Payment can be made using VISA, MASTERCARD, AMEX and electronic checks.
- **License Information** - Click on "Producer" and click whether the Association has been previously licensed.
- **Qualification Code** - Click on **"Health"**.
- Complete all of the demographic information.
- Complete the **"Owners and Officers"** information. You are applying for an **"Agency" license**. For this section, per the State Corporation Commission, it is only necessary to supply the information as it pertains to the name of the President or Executive Director of the Association.
- **Designated/Responsible Licensed Producers** – Complete the required fields. This part can be discussed with the Endorsed Agent as you will need someone with a license to assist you in getting a license for your organization.
- **Uniform Background Questions – Agency** – Answer questions 1-7.
- **Attestation Information for State of Virginia: Producer** – Click on the **"I Agree"** button.
- **Additional State Fee Information for State of Virginia : Producer** – There is a required \$15.00 State of Virginia fee (one of two other fees).
- **License Application Summary** – This is where you will see the State Fee (\$15.00), the Sircon Service Fee (\$12.50) and the Processing Fee (\$1.45) = \$28.95. Be sure to click the box that states that you understand that the fees are non-refundable. Also be sure to have your email address keyed in the box for future notifications.
- **Payment Details** – Complete the required information.
- Within a few weeks, you will receive an email from the State Corporation Commission that

contains your license #. Follow the instructions in the email that explain how to print a copy of your agency license. Be sure to print the license within 30 days of receiving the email to avoid a \$5.00 fee.

2. Completing the paperwork to become appointed with Optima Health

- Complete the [Optima Health Substitute Form W-9 \(SF-W9\)](#), **Complete Section A only.**

After you have printed the agency license and you have completed the W-9 form, please fax a copy of both documents to Suzanne Braxton at (757) 687-6135.

3. Tracking the status of your licensing process online

- Log on to www.scc.virginia.gov
- Click on the header labeled **“Insurance”**
- Click on **“Bureau of Insurance”**
- Under the **“Producers”** header, click on **“Producer Lookup”**
- Select **“Business Entity (Agency)”**
- Select **“All”**
- Key in the **“Agency Name”**
- Click on **“Search”**
- If your paperwork has been processed you will see an area for you to click on **“Select”** and it will provide you with the producer details.
- If a statement appears saying **“No Results Were Found with the Selected Criteria”** you may want to call the State Corporation Commission to see if they are in receipt of your documents.



If you have any additional questions, please feel free to contact:

Virginia State Corporation Commission
Bureau of Insurance
P.O. Box 1157
Richmond, VA 23218
(804) 371-9631

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