

Curriculum and Officer Review Bureau - Education Section

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 Sacramento, CA 95814-4309
 Information (916) 492-3064
 www.insurance.ca.gov

Instructions: <ul style="list-style-type: none"> ▪ This form must be completed for each course submitted for approval. ▪ A completed application with the proper attachments and filing fee must be received by the Commissioner at least 30 days prior to the first course presentation. ▪ The following course category types must include the specific checklist items noted on pages 2 through 4 of this application: Ethics Training, Annuity Training (e.g., eight-hour and four-hour courses), Independent and Public Adjuster, Life Settlement Broker, California Eight-Hour Long-Term Care, Homeowners' Insurance Valuation, General, or Business Management. Please note, the course application will not be processed unless the checklist item is attached. 		Department Use Only: Course #: _____ Approval period: _____ Credit Hours: _____ Category code: _____	
First course presentation date:		Provider Number:	
Provider Name:		Phone Number: ()	
Address:			
Street	City	State	Zip Code
Course Title*:			
Check one course type: <input type="checkbox"/> Prelicensing Education <input type="checkbox"/> Continuing Education		Statutory Requirement: If this application is for continuing education, is this course intended to meet any statutory requirements? <input type="checkbox"/> No <input type="checkbox"/> Yes (if yes, indicate requirement below) <ul style="list-style-type: none"> <input type="checkbox"/> California Long-Term Care** <input type="checkbox"/> 24-Hour Care Coverage <input type="checkbox"/> California Partnership for Long-Term Care <input type="checkbox"/> Annuity** <input type="checkbox"/> Homeowners' Insurance Valuation** <input type="checkbox"/> Ethics** <input type="checkbox"/> Life Settlement** <input type="checkbox"/> 2025 Life Insurance 4-Hour Course** 	
Number of Prelicensing Education hours requested:			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12-hour	20-hour	32-hour	40-hour
Code and			
Ethics			
Instruction Method: **			
Prelicensing Education		Continuing Education	
Contact (Interactive):		Contact (Interactive):	
<input type="checkbox"/> Classroom		<input type="checkbox"/> Seminar	
		<input type="checkbox"/> Workshop/Conference	
Non-Contact (Internet Delivery):		<input type="checkbox"/> Classroom/Lecture	
<input type="checkbox"/> Online Prelicensing		<input type="checkbox"/> Teleconference (monitored)	
		<input type="checkbox"/> Webinar (monitored)	
		<input type="checkbox"/> Other _____	
		<input type="checkbox"/> Self-Directed (Non-Interactive)	
		<input type="checkbox"/> Correspondence/Hard Text Book	
		<input type="checkbox"/> Portable Document Format (PDF) Text	
		<input type="checkbox"/> EBook	
		<input type="checkbox"/> Compact Disk (CD)	
		<input type="checkbox"/> Digital Versatile Disc (DVD)	
		<input type="checkbox"/> Audio File	
		<input type="checkbox"/> Video File	
		<input type="checkbox"/> Other: _____	
		Online Continuing Education (Internet Delivery)	
		<input type="checkbox"/> Internet	
		<input type="checkbox"/> Other: _____	
Category type for course credit (check one):			
<input type="checkbox"/> Property	<input type="checkbox"/> Casualty	<input type="checkbox"/> Property and Casualty	<input type="checkbox"/> Personal Lines
<input type="checkbox"/> Life	<input type="checkbox"/> Accident and Health or Sickness	<input type="checkbox"/> Life, and Accident and Health or Sickness	<input type="checkbox"/> Limited Lines Automobile
<input type="checkbox"/> Independent Insurance Adjuster**	<input type="checkbox"/> Public Adjuster**	<input type="checkbox"/> Independent and Public Adjuster**	<input type="checkbox"/> Life Settlement**
<input type="checkbox"/> General**	<input type="checkbox"/> Business Management**		

Is this course part of a designation program? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, which program?	
Number of continuing education course credit hours requested (Note: courses must be at least one hour and partial hours will not be accepted):	Include on Commissioner's list of courses open to public? <input type="checkbox"/> Yes <input type="checkbox"/> No
CERTIFICATION: I certify under penalty of perjury that I have read and understand the information and requirements contained in this application, that all statements are true and nothing has been withheld which would influence a complete evaluation of this course. <input type="checkbox"/> Agree	
Printed Name of Provider Director	Date
Email Address	
For Commission use only: _____ COURSE APPROVED _____ COURSE NOT APPROVED	
Comments/Calculations:	
By: _____ Education Unit Staff	

*Advertising and course materials must use this exact title. Courses based on another provider's material must be approved by that provider and must use same name.

** See Required Attachment Checklist on pages 2 through 4 of this application.

REQUIRED ATTACHMENT CHECKLIST:

Instruction Methods:

- A. Contact (Interactive) Course** as defined in California Code of Regulations, Title 10, section 2186.1(e)(1):
1. ___ A detailed statement on how the course is relevant to insurance topics and insurance products.
 2. ___ A detailed outline of approximately one page per hour of instruction including the time each topic is being presented.
 3. ___ A copy of all materials presented to each student if a detailed outline is not submitted with application.
 4. ___ An agenda showing the beginning and ending times, breaks, and time allotted for examinations, if applicable.
 5. ___ A completed Class Presentation Schedule form for each presentation.
 6. ___ A current authorization letter from the author or publisher if using another vendor's source material as the basis for the course.
 7. ___ For a webinar, teleconference, or other similar technological medium, demonstrate how the instructor knows when a student has signed in and out of the course, how students are monitored and their active participation time tracked, and how communication between instructor and student is achieved.
 8. ___ For a preclicensing course only, California preclicensing educational objectives are to include the page and paragraph-references to the provider course material for every line topic.
- B. Non-Contact (Non-Interactive) – Self-Directed Continuing Education Course** as defined in California Code of Regulations, Title 10, section 2186.1(e)(2)(B):
1. ___ A detailed statement on how the course is relevant to insurance topics and insurance products.
 2. ___ A copy of the audio file, video file, computer diskette, DVD, CD, EBook or hardcopy or pdf text book for the course or a copy of the text book cover, copyright page and table of contents if using another vendor's pre-approved material/book.
 3. ___ A final examination with at least three questions (not in chapter/section order) for each hour of credit. A detailed statement on how provider will ensure the student enrolled in the course is the same individual who is completing the final course examination as defined in California Code of Regulations, Title 10, section 2188.2(j).
 4. ___ Answers to all examination questions with page and paragraph referencing to the source material.
 5. ___ A current authorization letter from the author or publisher if using another vendor's source material.
 6. ___ A copy of the course and examination instruction sheet sent to students detailing the length of time the student is allowed to complete the course, how the course completion date is determined, what constitutes a passing grade, and procedures in event student fails an examination.
 7. ___ A detailed statement on who maintains control of the answer key and how the integrity of the examination is maintained (see Cal. Code of Regs. Title 10, section 2188.2[a][7]).
 8. ___ A document listing the total word count (4,600 words for each hour of credit) for courses intended to be read or the run time for courses not intended to be read in audio and/or video format (see Code of Regs. Title 10, section 2188.2[j][1]).
 9. ___ Demonstrate that reasonable measures have been taken to prevent student from access to course examination before review of the course material as defined in Section 2186.1(e)(2)(B)1. and 2. of Title 10 of the CCR. Provide Internet address, log-on and password for course review.

- C. Non-Contact (Internet Delivery) – Online Continuing Education Course** as defined in California Code of Regulations, Title 10, section 2186.1(e)(2)(C)
1. ___ A detailed statement on how the course is relevant to insurance topics and insurance products.
 2. ___ A final examination with at least three questions (not in chapter/section order) for each hour of credit. A detailed statement on how provider will ensure student enrolled in the course is the same individual who is completing the final examination as defined in California Code of Regulations, Title 10, section 2188.2(j).
 3. ___ Answers to all examination and review questions with section/chapter and screen referencing to the provider course material.
 4. ___ Internet address, log-on and password for course review.
 5. ___ Demonstrated compliance with California Code of Regulations, Title 10, section 2188.2(k).
 6. ___ A document listing either the total word count (4,600 words for each hour of credit) or that the credit hour is based on the run time of the course as stated in (Section 2188.2(j)(2)).
 7. ___ A current authorization letter from the author or publisher if using another vendor's source material.
 8. ___ A copy of the course and examination instructions to students detailing the length of time the student is allowed to complete the course, how the course completion date is determined, what constitutes a passing grade, and procedures in the event a student fails an examination.
 9. ___ A detailed statement on who maintains control of the answer key and how the integrity of the examination is maintained.
 10. ___ Demonstrate that reasonable measures have been taken to prevent student access to the course examination before enrollment in and completion of the course materials as defined in California Code of Regulations, Title 10, section 2186.1(e)(2)(C)
 11. ___ Internet courses must include the provider's Internet address, security measures, log-on and password to allow for Commissioner to review the course(s). Answers to examination questions must reference Section/chapter and screen for answer source.
- D. Non-Contact (Internet Delivery) – Online Prelicensing Course** as defined in California Code of Regulations, Title 10, section 2186.1(e)(2)(A):
1. ___ A detailed statement on how the course is relevant to insurance topics and insurance products.
 2. ___ A copy of the applicable California prelicensing educational objectives with section/chapter and screen references to the provider course material for every line topic.
 3. ___ Internet address, log-on and password for course review.
 4. ___ Demonstrated compliance with California Code of Regulations, Title 10, sections 2188.2.5 and 2188.5.5.

Course Category Type(s):

- E. Ethics Training Course** as defined in California Insurance Code section 1749.1(a):
Attach separate sheet with responses to each of the eight statements listed below:
1. ___ Describe how this course contributes to an agent's understanding of his/her ethical responsibilities.
 2. ___ Point out where in the course examples of "good" licensee conduct are given, as well as examples of "bad" licensee conduct.
 3. ___ Explain how this course contributes to an agent's understanding of the complexities of ethical decision-making within the context of insurance transactions.
 4. ___ Describe where in the coursework an agent may find tools to help the agent identify, prevent, and resolve ethical dilemmas that arise in the course of conducting insurance business.
 5. ___ Explain how the content of this course contributes to the producers understanding of proper vs. improper, honest vs. dishonest behavior.
 6. ___ Provide two samples of licensee conduct you will use in this course to contrast ethical with unethical behavior and details supporting the judgment of ethical or unethical behavior.
 7. ___ Explain how this course demonstrates to whom the licensee "owes" an ethical responsibility in this course and how this course will help the licensee understand his or her ethical responsibilities to such an entity.
 8. ___ Explain how this course helps the licensee distinguish between legal and ethical behavior and legal but unethical behavior.
- F. Annuity Training Course** as defined in California Insurance Code section 1749.8:
Eight-Hour Annuity Training Course:
1. ___ A copy of the Eight-Hour Annuity Training Outline, approved by the Commissioner, with page and paragraph-references to the provider course material for every line topic.
- Four-Hour Annuity Training Course:**
1. ___ A copy of the selected Four-Hour Annuity Training Course Specific Topic Outline, approved by the Commissioner, with page and paragraph-references to the provider's course material for every line topic.
- Independent Adjuster and/or Public Adjuster Course** (attach separate sheet with responses to each of the four statements listed below) as defined in California Insurance Code section 14090.1 and/or 15059.1.

1. ___ Describe how this course contributes to an independent/public insurance adjuster's understanding of insurance coverage and claims, how the course relates to the adjusting of insurance claims, and how adjuster competence may be improved by completion of the course.
2. ___ Describe how this course contributes to an independent/public insurance adjuster's understanding of insurance statutes and rules, how the course relates to the adjusting of insurance claims, and how adjuster competence may be improved by completion of the course.
3. ___ Describe how this course contributes to an independent/public insurance adjuster's understanding of specific topics (i.e., construction, commercial, residential), how the course relates to the adjusting of insurance claims, and how adjuster competence may be improved by the completion of the course.
4. ___ Describe how this course contributes to an independent/public insurance adjuster's understanding of valuation, how the course relates to the adjusting of insurance claims, and how adjuster competence may be improved by completion of this course.

H. Life Settlement Broker Course as defined in California Insurance Code section 10113.2:

1. ___ A copy of the 15-Hour Life Settlement Broker Outline, approved by the Commissioner, with page and paragraph-references to the provider course material for every line topic.

I. California Eight-Hour Long-Term Care Course as defined in California Insurance Code section 10234.93(a)(4):

1. ___ A copy of the Eight-Hour Mandatory Long-Term Care Course Outline, approved by the Commissioner, with page and paragraph-references to the provider course material for every line topic.

J. Homeowners' Insurance Valuation Course as defined in California Insurance Code section 1749.85 and California Code of Regulations, Title 10, section 2188.65:

1. ___ A copy of the Homeowners' Insurance Valuation course curriculum, approved by the Commissioner, with page and paragraph-references to the provider course material for every line topic.

K. 2025 Life Insurance Policies Four-Hour Course as defined in California Insurance Code section 1749.81(a):

1. ___ A copy of the 2025 Life Insurance Policies Four-Hour Course curriculum, approved by the Commissioner, with page and paragraph-references to the provider course material for every line topic.

L. General Category Course:

1. ___ A detailed statement on how the course is equally relevant to a combination of the following license types: property broker-agent (PR), casualty broker-agent (CA), personal lines broker-agent (PL), limited lines automobile agent (AU), life agent (LO) and accident and health agent or sickness (AH). Specifically, the provider is to describe in the course outline or material how the licensee that holds the specific license types (e.g., a licensee that holds PR, CA and AH or a PR, CA, LO and AH or PL, LO and AHS license types) is enriched and is provided a more thorough education by completing a general category type course. **Please note**, if the course topics are specific to one license type, the Commissioner will give the course the appropriate course category code.

PLEASE SEND THIS COMPLETED APPLICATION ALONG WITH THE PROPER ATTACHMENTS AND FILING FEE TO:

California Department of Insurance
Curriculum and Officer Review Bureau - Education Unit
P.O. Box 311
Sacramento, CA 95812-0311

Filing fees:
\$41 per Continuing Education Course
\$83 per Prelicensing Education Course

Make check payable to: California Department of Insurance

Course applications must be received in this office at least 30 days prior to the first course presentation date. Course advertisements for pending courses must clearly state that the course has been submitted and is pending approval, if the course application is complete and submitted within the appropriate time frame. EDUCATION UNIT INQUIRIES: (916) 492-3064