



# COVERED CALIFORNIA FOR SMALL BUSINESS

## *MyCCSB Enrollment Online Portal Certified Agent & General Agent User Guide*



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## CERTIFIED AGENT & GENERAL AGENT ACCOUNT CREATION:

Certified Agents and General Agents will receive an email providing an invitation to create their online account through our new web portal (shown below).

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Thank you for creating an account with Covered California for Small Business (CCSB).

Now, you can conduct all of your client's business online. No more completing stacks of paperwork!

Please click the following link to finish setting up **your account**.



Click here on your e-mail to register.

Click on “your account” to create a unique username and password. After successfully creating your account, you will receive the following confirmation notice that your account has been created.



### General Agent Account Created.

Your account has been successfully created. Please sign into the Covered California website using the link below.

Log In

Click the login button and use your newly created credentials to log in to your account.

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## CERTIFIED AGENT & GENERAL AGENT DASHBOARD:

**Certified Agent Dashboard View** - Once logged into MyCCSB, you will be directed to your Certified Agent Dashboard which will automatically display (if applicable) any employer groups that are currently delinquent on their premium payments. You will be provided important information for delinquent groups such as: Employer Group Name, Delinquency Notice Date, Delinquency Notice Due Date, Delinquency Notice Type, Current Amount Due, and Paid Through Date.

**Please Note:** Customer Code is the same as Group ID Number. Within the system, the term Group, Customer, and Company are interchangeable terms.

The options available under a Certified Agent login are:

**Dashboard:** Default home page after login, displays any current delinquent groups under a Certified Agents book of business.

**Quote:** Generate New Quote or View Quotes. All generated quotes will be saved.



**Enroll:** Within the enroll section you can search, locate, and/or continue processing group requests. The option of **Create a Company** allows you to begin a new group application.

**Documents:** Under the documents tab, there are two options to choose from:

Review – The review option will allow you to view any documents uploaded for any of your assigned groups.

Reports - The reports option has 3 reports currently available: New Business Report, Agent Renewal Report and Agent Delinquent Customers.

**Agent Delinquent Customers Report:** This report showcases the delinquent customers listed on the Certified agent’s dashboard. Within this report are the details necessary to avoid group termination.

**Delinquency Notice Date:** Date delinquency notice was sent.

**Delinquency Notice Due Date:** Date payment is due to avoid termination.

**Delinquency Notice Type: Intent to Term** means the group will be terminated effective on the first of the month following a 30-day grace period from their last paid through date.

**Delinquency Notice Due:** Is the Amount due to avoid termination, however the current amount due, is the amount necessary to continue coverage and to avoid another delinquency notice.

CERTIFIED AGENT DASHBOARD IMAGE:

The screenshot shows the 'Agent Delinquent Customers' report on the Covered California Small Business dashboard. The report includes a table with the following columns: Customer Code, Customer Name, Contact Name, Contact Phone, Current Amount Due, Delinquency Notice Date, Delinquency Notice Due Date, Delinquency Notice Type, Delinquency Notice Due, Delinquency Notice Paid, Delinquency Notice Remaining Due, and Paid Through Date. There are five rows of data listed.

Customer Code	Customer Name	Contact Name	Contact Phone	Current Amount Due	Delinquency Notice Date	Delinquency Notice Due Date	Delinquency Notice Type	Delinquency Notice Due	Delinquency Notice Paid	Delinquency Notice Remaining Due	Paid Through Date
500004	Barry's Boating Supply_KR	Barry Hampton	0000000000	13430.81	06/01/2021	02/28/2021	Intent to Term	67154.05	0	13430.81	01/31/2021
500401	UAT Group 8 (Shannon-COBRA)	Rob Miller	4444444444	89110.43	06/01/2021	06/30/2021	Intent to Term	44567.13	0	44567.13	05/31/2021
500355	Regression Test 7_04.09.21	Regression 7	2342342343	14376.88	06/01/2021	06/30/2021	Intent to Term	7188.44	0	7188.44	05/31/2021
500357	Regression Test 2 4/9/21	j r	5484964616	6564.5	06/01/2021	06/30/2021	Intent to Term	3006.7	0	3006.7	05/31/2021
500146	Harvey Mudd's 55 Brightest	David Wolf	4564654654	96688.68	06/01/2021	06/30/2021	Intent to Term	48344.34	0	48344.34	05/31/2021

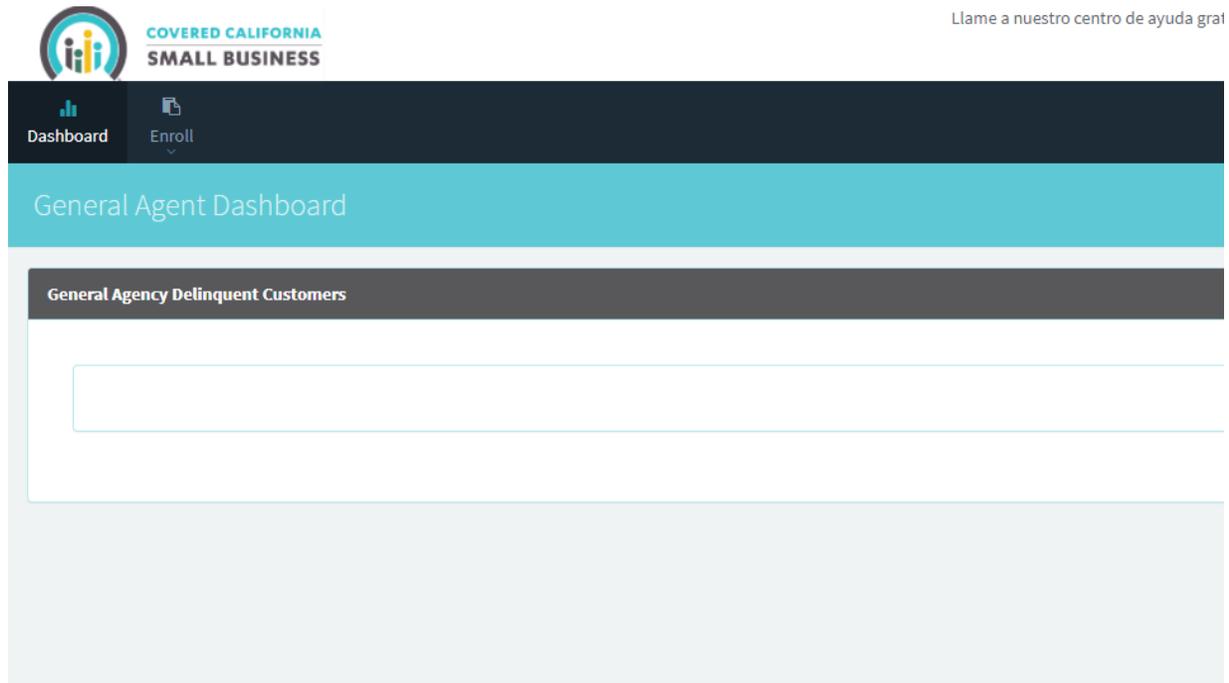


**General Agent Dashboard View** – Once logged into MyCCSB, you will be directed to your General Agent Dashboard, which will display (if applicable) any delinquent groups that are delinquent on their premium payment. The options available under the Covered California for Small Business logo for General Agents are as follows:

**Dashboard:** Default home page after login, displays any current delinquent groups under a Certified Agents book of business.

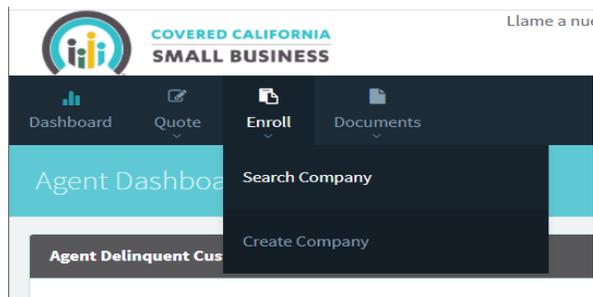
**Enroll:** Within the enroll section you can search, locate, and/or continue processing group requests. The option of **Create a Company** will allow you to begin a new group application.

**Please Note:** Customer Code is the same as Group ID Number. Within the system, the term Group, Customer, and Company are interchangeable terms.



## VIEWING FULL BOOK OF BUSINESS FOR CERTIFIED AGENTS AND GENERAL AGENTS:

To view your full book of business, scroll over the Enroll Option and click Search Company.





In the Company Name Window (Enter a blank space and select Search to see all results). This will list your full book of business in descending order from newest customer account number (Group ID Number) to oldest customer account number.

There are five statuses for a Company's application:

**In Progress** – The Company application has been started, and you have made it past the employee roster page, however the application has not been submitted.

**Submitted** – The Company application has been submitted, Employees may be in the initial open enrollment process

**Completed** – The Company and Employee applications has been approved, and the company has been sent the Initial invoice (24 hours after completed status), and any concurrent invoices.

**Expired** – An in-Progress Company application which was never completed will become expired prior to the company's effectuation date

**Blank/No Status** – The company information page has been submitted; no additional information has been submitted. These applications will not expire but will only have a future effectuation date.

Customer Account Number	Company Name	Effective Date	Creation Date	Last Updated Date	Current Status	Prior Status	Action	Summary
500472 500472	The Agent Team, LLC.						<a href="#">View Details</a>	<a href="#">Download</a>
500461 500461	Number46	07-01-2021	06-07-2021	06-08-2021	Submitted	InProgress	<a href="#">View Details</a>	<a href="#">Download</a>
500401 500401	UAT Group 8 (Shannon COBRA)	04-01-2021	05-07-2021	05-08-2021	Completed	Submitted	<a href="#">View Details</a>	<a href="#">Download</a>
500388 500388	UAT Group 1 (INDA-Cal COBRA)	03-01-2021	05-06-2021	05-07-2021	Completed	Submitted	<a href="#">View Details</a>	<a href="#">Download</a>
500382 500382	Shark Food	06-01-2021	04-29-2021	06-01-2021	Expired	InProgress	<a href="#">View Details</a>	<a href="#">Download</a>
500375 500375	Joe Car Company	06-01-2021	04-27-2021	05-25-2021	Submitted	InProgress	<a href="#">View Details</a>	<a href="#">Download</a>
500372 500372	Testing 123	06-01-2021	04-26-2021	06-01-2021	Cancelled	Completed	<a href="#">View Details</a>	<a href="#">Download</a>
500357 500357	Regression Test 2_4/9/21	07-01-2021	05-01-2021	06-21-2021	Completed	Submitted	<a href="#">View Details</a>	<a href="#">Download</a>
500355 500355	Regression Test 7_04/09/21	05-01-2021	04-09-2021	04-12-2021	Completed	Submitted	<a href="#">View Details</a>	<a href="#">Download</a>
500354 500354	Regression test 6_04/09/21	05-01-2021	04-09-2021	05-01-2021	Expired	InProgress	<a href="#">View Details</a>	<a href="#">Download</a>

This page will also provide a brief overview of the company's application process, it provides the Customer Account Number, Company Name, along with the company Effective Date, Creation Date, Last Updated Date, Current Status and the Prior Status.

To select the employer group – select View Details

500433 500433	Pumpkin Patches, Inc.	08-01-2021	05-20-2021	05-21-2021	Submitted	InProgress	<a href="#">View Details</a>	<a href="#">Download</a>
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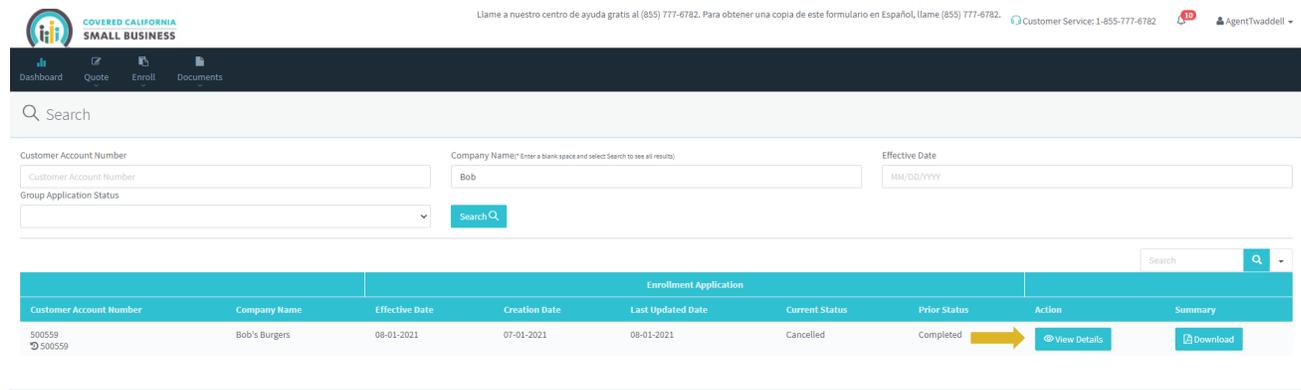


## EMPLOYER DASHBOARD:

Employer Dashboard – As a Certified agent and general agent, you are able to proxy into the Employer’s dashboard and see most of the options available to your employer groups. Employer groups do have an additional billing dashboard, which is unavailable to Certified agents, and general agents.

Scroll over Enroll and click Search Company. Enter any of the three search criteria: Customer Account Number, Company Name or Effective Date.

Once result is listed, click View Details.



You will then be sent to the Company Customer Details Page, which will provide a summary of the company’s information. On the bottom of the page there are three options:

**Go to Employer Billing Dashboard** – The Employer Billing Dashboard provides a brief overview of the companies account summary.

**Go to Employer Dashboard** – The Employer Dashboard is where the employer application is saved, employer selections, employee roster, Employer billing, and the documents submitted with the group’s application. This is also the exact same look that the employer will have if they access the account.

**Invite Employer to Manage Account** – Select this to send an e-mail to the employer contact and allow them to help self-manage their account.

To go to the Employer Dashboard click Go to Employer Dashboard (bottom right of screen).



You will now be directed to the Employer Dashboard. The Employer Dashboard provides access to any employer documents or processes, such as submitting an employer application, payment history, invoices, employee roster, submitting employee applications, and viewing and updating employer or employee demographics.



The screenshot shows a user dashboard for 'Brian's Wine'. The top navigation bar includes: Dashboard, Employees, Applications, Payments, Agent, Documents, and Company Profile. The main content area is divided into two sections:

- Plan Benefits:** Lists two medical reference plans from 'blue california'. The first is 'Platinum 90 PPO 0/15 + Child Dental INF' with 2 subscribers and 0 dependents. The second is 'Silver 70 PPO 2250/50 + Child Dental INF' with 1 subscriber and 1 dependent. Both plans include a 'View Summary of Benefits' link.
- Payment Overview:** A table comparing 'From Last Statement' and 'Current' values.
 

Category	Total Due	Past Due	Previous Balance / Delinquency Status
From Last Statement	\$23,595.59	\$2,156.41	\$2,156.41
Current (Reflects changes since last statement)	\$23,595.59	\$2,156.41	--

### Creating a New Business Employer Application

From the General Agent or Certified Agent Dashboard, select Enroll, and then **Create Company**.

The screenshot shows the 'Enroll' dropdown menu in the 'Agent Dashboard'. The menu options are: Search Company and Create Company.

From here you will be automatically transferred into the Employer Application screens. Please input all applicable fields for the Employer.

The 'Company Information' form contains the following fields:

- Doing Business As\* (Text input: ACME LLC)
- Federal Employer Identification Number (FEIN)\* (Text input: 123456789)
- Email\* (Text input: email@domain.com)
- Business Legal Name (Text input)
- Organization Type (Dropdown menu)
- Class of Business\* (Dropdown menu)
- First Name\* (Text input: First Name)
- Middle Name (Text input: Middle Name)
- Last Name\* (Text input: Last Name)
- Suffix (Dropdown menu)
- Phone Number\* (Text input with formatting: ( ) - - )
- Phone Type\* (Dropdown menu)
- Preferred Language (written/spoken - if not English) (Text input)
- How Long Have You Been in Business?\* (Dropdown menu)
- Do you want to go paperless?\* (Dropdown menu: No)

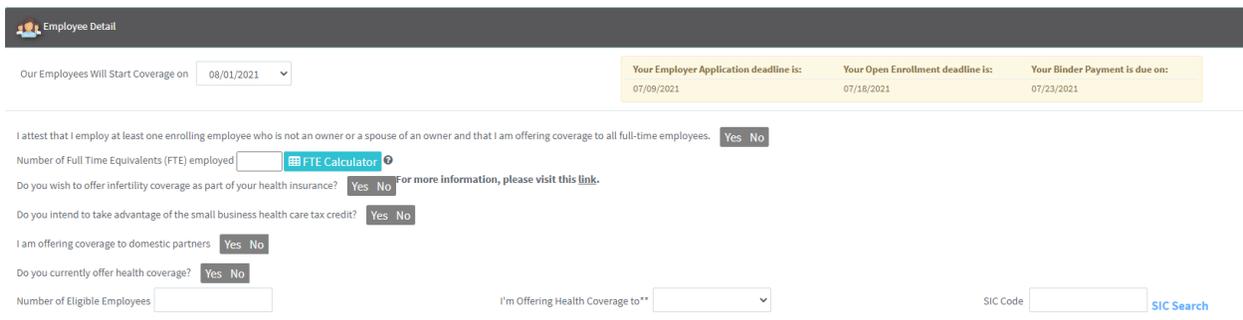


As the Certified agent of record, please have the Agent of Record Form, which is located towards the bottom of the page, filled out and signed by the employer.

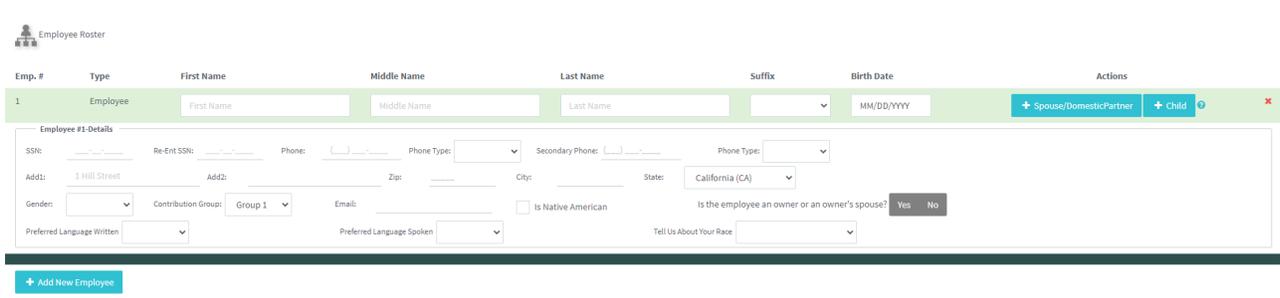
**Please note:** When signed in as a Certified Agent, you will automatically be assigned to any New Business Application, along with the General Agency, if applicable, that you work with.



After all Employer demographics have been entered, you can select **Next** to move to the Employee Roster input page. This page also covers the application questions regarding Coverage Start Date, Infertility Selections, number of Full Time Employees, and if the Employer is covering Employee only or Employee+Family, etc.



The next step is completion of the Employee Roster. For each Full Time Employee, please input their demographics under the Employee Roster screen. To delete an employee, you can use the red X in the green banner. To add a spouse or child, please use the blue +Spouse/Domestic Partner or +Child button. To add an additional employee, select the +Add New Employee Button on the bottom left side of the Employee page.



Once the employee roster is filled out in its entirety, then the Employers Metal Tier selection must be completed. Employers have the option to choose up to four contiguous metal tiers.



### Select Metal Level Options



**Why Choose This?**  
As an Employer, you can control costs by specifying the available metal levels of the plans that employees can choose from.

- Platinum
- Gold
- Silver
- Bronze

Metal Levels must be contiguous in order to proceed.

**How it works:**

- Select one or more neighboring metal levels.
- Select your financial contribution.

Once metal tiers are selected, the Medical Reference plan selection screen is next. To select the plan, press the “Select Plan.” button

### Benefit Plan Selection - Medical

**Company**

Amigos Inc

Employees: 1

Dependents: 1

Total: 1

Average Age: 25

[Change Roster](#)

**Shopping Filters**

Price Range

Displaying: 2 Medical Plan(s) Sorted by: Price (Low)

Compare Selected Plans

Bronze 60 HDHP HMO 7000/0%	Oscar Circle Bronze 60 HDHP EPD 7000/0% + Child De...
 <b>KAISER PERMANENTE</b>	 <b>OSCAR</b>
<p><b>Deductible</b></p> <p>\$7,000 / \$14000</p>	<p><b>Deductible</b></p> <p>\$7,000 / \$14000</p>
<p><b>Out-Of-Pocket Max</b></p> <p>\$7,000 / \$14000</p>	<p><b>Out-Of-Pocket Max</b></p> <p>\$7,000 / \$14000</p>
<p><b>Premium / Month</b></p> <p><b>\$229.42</b></p>	<p><b>Premium / Month</b></p> <p><b>\$237.08</b></p>
<p><b>Other Plan Details</b></p> <p>Coinsurance: 0.00%</p>	<p><b>Other Plan Details</b></p> <p>Coinsurance: 0.00%</p>
<p><a href="#">View Details/Print</a></p>	<p><a href="#">View Details/Print</a></p>
<p>Select Plan &gt;</p>	<p>Select Plan &gt;</p>

After the Medical Reference selection, employers have the option to offer their employees dental coverage. If they do not wish to offer dental coverage, there is an attestation at the top of the screen which state “I do not wish to offer dental, I offer this benefit to my employees outside of Covered California.”

**Please note:** If the group is selecting to offer dental coverage, then they will have to select a dental reference plan. However, contribution to the employee’s dental coverage is optional.

### Benefit Plan Selection - Dental

**Company**

Amigos Inc

Employees: 1

Dependents: 1

Total: 1

Average Age: 25

[Change Roster](#)

**Shopping Filters**

Price Range

**Dental coverage is required**

I do not wish to offer dental, I offer this benefit to my employees outside of Covered California

Displaying: 2 Dental Plan(s) Sorted by: Price (Low)

Compare Selected Plans

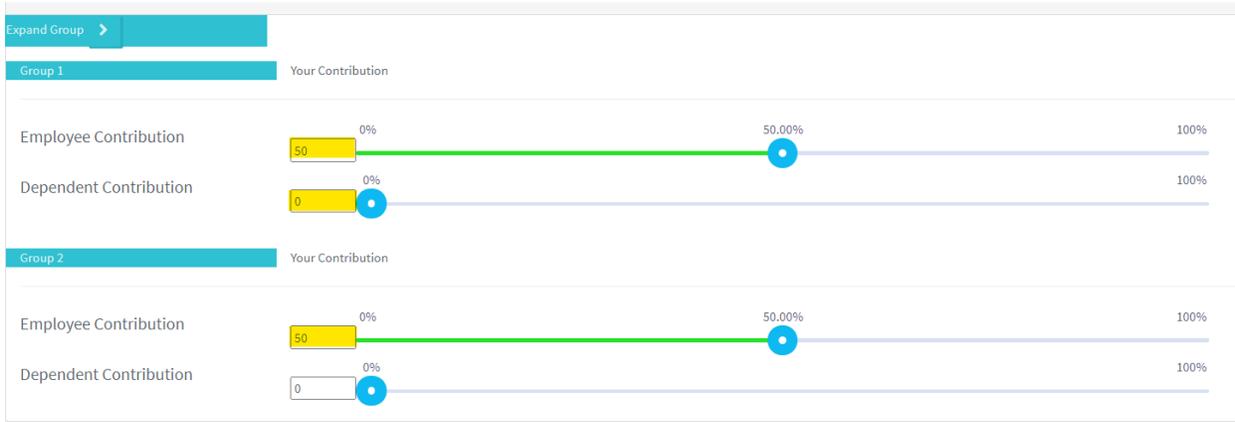
Family Dental HMO	Family Dental HMO
 <b>California Dental Network</b>	 <b>Dental Health Services</b>
<p><b>Deductible</b></p> <p>Annual Benefit Maximum</p>	<p><b>Deductible</b></p> <p>Annual Benefit Maximum</p>
<p><b>Premium / Month</b></p> <p><b>\$7.59</b></p>	<p><b>Premium / Month</b></p> <p><b>\$10.39</b></p>
<p><b>Other Plan Details</b></p> <p>Coinsurance: 0.00%</p>	<p><b>Other Plan Details</b></p> <p>Coinsurance: 0.00%</p>
<p><a href="#">View Details/Print</a></p>	<p><a href="#">View Details/Print</a></p>
<p>Select Plan &gt;</p>	<p>Select Plan &gt;</p>

After reference plans have been selected, then the Contribution amount can be selected. For the contribution amount, the percentage contribution can be set by entering the percentage amount numerically (highlighted box shown below) or by using the percentage sliding scale.



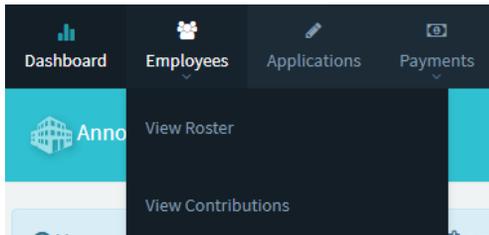
There is an option to create two contribution groups, if the employer wants to create different contribution amounts for their employees. The employer can identify the different Groups (Group 1 or Group 2) to indicate the different contribution amount. The employer will need to ensure that each of their employees are appropriately assigned to the correct Group during the enrollment application process.

**For Example:** The employer has decided that for their employees, they want to contribute 75% of their medical premiums. In addition, the employer would like to contribute 100% towards their management employees.



After selections are complete, the final page is the arbitration page. Once the application is completed, it will be submitted to Covered California for Small Business for review.

You can then proceed to the Employer Dashboard to view the employee roster. Employee enrollments can be managed from this location.

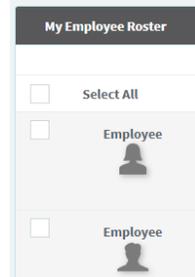


Once in the employee roster, you can:

**Invite Employees** – Select the Invite Employees, to select a box on the left-hand side of the Employee image, and then select Send Invitation Email. By doing so, you will trigger a notice to the employee that they are able to self-serve within the portal. Self-serving within the portal allows the employee to update their demographics and complete the employee application. They will have the option to research plan options, see contribution amounts, and learn about the benefits of each of our carrier plans.

**View Application** – By selecting this option, you can go into the Employee application, and select the plan options that they want to select.

**Update / View Employee Dashboard** – By selecting Update/View Employee Dashboard, you can update the Employee demographics.





**View Details** – By selecting View Details, you will be moved into the employee dashboard. From here you can update the employee demographics in full, including, their name, Social security number, and date of birth.

## HOW TO ADD A NEW EMPLOYEE –

Under Employees – Select View Roster

There is an Add Employee Button at the bottom right hand corner of the screen to start the add process. Select the Add Employee Button and enter in the employee’s demographics. Once demographics are submitted click add employee with New Plan.

**Please Note:** If you are adding a spouse or dependent child, select the light blue buttons on the top right of the employee demographic screen.

First Name	Middle Name	Last Name	Suffix	Birth Date	Actions
John		Doe		10/01/1990	+ Spouse/DomesticPartner + Child

**Employee #3-Details**

SSN: 111-11-1112 Re-Ent SSN: 111-11-1112 Phone: ( ) - - Phone Type: Home Secondary Phone: ( ) - -  
 Add1: 1601 Exposition Blvd Add2: State: California (CA) Zip: 95815 City: Sacramento  
 Secondary Add1: 1 Hill Street Add2: State: California (CA) Zip: City:  
 Gender: Male Group: Group 1 Email: john.doe@yopmail.com  Enrolling in Medical Insurance  
 Enrolling in Dental Insurance  Is Native American

Once the employee is added, you will be taken to the Update Enrollment screen, which will ask for the Qualifying Life Event. Enter the date of the qualifying life event, which will provide you will a coverage start date.

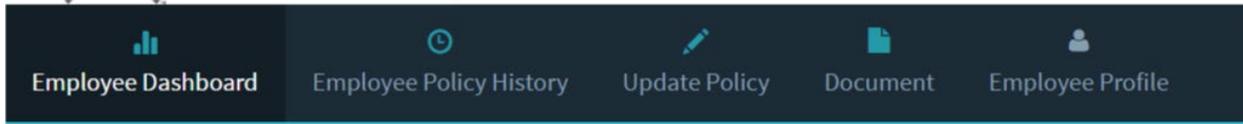
**Please note:** If the coverage start date that the employer is requesting is not available, please submit the completed Employee application to [CCSBeligibility@covered.ca.gov](mailto:CCSBeligibility@covered.ca.gov). The CCSB team will review the application and reach out to the point of contact if there are any inconsistencies.

From this screen you can select “Create New Enrollment”. From here, select the Open Dashboard button to Complete Enrollment which will take you to the employee dashboard to process the application and for the employee plan selections. You can also invite the employee to access their account and self-serve.



## TO ADD A SPOUSE OR DEPENDENT

From the employer dashboard, locate the Employee roster and find the applicable member. Select Update/View Employee Dashboard and then select Update Policy in the Dark Blue Banner.



Once selected you will have two options to choose from:

Select **Changing or Adding Coverage** – Select this if the member is adding a spouse or dependent, or is qualified for a policy change due to a Qualifying Life Event. Select **Next**.

What update are you making?

Ending coverage for one or more members  
 Changing or adding coverage

✕ Cancel
Next >

**Please note:** The ability to add a dependent or spouse is 30 days from the Qualifying Life Event (QLE) Date for most QLEs. Within the Portal, as an agent, you are only able to add within the past 30 days from today's date. To correctly add a dependent or spouse, the QLE date should be within the past 30 day period. If the Qualifying Life Event date is greater than 30 days from today's date, please submit the completed employee application to [CCSBEligibility@covered.ca.gov](mailto:CCSBEligibility@covered.ca.gov)

Follow the prompts to input all the necessary information. Once completed select **Confirm** for this change to become active within the system.

### Dependents Being Added

Dependent	First	Last	DOB	Gender	Medical	Dental
child	Johnnie	Walker	06/16/2021	Male	✓	✓

### New Estimated Costs Starting 07/01/2021

Plan Name: **Platinum 90**  
EPO 0/15 + Child Dental  
INF



Employee Monthly Cost: \$359.07  
Employer Monthly Cost: \$578.24  
Total Monthly Cost: \$937.31

Plan Name: **Family Dental**  
PPO



Employee Monthly Cost: \$83.98  
Employer Monthly Cost: \$0.00  
Total Monthly Cost: \$83.98

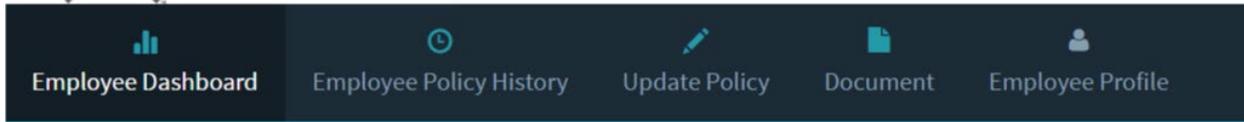
### Estimated Grand Totals

Employee Monthly Cost: **\$443.05**  
Employer Monthly Cost: **\$578.24**  
Total Monthly Cost: **\$1,021.29**



## TO TERMINATE AN EMPLOYEE, SPOUSE, AND/OR DEPENDENT (OR ALL OF THE ABOVE)

From the employer dashboard, locate the employee roster under the Employee section. Identify the employee who wants to terminate a spouse and/or dependent and select Update/View Employee Dashboard.



To process a termination of an employee, spouse, and/or dependent, select **Ending Coverage for one or more members** and then select **Next**. From here you will have a drop down to select the termination reason or the qualifying life event and then then you will select the effective date of the termination.

What is the reason for the termination ? Termination of Coverage ▾

« Redo
◀ Back
Next ▶

What is the date of the event?  
Termination of Coverage

07/14/2021 📅

July 2021						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	01	02	03
04	05	06	07	08	09	10
11	12	13	14	15	16	17

Next ▶

Once the termination date of event is selected, the health plan will be terminated first of the following month from the event date.

When will the coverage termination **take effect** ?  
Termination of Coverage on 07/14/2021

For an event of *Termination of Coverage* on 07/14/2021, the last day of coverage would occur on:

**07/31/2021**

Any coverage under an altered policy would begin on:

**08/01/2021**

« Redo
◀ Back
Okay, Next ▶

Next, you select the individuals who will no longer be eligible for coverage. If you terminate the subscriber, then all dependents will also be removed from coverage.



## NOTIFICATIONS

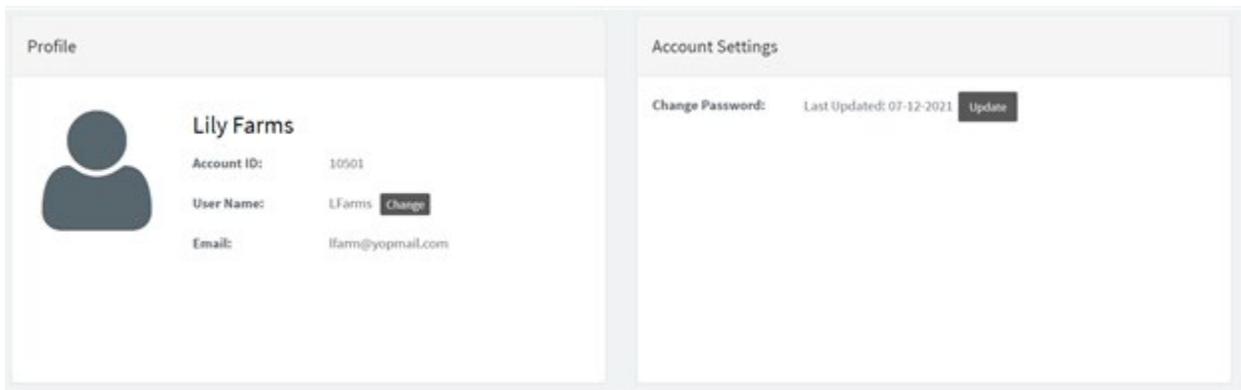
When you log into the system, there will be a small bell on the top right-hand corner of the screen, which may have a red circle with a numeric within. This is the notifications section, which will showcase any updates which may have occurred to any accounts under your purview. For every notification that you receive you will also receive an e-mail detailing what occurred.

## ACCOUNT SETTINGS

To update profile User Name or password, select the username then Account Settings.



When you select Account Settings, you will be taken into the Profile and account settings page. From here you can update your Username or Password. Click the change or update button, and from here you will be prompted to update your username or password.



**Please note:** Usernames must be unique; you are not allowed the same username as another user on the system.