



BBP Admin
BENEFITS ADMINISTRATION

COBRA, FMLA, FSA, HRA, HSA, TRANSIT

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COBRA/FSA/HRA/HSA Additional Information Form

COBRA

Thank you for the new COBRA Group! Below is additional information we need for a smooth implementation. Once we get all this information we will start as the administrator on the group:

- What is the go live date for COBRA?
- Will you or the client be billed?
- Will we be managing COBRA adds and terms?
- Who needs a log-in to the COBRA system? (Please include full names and email addresses)
- How many COBRA-eligible employees are we billing for?
- Are there any current COBRA participants or notified PQBs still in the enrollment period? If so, we need this form completed for each participant so that we can take over administering COBRA: [COBRA Participants Form](#)

IMPORTANT: In order to reinstate and term COBRA participants, we need the carrier contact information completed below:

Carrier #1	
Type of Coverage	

Carrier Name	
Group #	
Contact Name	
Phone	
Email Address	
Carrier #2	
Type of Coverage	
Carrier Name	
Group #	
Contact Name	
Phone	
Email Address	
Carrier #3	
Type of Coverage	
Carrier Name	
Group #	
Contact Name	
Phone	
Email Address	
Carrier #4	
Type of Coverage	
Carrier Name	
Group #	
Contact Name	

Phone	
Email Address	

Also, please be sure and have your client view our COBRA Terms of Service: [COBRA TOS](#)

Lastly, have your client consider setting up direct deposit with us — direct deposit allows us to disburse COBRA payments more quickly and securely: [Direct Deposit Form](#)

Thanks again for giving us your business!

If you have any questions please just let me know.

Thank you,

FSA

Thank you for the new FSA Group! Below is additional information we need for a smooth implementation. Your group was already uploaded into our system and mapped with EN. One thing we see is a HSA coming over on the feed. Can you shut off that plan from coming through on your end. Just go to where you set-up the feed and there are options to exclude plans.

Once we get all this information we below we will finish the administration on the group:

- What is the go live date for the FSA?
- Account Funding
 - a. Please have the group complete the account funding form so we can pay out claims: [http://www.bbpadmin.com/docs/Employer/Bank Account Funding Form.pdf](http://www.bbpadmin.com/docs/Employer/Bank_Account_Funding_Form.pdf)
 - b. Please click to review account funding options or please set-up a call to discuss: [http://www.bbpadmin.com/docs/Employer/Bank Account Funding Options.pdf](http://www.bbpadmin.com/docs/Employer/Bank_Account_Funding_Options.pdf)
- Does the group want debit cards for the FSA plan? (Please note transit and parking are always debit card)
 - a. If debit cards – please inform the group we will pre-send debit cards to the employer for all on the previous plan year. (This is to avoid the cards being shredded and then going forward cards are mailed directly to the participant)
 - b. How would the group like us to handle the substantiation of claims if debit card is being used? - Please click this link to complete form - [http://www.bbpadmin.com/docs/Employer/Implement Substantiation Procedure.pdf](http://www.bbpadmin.com/docs/Employer/Implement_Substantiation_Procedure.pdf)
- How does the FSA plan end? \$500 Carry-Over – Grace Period – Plan just ends year end.
- When will the group be handling their open enrollment this year?
- What payroll calendar does the group have? 52 – 26 – 24 – 12

- What is the first pay date in 2019?
- We have the FSA Medical maximum set at \$2,700 please let us know if group has limit as something else.
- How would the group like us to handle the substantiation of claims if debit card is being used? - Please click this link to complete form - http://www.bbpadmin.com/docs/Employer/Implement_Substantiation_Procedure.pdf
- Please have the group complete the discrimination testing form – <http://www.bbpadmin.com/docs/Employer/NDT.xlsx>
- FSA Terms of Service – Please have your client view our terms of service page. http://www.bbpadmin.com/docs/Employer/TOS_FSA.pdf

HSA

- What is the go live date for the HSA?
- **Avidia changed their fee structure so please see link of fees - http://www.bbpadmin.com/docs/Participant/Avidia_Fee_Letter_Final2.pdf - Please note the account is still \$0, BUT participants must login and opt out of the monthly paper statement. To do so they just follow these instructions- http://www.bbpadmin.com/docs/Participant/HSA_EStatement_OptIn.pdf - Failure to do so will mean the participant will be charged \$1.25 per quarter for the quarterly paper statement. If they opt out they will still get the e-mail statement for free.**
- HSA Account Funding:
 - a. ER can fund the HSA Bank accounts through their payroll company. Best Practice.
 - b. ER can send Avidia a check or use their bank to send ACH file to Avidia
 - c. If ER uses our system to transfer HSA funds there will be a \$2 per EE per month charge for the cost of the ACH transfers. Also, additional forms will have to be completed.
- Does the group also has a FSA and do they need a FSA Limited Purpose?
- When will the open enrollment be complete so we can upload the census?
- HSA Material can be found under our form page on the website under participant [HSA Program](#)
- HSA Terms of Service – Please have your client view our terms of service page. http://www.bbpadmin.com/docs/Employer/TOS_HSA.pdf

HRA

- What is the go live date for the HRA?
- Who is the medical carrier?
- Account Funding
 - a. Please have the group complete the account funding form so we can pay out claims: http://www.bbpadmin.com/docs/Employer/Bank_Account_Funding_Form.pdf
 - b. Please click to review account funding options or please set-up a call to discuss: http://www.bbpadmin.com/docs/Employer/Bank_Account_Funding_Options.pdf
- How many HRA plans does the group have?
- Does the group want debit cards for the HRA plan?
- What is the medical plan benefit year and when does the medical plan reset deductible and out of pocket?

- What does the HRA reimburse?
- What is the HRA reimbursement formula:
 - a. By Tier – EO – ES – EC – Family
 - b. By out of pocket or deductible
- When will the group be handling their open enrollment this year?
- What payroll calendar does the group have? 52 – 26 – 24 – 12
- What is the first pay date in 2019?
- Who is going to handle the run out of the old HRA plan?
- HRA Terms of Service – Please have your client view our terms of service page.
http://www.bbpadmin.com/docs/Employer/TOS_HRA.pdf

Full Implementation Workbooks

COBRA - http://www.bbpadmin.com/docs/Employer/Implement_Employer_Setup_COBRA.xlsx

FSA - http://www.bbpadmin.com/docs/Employer/Implement_FSA_Census.xlsx

HRA - http://www.bbpadmin.com/docs/Employer/Implement_HRA_Census.xlsx

HSA - http://www.bbpadmin.com/docs/Employer/Implement_HSA_Census.xlsx