

Do NOT refer CA Insurance Test takers to the board. CSRs should Email cstevens@psionline.com with any concern.

DO NOT release Cecilia's email to Test takers. CSRs must follow up with her directly.

Test takers who call about flu, cough, or COVID symptoms and are beyond the 48 hrs rescheduling window should be rescheduled 14 days out.

Test takers who have an issue that PSI cannot resolve should be referred to the follow number for Test takerl:

Test takerl's Examination Unit: (916) 492-3570

*****When a Test taker calls in and mentions COVID, we are to waive the 48-hour rule and cancel the Test taker's exam.**

	Test takers who previously passed an insurance exam and allowed their license to expire and need to retake the exam, email estech@psionline.com ask that a pending payment file be created. Mention that the Test taker must retake the exam.
Full Client Name	California Department of Insurance
Acronym	CDI
File Type	Open
Platform	UCS 2
ID Type	SSN
Address	Producer Licensing Bureau 320 Capitol Mall, Sacramento, CA 95814
Telephone	(800) 967-9331
Fax	N/A
Web address	www.insurance.ca.gov
PSI Customer Service #	(833) 518-7456
PSI Exam Browser Link	https://test-takers.psiexams.com/cadi
Program	Program will be converting from Atlas to UCS
Exam Titles - Language/Testing Time	<ul style="list-style-type: none"> •Accident and Health or Sickness - English & Spanish/105 minutes •Bail Examination - English/120 minutes •Casualty - English/98 minutes •Commercial Insurance Examination - English/98 minutes •Independent Insurance Adjuster Examination - English/158 minutes •Life and Disability Insurance Analyst Examination - English/210 minutes •Life Limited to the Payment of Funeral and Burial Expenses Examination - English & Spanish/135 minutes •Life, Accident and Health or Sickness - English & Spanish/195 minutes •Life - English & Spanish/105 minutes •Limited Lines Automobile Examination - English/105 minutes •Personal Lines - English/135 minutes •Property and Casualty - English/195 minutes •Property - English/98 minutes •Public Insurance Adjuster Examination - English/165 minutes
# of Items	Not available
Pretest Items	In addition, as a part of the examination review, California Department of Insurance may include questions that need to be validated on your examination. An additional 10 to 15 minutes may be added to your examination to allow time for you to respond to these questions. These questions will not count towards your final score.
Splitting Portions	Not applicable as these are 1-portion exams.
Exam Type	CA Department of Insurance
Notes	Incorrect SSN on License: The Test taker will have to use the code on the score report. Once they receive their license they will then have to correct the social with the board. (We can correct on our end for future use) California Customer (800) 967-9331
Application Processing	Application Processor applies exam payments if they are mailed or faxed in.
Processing Time	Mail – up to 10 business days; Fax – up to 4 business days
Application Processor	CA. ApplicationProcessor@psionline.com
Name/Address Changes	Minor spelling or typos can be done by a CSR or proctor. Proctor should follow up with an incident report that Cecilia will send to the board. Changes due to marriage or divorce should send documentation to Application Processore or supervisor. (Example: Divorce Decree for divorce, Marriage License for marriage)
Languages Available	Refer to Exam Titles
Eligibility Criteria	No prerequisites required
Eligibility Period	Pursuant to section 1676(a) of the California Insurance Code, examinations are valid for one year from the date the examination was passed.
Payment Payable to	PSI
Fees	Refer to Fees in Atlas
	Make sure you check ATLAS and that it properly reflects the requested site type. Remember to manually charge the \$33 convenience fee when changing from a Test takerl site to a PSI site.
Payment Type	Payment of fees may be made by credit card (Visa, MasterCard, American Express or Discover), money order, company check or cashier's check. Make check or money order payable to PSI and indicate your name on it to ensure that your fees are properly assigned. CASH AND PERSONAL CHECKS ARE NOT ACCEPTED.
Reschedule Rules	You may cancel and reschedule an examination appointment without forfeiting your fee if your cancellation notice is received two days prior to the scheduled examination date.

	<p>Retake Rules: Effective 1/1/17 Test taker may make 10 attempts in a 12-month period. After 10 attempts, CA must wait 1 year before examining again.</p> <p>How to Calculate the Number of Exams Taken The calculation for determining the number of exams taken is based on exam type. For instance, an exam Test taker who is in the process of taking both the life-only exam and the personal lines exam would not have their exams combined but counted separately (e.g., the count for this exam Test taker would be five times for the life-only exam and four times for the personal lines exam in the same 12-month period. In this example, the exam Test taker would not be counted as taking nine exams towards the ten exam limit).</p> <p>However, combination exams which include one of the license types of a single exam taken in the same 12-month period are considered to be the same exam type when determining the number of exams taken. For instance, an exam Test taker taking the life-only exam eight times and a combination life and accident/health exam two times in the same 12-month period will have reached the ten exam limit for taking any of California Department of Insurance's life agent exams, including life limited to funeral and burial expenses.</p>
ADA/Exam Accommodation Approval	<p>All PSI examination centers are equipped to provide access in accordance with the Americans with Disabilities Act (ADA) of 1990, and exam accommodations will be made in meeting a Test taker's needs.</p> <p>A Test taker with a disability or a Test taker who would otherwise have difficulty taking the examination must follow the link and instructions on the Exam Accommodations Request page at the end of the Test taker Information Bulletin.</p> <p>You are required to submit documentation from the medical authority or learning institution that rendered a diagnosis. Verification must be uploaded to PSI on the letterhead stationery of the authority or specialist and include the following:</p> <ul style="list-style-type: none"> • Description of the disability and limitations related to testing • Recommended accommodation/modification • Name, title and telephone number of the medical authority or specialist • Original signature of the medical authority or specialist
ESL Accommodations	<p>Test takers seeking ESL accommodations can be given 30 minutes extra time on their exam. They will need to submit a letter on company letterhead from their English instructor or Sponsoring company certifying that English is not the Test taker's primary language</p>
Remote Proctored testing	<p>Test taker may test Remote Proctored</p>
Out of State Testing	<p>Test taker may test at any of PSI owned examination sites outside of California.</p>
PSI California Testing Sites	<p>AGOURA HILLS ANAHEIM ATASCADERO BAKERSFIELD BURBANK CARSON DIAMOND BAR EL MONTE - SANTA FE SPRINGS FRESNO HAYWARD LAGUNA HILLS LAWNDALE REDDING RIVERSIDE SACRAMENTO SAN DIEGO SAN FRANCISCO SANTA ROSA SANTA CLARA VENTURA VISALIA WALNUT CREEK</p> <p>California Department of Insurance SITE: LOS ANGELES (PSI's convenience fee is not charged at this site)</p>
Paper/Pencil	<p>Yes</p>

Bring to test center	<p>You must provide one form of identification. The identification must be a VALID form of government-issued identification with photo and signature (Driver's license from any state, California identification card*, passport, passport card, military ID (not accepted for Remote Proctored exams), Employment Authorization card or Permanent Resident card). A Veteran Health Identification Card (VHID) with a photo. The identification provided must match the name given during registration.</p> <p>*Notes:</p> <ul style="list-style-type: none"> • An out-of-state ID card is NOT acceptable. • California does allow Test takers to bring in their expired ID along with the paper extension. The names and license numbers must match both the expired ID and the paper extension. <p>If you cannot provide the required identification, you must call (800) 733-9267 at least three weeks prior to your scheduled appointment to arrange a way to meet this security requirement. Failure to provide all of the required identification at the time of the examination without notifying PSI is considered a missed appointment, and you will not be able to take the examination that day.</p>
Open Book Exam	No
Calculator Allowed	No
Reference Materials Given at Site	None
Passing Score	<p>All examinations require a 60 percent score to pass, except for the Adjuster and Bail examinations.</p> <p>Adjuster and Bail examinations require a passing score of 70 percent.</p>
Cut score	N/A
Veteran's Preference Points	N/A
Score reports	<p>Your score will be displayed on screen at the end of the examination and a score report will be emailed to you. If you fail, the emailed score report will include the diagnostic report indicating your strengths and weaknesses by examination type.</p> <p>Test takers taking a remotely proctored exam: Please note that you must select to end both the exam portion and survey portion of your test in order to receive your on-screen results and emailed score report. If you do not receive your emailed score report, you may reach out to scorereport@psionline.com.</p>
Dup Score Report Fee	Free by mail (5 to 7 business days), \$40 expedited fee (2 - 3 business days)
Fingerprint Info	CA Insurance Fingerprint Information
Licensing instructions	<p>California Department of Insurance is authorized to license individuals who wish to operate as insurance producers, adjusters, and bail agents as defined in CIC.</p> <p>The steps to become licensed are:</p> <ol style="list-style-type: none"> 1. Complete any prelicensing education requirements. 2. Pass a licensing examination to confirm that you have attained at least a minimum level of knowledge regarding the principles, practices, statutes, and regulations relating to the insurance profession and the services you will sell or represent to consumers. 3. Submit a completed license application to California Department of Insurance.
Retest fee	Refer to Fees in Atlas
Retest procedure	<p>In order to retest, you must re-register.</p> <p>Effective January 1, 2017, any insurance license exam Test taker that has failed an exam ten times within the previous 12-month period will be barred from taking the same exam for a period of 12 months from the date of the last failed exam. Exams that were taken and failed during Calendar Year 2016 will be counted towards the ten exam limit.</p> <p>The calculation for determining the number of exams taken is based on exam type. For instance, an exam Test taker who is in the process of taking both the life-only exam and the personal lines exam would not have their exams combined (e.g., the count for this exam Test taker would be five times for the life-only exam and four times for the personal lines exam in the same 12-month period. In this example, the exam Test taker would not be counted as taking nine exams towards the ten exam limit).</p> <p>However, combination exams which include one of the license types of a single exam taken in the same 12-month period are considered to be the same exam type when determining the number of exams taken. For instance, an exam Test taker taking the life-only exam eight times and a combination life and accident/health exam two times in the same 12-month period will have reached the ten exam limit for taking any of California Department of Insurance's life agent exams, including life limited to funeral and burial expenses.</p>
Exam review	Not an option
Practice Exams Offered	Yes - online at https://test-takers.psiexams.com/cadi . You may take the practice exams an unlimited number of times: you will need to pay each time.
Support modes	N/A
Support email	examschedule@psionline.com
Email Response Time	Up to 48 hrs
Scheduling modes	Phone, PSI website
Information Links	CA Insurance Fingerprint Information CDI Insurance Site Accurate Biometrics Fingerprint Form
California Insurance Site Change Procedures:	
Look up Test taker's record in ATLAS and find the confirmation number:	

List of Candidates

ID	Candidate	Client	Test Applied	Registered	Confirmation#
55555555	ARI GOLD	CALIFORNIA DEPARTMENT OF INSURANCE	CA PSI Site - Accident and Health Agent Examination	01/30/2012	a4580170

Take the Number (not including the letter) and then open the Language change utility by opening internet explorer and going to this address - <http://lvcsrtools:8080/estechUtil/>
 Click the link that says "Switch Test Language"
 Enter the number part of the confirmation# into the registration ID field as shown below

completed. {return_code=0}
 Switch Test Language
 Registration ID
 Target Test ID
 User ID 5

Pick the "target test" meaning the exam and site type of the test you want to change the registration to and click on submit
 If the change is successful you will get a "completed.{return_code=0}" if it is unsuccessful you will get a completed.{return_code=1} (0 means it worked, 1 means it failed probably because you tried to change the exam type as well as site and that is not allowed)

GOOD

completed. {return_code=0}
 Switch Test Language
 Registration ID
 Target Test ID
 User ID 5

BAD

completed. {return_code=1}
 Switch Test Language
 Registration ID
 Target Test ID
 User ID 5

Make sure you check ATLAS and that it properly reflects the requested site type. Remember to manually charge the \$33 convenience fee when changing from a Test taker site to a PSI site.

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