

Travisoft T-COBRA User Manual

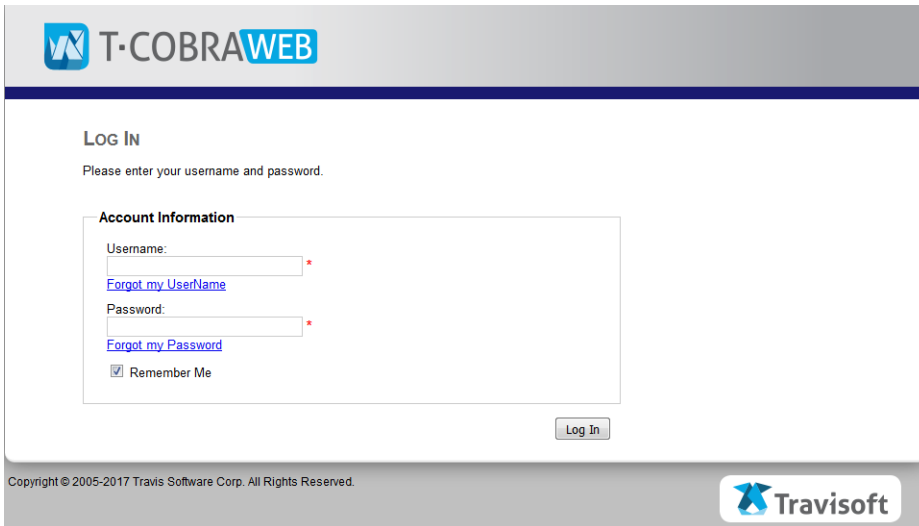
Adding a new Employee

Logging in:

The easiest way to access Travisoft T-COBRA is by going online to <https://bbp.webcobra.com>

Once you are on this site use the Username and Password sent to your email on file.

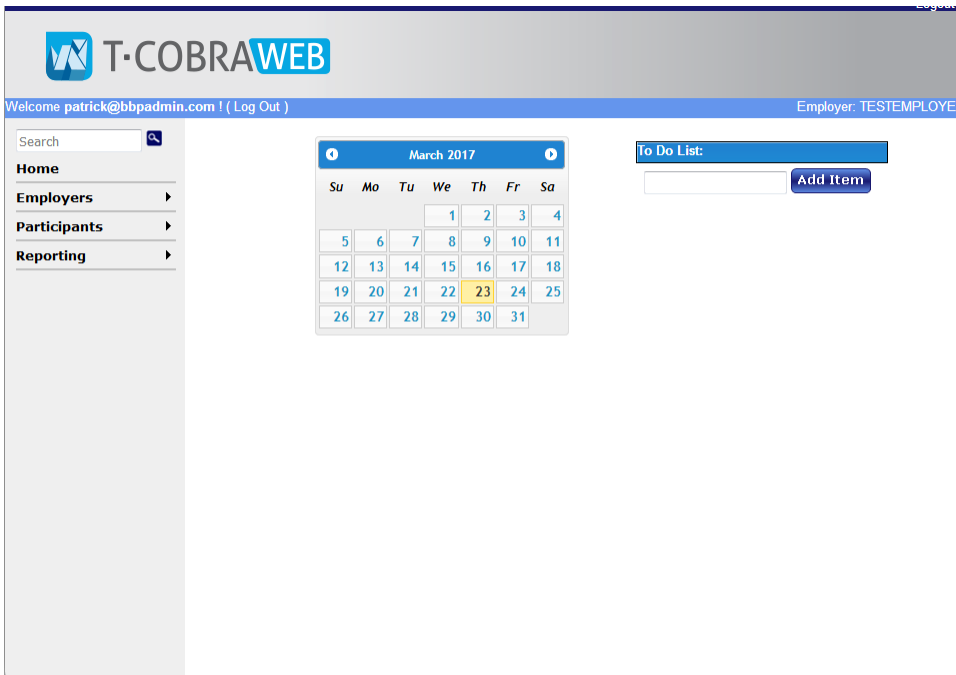
(Issues logging in or have not received an email? Contact BBP Admin at COBRA@bbpadmin.com we are happy to assist!)



The screenshot shows the login interface for T-COBRAWEB. At the top left is the logo and the text "T-COBRAWEB". Below this is a "LOG IN" section with the instruction "Please enter your username and password." A form titled "Account Information" contains fields for "Username:" and "Password:", each with a red asterisk indicating a required field. There are links for "Forgot my UserName" and "Forgot my Password" below their respective fields. A "Remember Me" checkbox is checked. A "Log In" button is located at the bottom right of the form. At the bottom of the page, there is a copyright notice "Copyright © 2005-2017 Travis Software Corp. All Rights Reserved." and the Travisoft logo.

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Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

On the left hand side you will find all of your options. Under the Participants tab you will be able to do things like add a PQB, add a new employee or a retiree.



Entering a new Employee:

Once you select the Add New tab under Employee. Be sure to fill out all the highlighted boxes.

Welcome patrick@bbpadmin.com ! (Log Out) Employer: TESTEMPLOYER

Search

Home

Employers

Participants

Reporting

Active Employee - Add New

1. Active Employee | 2. Dependents

Add New Active Employee

Add Active Employee to Employer:* TESTEMPLOYER

Department: Select...

Transfer COBRA Participant to Active Employee

Active Employee Information

First, M Last:* [Red Box] [Red Box]

Date of Birth:* [Red Box]

Active Employee ID: f01d4c29a836459

Social Security Number: [Red Box]

Employee ID: [Red Box]

Gender: Not Specified

Title: None

Suffix: [Red Box]

Annual Salary (Required for Life Insurance, AD&D and Disability) : [Red Box]

Original Hire Date: [Red Box]

PIN: [Red Box]

Contact Information

Address Line 1:* [Red Box] Phone Number: [Red Box]

Address Line 2: [Red Box] Email available Letters: Yes No

City:* [Red Box] Email Address: [Red Box]

State/Province:* [Red Box] (Required if Correspondence is going to be sent electronically to this Employee)

Zip/Postal Code:* [Red Box]

Country: USA

Contact Information

Address Line 1:* Phone Number: X

Address Line 2: Email available Letters: Yes No

City:* Email Address:

State/Province:* *(Required if Correspondence is going to be sent electronically to this Employee)*

Zip/Postal Code:*

Country: USA

Creditable Benefit Coverage

Core Medical Plan Creditable Coverage:

Months? Days?

OR

Coverage Start Date?

Pre-Existing Condition Maximum Exclusion:

Months? Days?

Retroactive Information

Date COBRA General Notice was sent: *If you fill a date here NO COBRA General Notice will be generated by the system*

Print "And Dependents": Yes No

Eligible for COBRA General Notice: Yes No

Benefit Eligibility Date

Correspondence Language:

[Continue to Dependents >>](#)

[Done - Save Active Employee](#)

By selecting yes, you do not have to enter the dependent information and can just click save.

[Continue to Dependents >>](#)

[Done - Save Active Employee](#)

Click Done -Save Active Employee

Travisoft T-COBRA User Manual

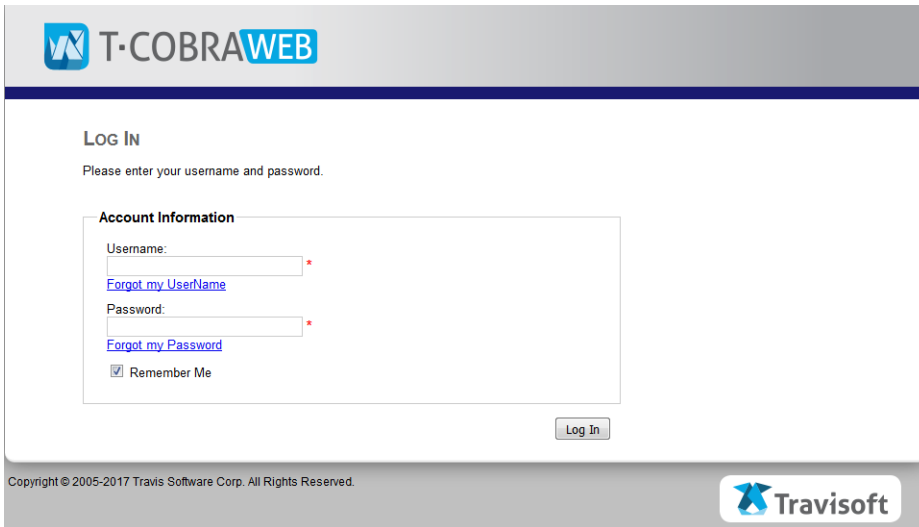
Adding a new PQB

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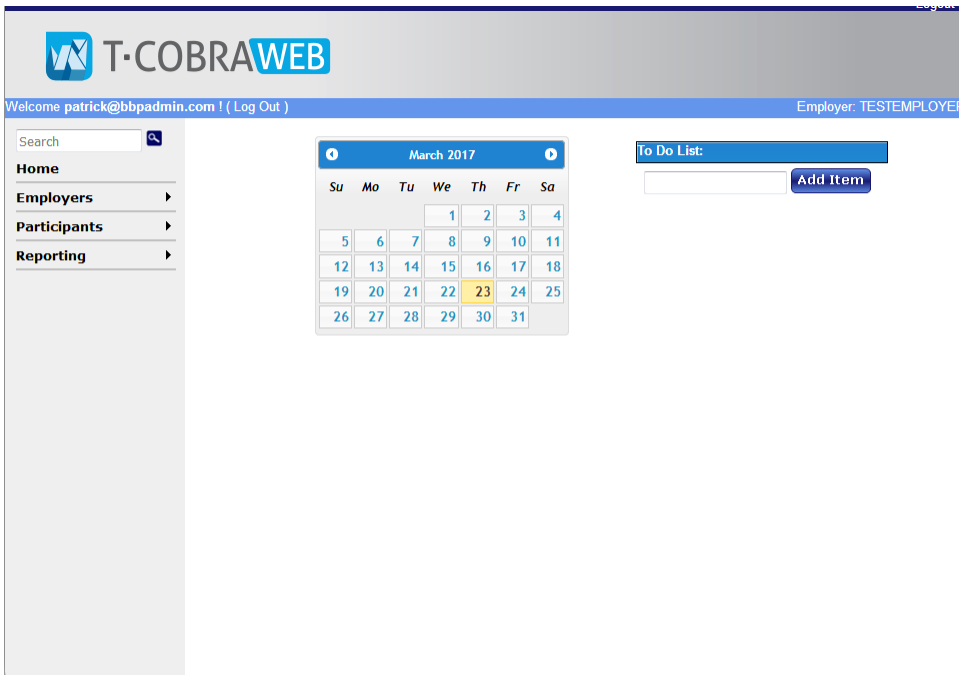
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The screenshot shows the home page of T-COBRAWEB. At the top left is the logo and the text "T-COBRAWEB". Below this is a navigation menu with "Home", "Employers", "Participants", and "Reporting". The main content area features a search bar, a calendar for March 2017, and a "To Do List" section with an "Add Item" button. The calendar shows the date 23 highlighted. The "To Do List" section has a text input field and an "Add Item" button. At the top right, there is a user greeting: "Welcome patrick@bbpadmin.com ! (Log Out)" and "Employer: TESTEMPLOYER".

On the left-hand side, you will find all available options. Under the Participants tab, you will be able to do things like add a PQB, add a new employee or a retiree.



Entering a PQB:

Once you select the add New tab under COBRA Participants. Be sure to fill out all the highlighted boxes.

Contact Information

Address Line 1:* Phone Number: X

Address Line 2:

City:* Email available Letters: Yes No

State/Province:* Email Address: *(Required if Correspondence is going to be sent electronically to this PQB)*

Zip/Postal Code:*

Country:

Takeover / Retroactive Information (Not required for New Qualifying Events)

Additional Actions

Enroll with 100% Subsidy: Yes No

Print a Premium Coupon Set: Yes No

Override Coupon Date Range: Yes No

Medicaid Participant: Yes No

Print "And Dependents": Yes No <-Change to YES if they have dependents!

On Hold Until:

SS Disability

[Continue to Event>>](#)

[Cancel PQB Entry](#)

When finished, click on Continue to Event.

You are going click the highlighted box and choose termination.

T-COBRAWEB

Welcome patrick@bbpadmin.com ! (Log Out) Employer: ITESTEMPLOYER

Search

Home

Employers ▶

Participants ▶

Reporting ▶

PQB and Dependents - Add New

1. PQB | 2. Event | 3. Dependents | 4. Benefits

Qualifying Event

Qualifying Event Type:*

[<< Return to PQB](#) [Continue to Dependents >>](#)

[Cancel PQB Entry](#)

You are going to have to fill out the day the person was terminated. Then you are going to click Continue to Dependents.

T-COBRAWEB

Welcome patrick@bbpadmin.com ! (Log Out) Employer: TESTEMPLOYER

Search

Home
Employers
Participants
Reporting

PQB and Dependents - Add New

1. PQB | 2. Event | 3. Dependents | 4. Benefits

Qualifying Event

Qualifying Event Type:* Termination

Qualifying Event Date:* 04/06/2017

What day was the administrator notified:* 4/6/2017

Event Description: Termination

<< Return to PQB

Continue to Dependents >>

Cancel PQB Entry

Entering Dependents:

If the PQB has dependents you will enter this information here. If they do not, simply click Continue to Benefits. If you are adding Dependents, you will select the relationship (spouse, child). If there are multiple dependents, once you are done filling out info for one, click Save and Add Another Dependent. Once all are added, click Continue to Benefits.

T-COBRAWEB

Welcome patrick@bbpadmin.com ! (Log Out) Employer: TESTEMPLOYER

Search

Home
Employers
Participants
Reporting

PQB and Dependents - Add New

1. PQB | 2. Event | 3. Dependents | 4. Benefits

Dependent Information

Add New Dependent

First, M, Last:*

Date of Birth:*

Relationship: Dependent

Dependent ID:

Social Security Number:

Gender: Not Specified

Email Address:

(Required if Correspondence is going to be sent electronically to this Dependent)

Dependent Eligible for Secondary Event:* Yes No

Receive own copy of Correspondence: Yes No

Use PQB Address: Yes No

Cancel Entry

Save and Add Another Dependent

<< Return To Event

Continue to Benefits >>

Cancel PQB Entry

Here you will add the Benefit plans the PQB is eligible to enroll in. Under coverage level, you will choose PQB Only or another applicable level. If the benefit is a member specific amount, enter the premium without the 2% admin fee there.

Premium Billing Amount:

Coverage Level Description:

Under Individual Assignment Information, it is important that you change the dot to Yes so the people under the plan can elect. Be sure to review the date their coverage will start. This can vary under different employers between the day of termination or the first day of the following month. Once completed, click Done- Save PQB at the bottom and the system will automatically send a coupon booklet and COBRA enrollment letter.

T-COBRAWEB

Welcome patrick@bbpadmin.com ! (Log Out) Employer: TESTEMPLOYER

Search

Home

Employers

Participants

Reporting

PQB and Dependents - Add New

1. PQB 2. Event 3. Dependents 4. Benefits

Benefit Assignment

Benefit Plan Selection

Insurance Carrier:* TESTBCBS

Benefit Plan:* TEXAS - TESTA

Coverage Level:* PQB Only (\$175.00)

Coverage Start/End Information

Continuation Coverage Period: 04/07/2017 - 10/06/2018

First Day After LOC: 04/07/2017

Continuation Coverage End Date: 10/06/2018

Continuation Coverage Eligibility Date:* 4/7/2017

Premium Billing Start Date:* 4/7/2017

Fee Start Date:* 4/7/2017

Waiting Period Before Coverage Began: 0 days

Subsidy Information

Type of Subsidy: Employer

Subsidy Description:

Date Subsidy will Begin: *

Date Subsidy will End: *

Form of Subsidy:* Fixed Amount Percentage

Subsidy: *

Cancel This Subsidy Add Additional Subsidy

Individual Assignment Information

Test Test Assigned to this plan: Yes No

18 Months Prior Coverage:* Yes No Original Coverage Start Date:* 04/07/2017

George Washington Assigned to this plan: Yes No

18 Months Prior Coverage* Yes No **Change to YES** Original Coverage Start Date:* 04/07/2017

Cancel Entry **Save And Add Another Plan**

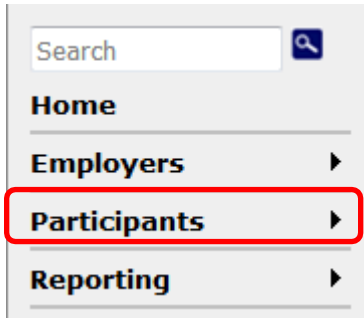
<< Return To Dependents

Cancel PQB Entry **Done - Save PQB**

Travisoft T-COBRA WEB

Viewing documents

Log into Travisoft and in the home page. Move your mouse over the Participants tab. Then select Employee, COBRA Participants or Retiree and click on the view/edit tab. You can also use the search bar, type in their name and it will reroute direct to their page.



Next click on the last name of the employee, PQB or Retiree you wish to view.

The screenshot displays the 'PQB & Dependents - View / Edit' page. On the left, the 'Participants' tab is selected in the navigation menu. The main content area features a search bar, a 'QB Listing' section with a description, and various filters. A table lists the results, with the first row highlighted. The 'Last Name' 'Doe' in the first row is circled in red. Below the table, there are options to 'Apply Status Filters' and 'View / Edit Rehired PQBs'. At the bottom right, there is a 'Delete Checked Records' button.

QB Listing
The list below reflects each QB to which you have access, separated by Employer.

[Add New PQB](#)

Filter PQBs by Employer: [Search](#)

Identify QB by: QB ID SSN

Display Inactive Participants: Yes No

Filter PQBs by Status:

- Select All
- Added, Not Notified
- Notified, Awaiting Response
- Enrolled, Pending Payment
- Enrolled
- Terminated
- Denial of Coverage, Not Terminated
- Terminated, Denial of Coverage
- Enrolled, 100% Subsidy
- Quick Cert - Pending
- Quick Cert - Complete
- Enrolled With Severance
- Pending Termination
- Employee Inactive

[Apply Status Filters](#)
[View / Edit Rehired PQBs](#)

Number of PQBs: 3

Employer	Last Name	First Name	Type	SSN	Status	
TESTEMPLOYER	Doe	John	PQB	XXX-XX-0000	Enrolled	View/Edit
TESTEMPLOYER	Like Me Now	How Do You	PQB	XXX-XX-6789	Enrolled	View/Edit
	mcdonalds	Wendy	Dependent		Enrolled	View/Edit
TESTEMPLOYER	Doe_a71fab2894cc	John_a71fab2894cc	PQB	XXX-XX-5945	Notified, Awaiting Response	View/Edit

Page 1 of 1

Number of PQBs to display 25

[Delete Checked Records](#)

Next you will have to click on the History tab, at the very top for employee or PQB. They are in different places. Below you will find the tabs circled dependent on profile type.

T-COBRAWEB

Welcome patrick@bbpadmin.com ! (Log Out) Employer: TESTEMPLOYER

Search

- Home
- Employers ▶
- Participants ▶
- Reporting ▶

smith, John
Employee

Details Contact History Actions

Employee Detail

Employee Status:	Employee Not Notified	Participant ID:	078bafee786c451
Employee Relationship:	Not Specified	SSN:	
Department Name:		Date of Birth:	01/01/2017
Age:	0	Suffix:	
Employee ID		Title:	None
Gender:	Not Specified	Annual Salary (Required for Life Insurance, AD&D and Disability) :	
Hire Date:		Days of Core Coverage	
Months of Core Coverage:		Days of Pre-Existing Condition Exclusion	
Core Coverage Start Date:			
Months of Pre-Existing Condition Exclusion			

[Edit](#)

Dependent Detail

[Add Dependent](#)

Setting Detail

Receive Emails :	No	Receive Letter Copies:	Yes
Include in Address:	Yes	Print 'And Dependents':	No
Correspondence Language:	English	Eligible for COBRA General Notice:	Yes
Benefit Eligibility Date:			

[Edit](#)

T-COBRAWEB

Welcome patrick@bbpadmin.com ! (Log Out) Employer: TESTEMPLOYER

Search

- Home
- Employers ▶
- Participants ▶
- Reporting ▶

Doe, John
PQB

Details Contact Event Benefits Premiums History Actions


PQB Detail

Current Status:	Enrolled	Qualifying Event Date:	02/28/2017	Paid Through Date:	03/31/2017
SSN:	123-45-0000	First Day after Loss of Coverage:	03/01/2017	Current Balance:	(\$304.98)
PQB ID:	d2dda1d5d6d9412	First Possible Termination Date:	05/04/2017	Typical Monthly Premium:	\$304.98
Department:	N/A	Last Payment Date:	03/14/2017	Last Payment Amount:	\$304.98
Event:	Termination	First Possible Term Reason:	Non-Payment	Coverage End Date:	08/31/2018

PQB Relationship:	Former Employee	PQB ID:	d2dda1d5d6d9412
Department Name:		SSN:	123-45-0000
Event Date:	2/28/2017	Date of Birth:	1/1/1980 (37)
First Day After Loss of Coverage:	3/1/2017	Scheduled Continuation End:	8/31/2018
Employee ID		Suffix:	
Gender:	Male	Title:	Mr.
Hire Date:	1/1/2016	Annual Salary (Required for Life Insurance, AD&D and Disability) :	
Years of Service:		Leave of Absense Return Date:	
PIN			

[Edit](#)

Once you click the history tab, you will see three long tabs. Click on the history tab.


smith, John
Employee

Details
Contact
History
Actions

Participant History

▶ Reports

▶ **History**

▶ File Upload

Your page will refresh with the entire history of all documents created for a participant. Click the view button to be able to view the sent documents. From there you should download the PDF file and you can save it or view it. **Any "Grouped Letter" is the full packet mailed out.**

▶ Reports						
▼ History						
Date	Effective Date	User	Affected Participant(s)	Notation	View	Downloaded Via LPA
3/13/2017	3/13/2017	amy@benefits411.com	Family	PQB Added		
3/13/2017	3/1/2017	amy@benefits411.com	John Doe	Add Benefit Assignment: TESTAAAA \ wfasd \ test - Doe, John \ xxx-xx-000		
3/13/2017	3/13/2017	amy@benefits411.com	John Doe	Continuation end of:08/31/2018 added		
3/13/2017	3/13/2017	SystemUser	John Doe	Enrollment Waiver - Printed	View	No
3/13/2017	3/13/2017	SystemUser	John Doe	Premium Computation Form - Printed	View	No
3/13/2017	3/13/2017	SystemUser	John Doe	COBRA Election Notice - Printed	View	No
3/13/2017	3/13/2017	SystemUser	John Doe	Enrollment Form - Printed	View	No
3/13/2017	3/13/2017	SystemUser	John Doe	PQB Grouped Letter - Printed	View	No

Travisoft T-COBRA WEB

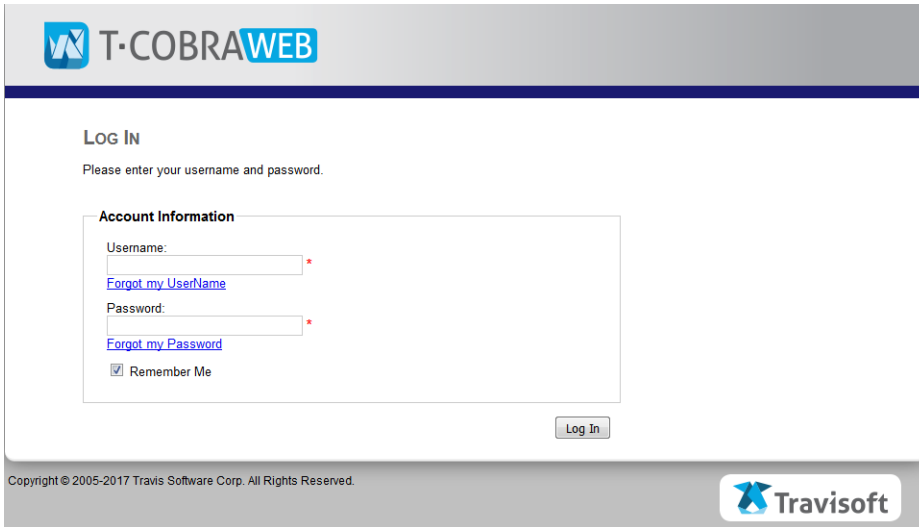
Running PQB Detail Report

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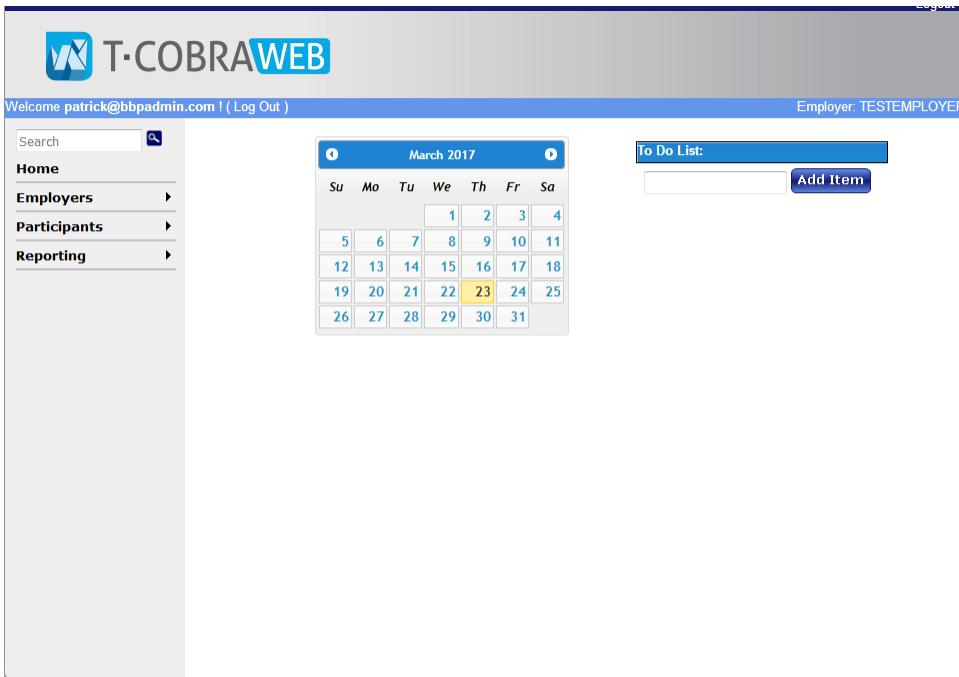
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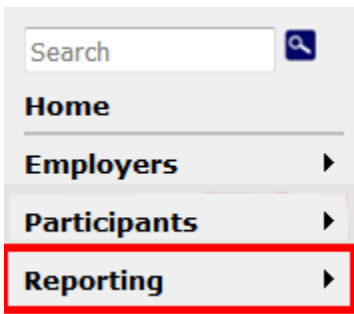
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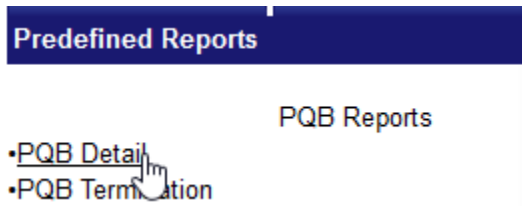


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On the left hand side you will find all of your menu options. Under Reporting you will be able to run ACA figures, generate PQB Enrolled reports or view a comprehensive list of COBRA activity based on the date range of your choice. **Choose Reporting -> Predefined Reports**



The PQB Detail is the first listing under the PQB Reports category.

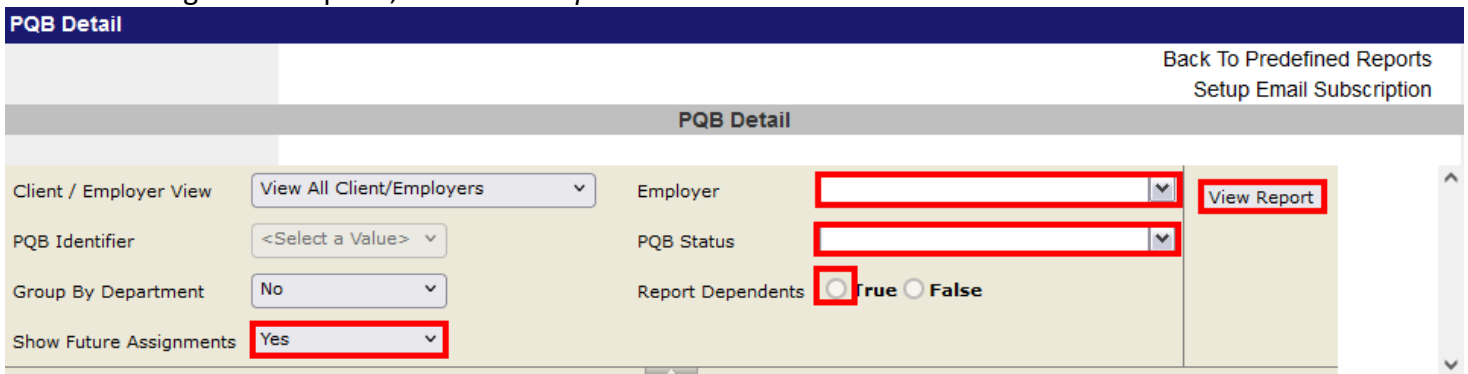


Adjust the fields below:

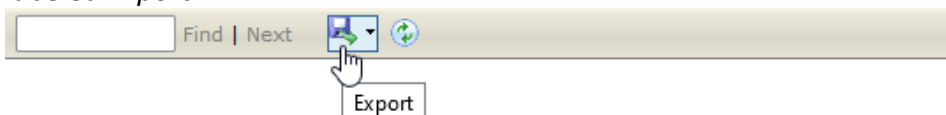
PQB Status: Best practice is to check all statuses with the word “Enrolled” and “Notified Awaiting Response”, this captures all PQB’s enrolled in COBRA/State Continuation and those in their 60-day election period. Or Select All. [Click to remove Terminated and Employee Active (General Rights Notice)]

Future Assignments: Marking Yes will give you all current plans and those elected or assigned at the time of renewal.

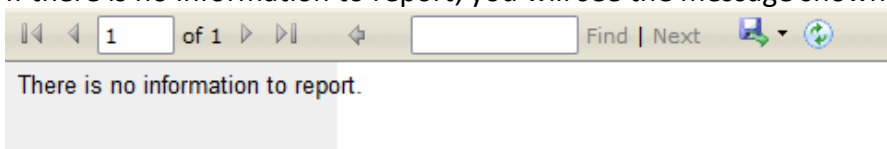
Once settings are complete, Click *View Report*



Results will be viewable through the portal but can also be exported in any format listed in the Disk Icon seen below labeled *Export*.



If there is no information to report, you will see the message shown below.



Employer COBRA Premium Disbursements Report

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On the left-hand side of the screen are the menu options. **Choose Reporting -> Predefined Reports -> Premium Reports**

~Reconciliation By Payments (Voucher Report) (to view detail of premiums by PBQ)

-> Employer dropdown: check your company name

Client / Employer View	<input type="text" value="View All Client/Employers"/>	Employer	<input type="text"/>	<input type="button" value="View Report"/>
Payment On or After	<input type="text"/> <input checked="" type="checkbox"/> NULL	Payment On or Before	<input type="text"/> <input checked="" type="checkbox"/> NULL	
PQB Identifier	<input type="text" value="<Select a Value>"/>	Include Non Cash Payments	<input type="text" value="<Select a Value>"/>	
GroupBy	<input type="text" value="<Select a Value>"/>	Include ARRA Subsidies	<input type="text" value="<Select a Value>"/>	
Include Shortfall Advance	<input type="text" value="<Select a Value>"/>	Include Subsidies	<input type="text" value="<Select a Value>"/>	
Include Voided Payments	<input type="text" value="<Select a Value>"/>	Include Ledger Adjustments	<input type="text" value="<Select a Value>"/>	
Show Fees	<input type="text" value="<Select a Value>"/>	Show Refunds	<input type="text" value="<Select a Value>"/>	

Change the "Payment on or after" date to the 1st of the month (*uncheck NULL box*)

Change "Payment on or Before" date, to the last day of the month (*uncheck NULL box*)

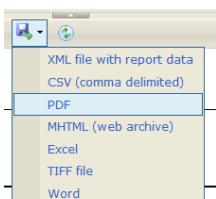
(The 1st of the month may need to be adjusted back a month or two, if money had not been previously disbursed)

Invoice On or After	<input type="text" value="5/1/2017"/> <input type="checkbox"/> NULL	Invoice On or Before	<input type="text" value="6/30/2017"/> <input type="checkbox"/> NULL
---------------------	---	----------------------	--

You can also change these options to "No" if needed:

Payment On or After	<input type="text" value="5/1/2017"/> <input type="checkbox"/> NULL	Payment On or Before	<input type="text" value="6/30/2017"/> <input type="checkbox"/> NULL
PQB Identifier	<input type="text" value="SSN"/>	Include Non Cash Payments	<input type="text" value="No"/>
GroupBy	<input type="text" value="None"/>	Include ARRA Subsidies	<input type="text" value="No"/>
Include Shortfall Advance	<input type="text" value="Yes"/>	Include Subsidies	<input type="text" value="Yes"/>
Include Voided Payments	<input type="text" value="Yes"/>	Include Ledger Adjustments	<input type="text" value="Yes"/>
Show Fees	<input type="text" value="Yes"/>	Show Refunds	<input type="text" value="No"/>

Click-> View Report



Once loaded, click the disk icon to download and save.

~Reconciliation By Plan (to view detail of premiums by plan)

-> Employer dropdown: check your company name

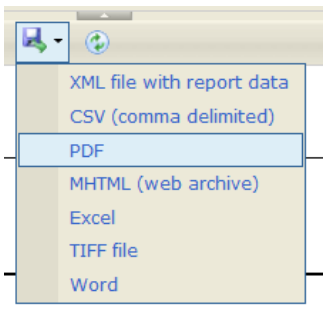
Client / Employer View: View All Client/Employers
Employer: [dropdown]
Invoice On or After: [calendar] NULL
Invoice On or Before: [calendar] NULL
PQB Identifier: <Select a Value>
Group By Department: No
Include Subsidies: Yes
View Report

Change the date to the 1st of the month/ last day of the current month (*uncheck NULL box*) -> Click-> View Report

(The 1st of the month may need to be adjusted back a month or two, if money had not been previously disbursed)

Invoice On or After: 5/1/2017 NULL
Invoice On or Before: 6/30/2017 NULL

Once loaded, click the disk icon to download and save



~Reconciliation By Disbursement (To view amounts of all disbursement totals)

-> Employer dropdown: check your company name

Click-> View Report

Client / Employer View: View All Client/Employers
Employer: [dropdown]
Disbursed On or After: [calendar] NULL
Disbursed On or Before: [calendar] NULL
Time Period: All time periods
Sort By Department: True False
View Report

Once loaded, click the disk icon to download and save

