

**BBP Admin's
Employer User's Guide to**



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Introduction to Employers

Thank you for choosing to use our organization to help meet your COBRA administrative requirements. We utilize the **WebCOBRA** On Demand system to help us in your COBRA administration services. We at BBP Admin is sure you will continue to find this system beneficial and useful to you.

This User's Guide is organized to provide you with a description of how to use BBPadmin's WebCOBRA to your benefit and to navigate the system with ease. The chapters of the guide are presented in the same order you would follow if you were using WebCOBRA for the first time.

Helping our clients understand the functions and benefits available to them and how they work in WebCOBRA has two major benefits:

1. It makes the benefits of utilizing our COBRA administration services with WebCOBRA evident, including the ease of use, time saved, and the ability for complete participant management.
2. By having a COBRA Administrator that utilizes the WebCOBRA system, filling out paperwork for Employees, PQBs, and Dependents and faxing it in is a thing of the past. You can simply log in to add or edit Employees, PQBs, and Dependents with user-friendly, step-by-step processes, run reports, and have your participants log-in and check on their own information!

We encourage you to use what is written in this Employer User's Guide for learning important information about BBPadmin's COBRA administration services utilizing WebCOBRA.

Chapter 1: Getting Started

Purpose of WebCOBRA

For Employers

1. General Notice for Employees (Active Employees)
 - a. Stores Active Employee records and generates a COBRA General Notice.
 - b. Allows you to track correspondence for all of your current Employees.
2. COBRA Participants (Primary Qualified Beneficiaries and Dependents)
 - a. Easily transfer an Active Employee's record when a COBRA qualifying event occurs for that Employee. This person (and their dependents) automatically becomes a Primary Qualified Beneficiary (PQB) in the system, and can now be managed with all the capabilities for administering COBRA to PQBs.
 - b. Once made a PQB, WebCOBRA generates complete COBRA/HIPAA correspondence, tracks payments using an accounting ledger, and includes options for specific state laws, when applicable.
3. Retirees/Direct Bill Participants
 - a. Expand your range of COBRA administration services with the ability to manage Retirees/Direct Bill Participants.
 - b. These participants are managed similarly to PQBs, in that WebCOBRA facilitates the tracking of correspondence, payments, etc.

For Participants

1. Contact Details
 - a. Participants can view their own contact details and then inform their Employer of any changes that need to be made.
 - b. They can also view their COBRA continuation coverage information for record keeping, etc.
2. Payments
 - a. If the option is enabled, electronic payments can be made through WebCOBRA at the participant's convenience.
3. Documents
 - a. Participants can download documents that have been uploaded by the Employer or the Administrator.
 - b. This provides participants with the benefit of viewing their documents for record keeping, information reviewing, etc.

Getting Started in WebCOBRA

This section will walk you through the basic functions of WebCOBRA including:

- **Initial Log-in to the System**
- **Your WebCOBRA Home Screen**
- **Navigating the System**
- **Definitions of Basic Naming Conventions**

Initial Log-in

By now, you should have received an email from do-not-reply@wc2.webcobra.com, welcoming you to BBP Admin. If you have not received it, please check your Spam and/or Junk folders. The temporary password you received will expire in 24 hours, so it is important for you to log-in this first time to avoid delays in the future.

1. Navigate to BBP Admin's website and click on <https://bbp.webcobra.com/Account/Dashboard.aspx>. You will be taken to the BBP Admin WebCOBRA site to complete the log-in process.
2. Manually enter your username, which is included in the email from do-not-reply@wc2.webcobra.com. By convention, your username may likely be the first initial of your first name plus your entire last name, without suffixes such as "Jr.," "Sr.," or "MD." The only exception to this naming convention will be in the case of duplicate user names, which could result in your having to add a number in addition to the primary convention.
3. Copy and paste your Temporary Password from the email, as it is case sensitive and sometimes numbers and letters look alike. Click "Log In."
4. Review the WebCOBRA On Demand End User License Agreement (EULA), and click "Accept" to continue.
5. You will be directed to the "Change Password" screen. Enter the Temporary Password you received in the email in the "Old Password" field. Enter a New Password in the "New Password" field, and then enter it again in the "Confirm New Password" field. Click "Change Password." You will then see a confirmation message: "Your password has been changed successfully."

Now you are in and ready to start working in the system!

Your WebCOBRA Home Screen

Company Logo

Logout 2.0

Welcome JDoe1111 (Log Out) Employer: Example Employer

Search

Home

Employers

Participants

Premiums

Reporting

March 2012

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	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
1	2	3	4	5	6	7

To Do List:

Add Item

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Navigating the System

The following links can be found from your WebCOBRA home screen.

Logout

Click this link to log out of the system.

Search Engine

The WebCOBRA search engine can be accessed from the top of the sidebar. The search engine will search the system and return relevant matches. A SSN, PQBID, full names, or partial names for Participants can be entered as search criteria. After entering the search criteria, click the magnifying glass icon to search or simply press Enter. You may choose how many records to display on a page.



When searching for a Participant, entering the Participant's "(Last Name), (First Name)" into the Search box will take you directly to that Participant's record.

Side Navigation Bar (Sidebar)

The side navigation bar (or "sidebar" as it is referred to in this User's Guide) is always displayed on the left of your screen and allows you to easily navigate through WebCOBRA by hovering over a section of the sidebar and selecting a corresponding link to manage that aspect of your COBRA administration. This User's Guide contains a chapter for each section, explaining the various functions available. The various sections of the sidebar include:

- Home - Clicking this link will direct you back to your WebCOBRA home page.
- Employers
- Participants
- Premiums
- Reporting
- Administration

Calendar

The calendar displays the current month, highlighting the current date in blue.

To Do List

The "To Do List" is located to the right of the Calendar and allows you to enter tasks.

To Add a To Do List Item:

1. From the home screen, in the "To Do List" box, enter an item into the blank field and select "Add Item."
2. The item will now appear in the To Do List box.



The "To Do List" task will remain in the box until you remove it. To remove a task in "My To Do List," select the red "X" next to it.

Definitions

In WebCOBRA, some of the terminology used may be a little different from what you are used to using. This section will help you learn the jargon.

Active Employee: An employee covered under the plan that can be issued a COBRA General Notice and will be eligible to continue coverage under COBRA if they experience a Qualifying Event (QE).

COBRA Participant/Primary Qualified Beneficiary: An individual who is allowed to continue coverage under COBRA and/or state continuation because he/she experienced a Qualifying Event that caused a corresponding loss or reduction of coverage.

Department: In WebCOBRA, a Dependent is a covered dependent; an individual who is covered at the time the PQB experienced a Qualifying Event and may only continue the level of coverage that was in effect on the day of the Qualifying Event. WebCOBRA provides the capability of transferring a Dependent's record into his/her own PQB record, should the Dependent experience a Secondary Qualifying Event.

Retiree/Direct Bill Participant: A former Employee who has retired and is billed directly for their continued health coverage.

Chapter 2: Employers

The Employers section in the sidebar includes:

- View / Edit
- Departments
 - Add New
 - View/Edit

Inside these links, Employer Users can manage their Departments and view information specific to their Employer.

Definitions

- **Departments:** Sub-groups of PQBs or Employees within a specified Employer.

Employers - View / Edit

Selecting this link will take you to your Employer's "General" tab.

View Existing Employer Information

The tabs listed on this page divide up into sections all of the information entered for the Employer. Select the appropriate tab for the information you want to view:

- General
- Options
- Custom
- Department
- Optional Info



Some sections contain general descriptions as well as i-bubble help descriptions. If, after reading the descriptions listed you need further explanation, please click the blue i-bubble help description icon for more information. Click "Close" to close the description box.

General

This tab lists basic details and contact information for the Employer.

The "Employer Detail" section lists the Employer's Name, Code, Status, and Tax ID Code. Address, phone number, email address, and website are listed in the "Employer Contact" section. The "Personnel Contact" section lists contact information such as Name, Title, Email, and Phone Number for this particular Employer. The "Employer Contact" and "Personnel Contact" sections contain the information used to display on letters and notices whenever the "Employer Address" or "Personnel" data fields are inserted into the letter or notice.

Options

In the "Options" tab, you can view the Employer Options that apply to all benefit plans applicable to this Employer. All Employer Options are listed in this tab, including:

- Processing Options
- Letter Options
- Billing Options
- Payment Entry Options
- Default Benefit Plan Options
- State Continuation Options
- Electronic Access Options
- Disbursement Options

You can either click to "Expand All" Option sections or "Collapse All" to close all open sections. Alternatively, you can click a single heading to expand the list of the associated Options.

Also in the Employer "Options" tab, you can click to view the "Options History." Clicking the "Options History" button will direct you to a listing of changes that have been made to Option settings. This listing includes the date the Option was changed, the User that made the change, the section/category and name of the Option, what the old setting was and what it was changed to. Click the "Back to Options Listing" in the upper-right hand corner of the screen to go back to the Employer's "Options" tab.

Custom

In this section, you can view and/or modify certain aspects of the system, including Qualifying Events descriptions, additional User-Defined Fields, System Fields, and you may upload files.

- a. Events - Clicking the "Events" link will direct you to a screen with the descriptions for each Qualifying Event type in the system. Click the "Return to Custom Screen" link in the upper above the list to return to the main "Custom" tab.
- b. User Defined Fields - User Defined Fields (UDFs) are customizable fields that are displayed when adding new PQBs into WebCOBRA. There are many fields used to identify or to designate the PQB such as Social Security number, PQB ID, department or age. If there is another field necessary for this Employer, you can create it within this section of the Employer's "Custom" tab. Examples could include pay scale, location, or anything else that could be specified for Participants within this Employer.
- c. System Fields - Some of the basic terms can be customized in WebCOBRA. You may view the custom field names here.
- d. File Upload - You may upload documents for the Employer.
 - o Upload Files:
 1. From the "File Upload" sub-section of the Employer's "Custom" tab, click "Browse."
 2. Locate and select the file you want to upload, and click "Open."



Files can be no larger than 4MB. If you have a larger file, please contact Customer Support. Large files will take a very long time to upload. Uploading files affects your storage amounts.

3. You may further specify the document by adding a description for the file in the "File Description" box.
 4. Click "Upload File."
 5. A message will appear confirming the file was uploaded successfully.
- o View Uploaded Files:
 1. From the "File Upload" sub-section of the Employer's "Custom" tab, click the "View" link next to the file you want to view.



In order to view uploaded files, you will need to make sure your Security Settings in your browser allow automatic prompting for file downloads. To enable this in Internet Explorer:

1. From the top menu bar in Internet Explorer, click "Tools" and then select "Internet Options."
2. Select the "Security" tab. Click the "Internet" icon, and then click the "Custom Level" button.
3. Scroll down to the "Downloads" section in this dialog box. Select the "Enable" radio button under the heading "Automatic prompting for file downloads."
4. Click "OK" at the bottom to close this dialog box. Click "OK" again to close the "Internet Options" dialog box.

If the User has set "webcobra.com" as a trusted site, then follow the above steps, except click on the "Trusted Site" icon instead of the "Internet" icon in step 2.

Department

Here you can view or add a department. This can also be done from the "Departments" links from the Employers section of the sidebar, which is explained later in this chapter.

If no departments have been created, you will see "There are no Departments Associated to this Employer" and the "Add New Department" button. See the instructions below to begin adding new departments.

- a. View Departments Listing
 1. From the Employer's detail screen, click the "Departments" tab. You will be directed to the Departments listing. Here you can view the Department Name, Code, and the number of Participants assigned to each department.
- b. Add a New Department
 1. From the Employer's detail screen, select the "Department" tab.
 2. Click the "Add New Department" button.



Adding a new department moves away from the Employer's detail screen. This is the "Add New Department" screen.

3. Enter the Department Name and Code.
4. Click "Save" when done or "Cancel" to return to the home screen.
5. A confirmation message will appear - "Department: [Department Name] saved successfully."

Optional Info

Listed in this tab is the optional EDI information for the Employer. This includes Group #/Reference ID, Interchange Sender ID, and Application Senders Code. The i-bubbles give additional information for each of these.

Departments - View / Edit

Departments are a way to divide an Employer. For example, departments could be used as a way to separate an Employer by locations, branches, subsidiary companies, or any other division that works for the needs of the company. Departments are helpful because you can assign benefit plans to a specific department, and you can run many reports by department. In the "Employers" section of the sidebar, you can manage the departments and add new departments.

Departments - Add New

1. From the Employers section of the sidebar, select the "Departments - Add New" link, or you can add a department from the Employer "Department" tab as explained earlier in this chapter.
2. Enter the Department Name and Code.
3. Click "Save" when done or "Cancel" to return to the home screen.
4. A confirmation message will appear - "Department: [Department Name] saved successfully."

Departments - View/Edit

Select this link in the Employers section of the sidebar to see a listing of every Department to which you have access and the various processes that can be performed.

The Department listing can be sorted alphabetically/numerically by each heading, "Department Code" or "Department Name." Simply click on the heading by which you wish to sort the list of departments, and the screen will refresh to reflect that order.

From the Department listing you can:

- Edit Existing Departments
- Delete a Department
- Assign Participants to a Department

Edit an Existing Department:

1. From the Employers section of the sidebar, select the "Departments - View/Edit" link.
2. Select the "Edit" link next to the department you want to alter.
3. You will be directed to the individual Department's Information screen. There are three sections of information listed:
 - Department Detail (Employer Name, Department Name, and Department Code)

- Department Contact (You can enter/edit address, phone number, email, and website information for the department.)
- Personnel Contact (You can enter/edit the name, title, email, and phone number for each contact within that department.)

Edit the sections by clicking the "Edit" button below that particular section. When done editing the section, click "Save" to save the changes, or click "Cancel" to cancel the changes.

Delete a Department:

1. From the Employers section of the sidebar, select the "Departments - View/Edit" link.
2. Select the "Delete" link next to the department you want to delete.
3. A pop-up window will appear explaining that deleting the department will remove the department assignment from any Participant currently assigned. Click "Confirm" to continue with the deletion.
4. You will be directed back to the Department listing, and the deleted department will no longer appear.

Assign Participants to an Existing Department

1. Select the "Cobra Participants - View/Edit" link in the Participants section of the sidebar, and select the Participant's record from the listing.
2. From the Participant's "Details" tab, click the "Edit" button below the first "Detail" section.
3. Choose the department to which you wish to add the Participant from the Department drop-down list. This list will contain all the existing departments. Please see the instructions above for adding a department.
4. Once you have selected the department, click the "Save" button.

Chapter 3: Active Employees

The Active Employees section in WebCOBRA will allow you to add new, view, and edit these different types of Participants to the system. Employees that are added into the system can be converted to PQBs with COBRA coverage quickly and easily.

For information about COBRA Participants or PQBs (and their Dependents), refer to the "COBRA Participants" chapter in this User's Guide. [For more information about Retirees/Direct Bill Participants, refer to the "Retirees/Direct Bill Participants" chapter in this User's Guide.]

Employees – Add New

This selection will take you directly to the "Employees – Add New" page. From this page you can:

- Add New Employees
- Transfer a COBRA Participant to Active Employee Status (Rehire Process)

Add a New Employee

1. From the Participants section of the sidebar, select "Employees" and then "Add New." (You may also add an Employee from the Active Employees listing by selecting "Employees" and then "View/Edit," and click the blue "Add New Active Employee" button.)
2. Add New Active Employee: The Employer field will be pre-populated with your Employer name. Select a Department (optional) to which you want to add the Employee.



If you are transferring a PQB to Employee status, click the "Transfer COBRA Participant to Active Employee" button and follow the instructions in the section "Transfer a COBRA Participant to Active Employee Status" later in this chapter.

3. Enter the Active Employee Information, Contact Information, Creditable Benefit Coverage Information, Retroactive Information (if applicable).



If you enter a date in the "Date COBRA General Notice was sent" field, NO COBRA General Notice will be generated by the system.

4. When you are done entering information for the above sections, click the "Continue to Dependents" button at the bottom of the screen. If you would like to save this Employee record as is and not add Dependents at this time, click the "Done - Save Active Employee" button.

5. Enter the Dependent's information.



If you selected "Yes" to the "Email Available Letters" setting when entering information for the Active Employee's record associated with this Dependent, AND you selected "Yes" for this Dependent to "Receive own copy of correspondence," you will need to enter an email address into this field.



Select "Yes" to the "Use Active Employee Address" setting if the mailing address for this Dependent is the same as the Active Employee's. If it is not, select "No," and the page will expand to allow you to enter the Dependent's address information.

6. When you are done entering information for the Dependent, click the corresponding button:
 - Save this Dependent's information and add another Dependent to the record.
 - Done - Save Active Employee (and any Dependents that were entered).
 - Return to Active Employee (Review/edit information entered for the Employee.)
 - Cancel Entry (Cancel the entry of this Dependent's information.)

7. Once you are done and click "Done - Save Active Employee," a pop-up window will appear confirming that the Active Employee Record was successfully added to the system. This window will also list links that will allow you to execute Suggested Next Steps, including:
 - View Active Employee Record
 - Add Another Active Employee
 - Return to Active Employee Listing
 - Return to the Home Page

Transfer a COBRA Participant to Active Employee Status (Rehire Process)

1. From the Participants section of the sidebar, select "Employees" and then "Add New." (You may also add an Employee from the Active Employees listing by selecting "Employees" and then "View/Edit," and click the blue "Add New Active Employee" button.)
2. Add New Active Employee: The Employer field will be pre-populated with your Employer name. Select a Department (optional) to which you want to add the Employee.
3. Click the "Transfer COBRA Participant to Active Employee" button.
4. A pop-up window will appear. Enter the Participant's name you are transferring and click "Search."
5. Select the Participant's name from the list that appears, and then click "Review Selection."
6. General information about the Participant will appear. Review this information to be sure this is the PQB you want to transfer and click "Continue."
7. You will be directed back to the "Active Employee - Add New" screen. Some fields will be pre-populated with information from the PQB record. The steps for transferring this PQB to an Employee are the same as adding a new Employee to the system, as described in the "Add New Employee" section above. You will need to enter the Creditable Benefit Coverage information for the new Employee.



Be sure to review (and edit if needed) all of the fields and pre-populated information to be sure they are correct before adding this Employee.

Employees – View/Edit

Under this selection you will see a listing of every Employee (and their Dependents) to which you have access.

From this screen you can:

- View the Employee Listing
- Add New Employees
- Edit Existing Employees
- Add Dependents to an Employee Record
- Assign an Employee to a Department
- Transfer an Employee record to a COBRA Participant record

View Employee Listing

From this link you will be directed to the Employee listing, which displays every Employee and Dependent to which you have access. The Employer, Participant Name, Employee ID/SSN, Job Title, and Status are shown for each record. Click on one of the headings to sort the listing.

1. From the Participants section of the sidebar, select "Employees" and then click "View/Edit."
2. You will be taken to the listing of all Employees and Dependents. From this screen you can:
 - Sort the listing by one of the headings, choose to identify Employees by Employee ID or SSN, and/or check the box to list Rehired Employees only.
 - Add a New Employee
 - Transfer a COBRA Participant to an Active Employee Record
 - View or edit individual Employee records

The following describes each of these features and includes steps on how to execute them.

Add New Employees

Please refer to the "Employees – Add New" section above for detailed instructions on adding an Employee to the system.

Edit Existing Employees

1. From the Participants section of the sidebar, select "Employees" and then click "View/Edit." You will be directed to the Employee Listing.



You can limit the number of Employee records you are viewing by selecting the number of records to display from the drop-down box on the right-hand side of the screen.

2. Select the "View/Edit" link of the Employee you would like to edit.

Select the appropriate tab for the information you want to edit for this Employee:

Details

This tab lists basic details and contact information for the Employee. Also listed is Coverage and Dependent information. To edit any of this information, click the "Edit" button below that section. When done making changes, click "Save."

- a. Active Employee Detail - This section includes the Employee Relationship, Department, Age, Employee ID, Gender, Hire Date, Participant ID, SSN, Date of Birth, Suffix, Title, Annual Salary, Core Coverage Start Date, Months and Days of Core Coverage, and Months and Days of Pre-Existing Condition Exclusion.
- b. Dependent Detail – If this Employee has Dependents, their information will be listed here.
- c. Setting Detail - Settings listed include the ability to indicate whether the Employee:
 - o Receive Emails - If the Employee can receive emails, select "Yes" for the "Receive Emails" setting. The email address for the Employee can be entered during the Active Employee Add process, or it can be entered once the record is added, under the "Contact" tab. The "Enable Emailing of Letters" Employer Option must be activated.
 - o Include in Address – Set this to "Yes" if Dependent's address is the same as the Employee's.
 - o Correspondence Language - Choose from the drop-down list what language you want correspondence to be in ("English" or "English and Spanish").
 - o Receive Letter Copies - Select whether you want Dependents to receive their own copies of letters generated.
 - o Print 'And Dependents' - 'And Dependents' will print on letters after the Employee's name in correspondence.

Contact

Contact information for the Employee and any Dependents is listed here. This includes Address, Phone number, and Email address.

- a. Active Employee Contact Information - To edit any of this information, click the "Edit" button below that section. When done making changes, click "Save."
- b. Dependent Information (If applicable) - To view the Dependent's contact information, you may click the Dependent's name to go to his/her individual "Contact" tab.

History

- a. Reports - The reports listed will generate the information for the individual Employee.
- b. History – Events that occur with this Employee will be automatically logged and listed in this section. Some of the events that will be logged include:
 - o Initial Employee entry.
 - o Address change. The address before and after the change is displayed.
 - o Letters that were accepted.
- c. File Upload - You may upload documents for the individual Employee, such as signed forms sent to you by the Employee.
 - o Upload Files:
 1. From the "File Upload" sub-section of the Employee's "History" tab, click "Browse."
 2. Locate and select the file you want to upload to the Employee's History, and click "Open."



Files can be no larger than 4MB. If you have a larger file, please contact Travis Support. Large files will take a very long time to upload. Uploading files affects your storage amounts.

3. You may further specify the document by adding a description for the file in the "File Description" box.
 4. Click "Upload File."
 5. A message will appear confirming the file was uploaded successfully.
- o View Uploaded Files:
 1. From the "File Upload" sub-section of the Employee's "History" tab, click the "View" link next to the file you want to view.



In order to view uploaded files, you will need to make sure your Security Settings in your browser allow automatic prompting for file downloads. To enable this in Internet Explorer:

1. From the top menu bar in Internet Explorer, click "Tools" and then select "Internet Options."
2. Select the "Security" tab. Click the "Internet" icon, and then click the "Custom Level" button.
3. Scroll down to the "Downloads" section in this dialog box. Select the "Enable" radio button under the heading "Automatic prompting for file downloads."
4. Click "OK" at the bottom to close this dialog box. Click "OK" again to close the "Internet Options" dialog box.

If the User has set "webcobra.com" as a trusted site, then follow the above steps, except click on the "Trusted Site" icon instead of the "Internet" icon in step 2.

- o Delete Uploaded Files:
 1. From the "File Upload" sub-section of the Employee's "History" tab, click the "Remove" link next to the file you want to delete.
 2. A message will appear confirming the file was deleted successfully.

Actions

Record Actions - the following options can be performed from this tab:

- a. Add Dependent - Please refer to the "Add a Dependent to an Employee Record" section below for step-by-step instructions.

Notes

- a. You may enter comments or any other additional information regarding this Employee. For example, you may include a call log, email trails, or instructions for other Users. A date and time stamp is automatically created when a note or appended information is saved. There is a limit of 7000 characters per note.
 - o Add a New Note
 1. Click the "Add New Note" button.
 2. Enter the Note information into the box.
 3. Click "Save Active Employee Note" when done.
 - o Append a Note
 1. Click the "Append" link next to the note to which you want to add more information.

2. Enter the additional information into the box, and click "Save Active Employee Note."
3. You may view the appended information by clicking the + sign next to the name of the original note.
- o Delete a Note
 1. Click the "Delete" link next to the note you want to delete.
 2. A pop-up window will appear asking "Are you sure you want to delete this note? Please confirm." Click "Confirm" to delete the note.



You cannot delete appended information from a note. You must delete the entire note to delete appended information.

Add a Dependent to an Employee Record

1. From the Participants section of the sidebar, select "Employees" and then click "View/Edit."
2. Select the "View/Edit" link next to the Employee to which you want to add a Dependent.
3. Select the "Actions" tab, and click the "Add Dependent" link.
4. Enter the following information for the Dependent:
 - Participant First and Last Name (required)
 - Date of Birth (required)
 - Relationship
 - Dependent ID
 - SSN
 - Gender
 - Email Address
 - Should a new General Notice be generated? (Y or N)
 - Should this Dependent receive their own copy of correspondence? (Y or N)
 - Should this Dependent have the same address as the main Employee's address? (Y or N)
 - Phone Number
5. When done entering this information, click the "Save Dependent" button.

Assign Active Employee to a Department

1. From the Participants section of the sidebar, select "Employees" and then click "View/Edit."
2. Select the "View/Edit" link next to the Employee record to which you want to assign to a Department.
3. From the Employee's "Details" tab, click the "Edit" button in the "Active Employee Detail" section.
4. Click the "Save" button when done.



A Department must be created at the Employer level to be able to assign the Employee to a Department. For instructions on adding a Department, please refer to the Employers chapter.

Transfer Active Employee to COBRA Participant

Please refer to the "COBRA Participants" chapter, under the "Transfer Active Employee to COBRA Participant" heading for detailed instructions on transferring an Active Employee record to a COBRA Participant record.

Chapter 4: COBRA Participants

The COBRA Participants section in WebCOBRA will allow you to Add New, View, and Edit Primary Qualified Beneficiaries (PQBs) and their Dependents in the system. [For information about Retirees/Direct Bill Participants, refer to the "Retirees/Direct Bill Participants" chapter in this user's guide.]

COBRA Participants – Add New

Add a New PQB

1. From the Participants section of the sidebar, select "Cobra Participants" and then click the "Add New" link. You may also add a new PQB from the PQB listing by clicking the "Cobra Participants - View/Edit" link and then the "Add New PQB" button.
2. You will be directed to the "PQB and Dependents - Add New" page.
3. **Complete Step 1 - PQB**
 - a. Add New PQB
 - Select a Department to which you want to add the PQB (if applicable). For instructions on adding Departments to an Employer, please refer to the "Departments" section of the "Employers" chapter.
 - If this PQB is an existing Employee in WebCOBRA and has experienced a Qualifying Event, you may transfer his/her existing Active Employee data to a COBRA Participant record. For more instructions on transferring an Active Employee to a COBRA Participant, please see the "Transfer Active Employee to COBRA Participant" section below.
 - b. Special Situations
 - Select "Yes" to any of the Special Situations listed that apply to the PQB you are entering.
 - Denial of Coverage (Yes or No)
 - Customize Election Letter (you may include special wording in this PQB's Election Notice to inform he/she of special situations such as Severance) (Yes or No)
 - Quick Certificate (Yes or No)



By default, all of these Yes/No questions are set to "No."

- c. PQB Information
 - First, Middle Initial, Last Name (required)
 - Date of Birth (MM/DD/YYYY) (required)
 - PQB ID
 - Social Security Number
 - Employee ID
 - Gender
 - Title - If the Title is set to "None," only the PQB's last name will appear after the greeting in letters. For example, "Dear Smith."
 - Annual Salary (Required for Life Insurance, AD&D, and Disability)
 - Years of Service
 - Original Hire Date

d. Contact Information

- Address Line 1 (required)
- Address Line 2
- City (required)
- State/Province
- Zip/Postal Code (required)
- Country
- Phone Number
- Email Available Letters (Yes or No)
- Email Address (Required if Correspondence is going to be sent electronically to this PQB)

e. Takeover/Retroactive Information (Not required for New Qualifying Events) - This section is to be completed if the PQB has already been notified of their eligibility of COBRA coverage (retroactively) or if you are taking over the administration of COBRA benefits for a PQB. Click the section header to expand the section and enter applicable information.

- PQB Enrolled & Paid Through Date
- Eligibility Notice Mailed Date
- Enrollment Form Received Date
- Incomplete Enrollment Form Received Date
- Applied for Trade Assistance (Yes or No)
- Print a Takeover Letter (Yes or No)

f. Additional Actions

- Enroll with 100% Subsidy (Yes or No)
- Print a Premium Coupon Set (Yes or No)
- Medicaid Participant (Yes or No)
- Print "And Dependents" (Yes or No)
- Indicate if this PQB is "On Hold" and enter the date he/she will be On Hold until
- Indicate if Social Security Disability applies

4. When you are done entering this information, you may click the "Continue to Event" button to begin entering Qualifying Event information, or if you would like to stop here, click "Done - Save PQB."

5. **Complete Step 2 - Event**

1. Qualifying Event

- Qualifying Event Type (required) - Qualifying Event Types include:
 - Termination
 - Retirement
 - Medicare Entitlement
 - Death
 - Becoming an Ineligible Dependent
 - Reduced Hours
 - Leave of Absence - Family/Medical
 - Divorce/Separation
 - Loss of Coverage
 - USERRA
 - Termination with Severance
 - Reduction of Hours – Strike
 - Layoff
 - Disability
 - Employer Bankruptcy
 - Plan Termination
 - TX Labor Disputes
 - Sabbatical
 - Employer Ceasing Operations

- Termination by Insurer
 - Qualifying Event Date (MM/DD/YYYY) (required)
 - What day was the administrator notified (required) - The default setting is the date the PQB is added to the system.
 - Event Description (optional) - The default setting is the Qualifying Event Type, however you may change this description if you choose.
 - 2. When done entering the Event information, you may choose to "Continue to Dependents," "Return to PQB" step, or to stop here and save, click "Done - Save PQB."
6. **Complete Step 3 - Dependents** - You may skip this step and move on to **Step 4 - Benefits** if there are no Dependents for this PQB or if you do not want to add any Dependents to this PQB at this time. You will have the opportunity to add another Dependent if you choose. You may also add Dependents after adding the PQB.
- a. **Dependent Information** - Once you add a new Dependent's information, that Dependent will be listed here. If you need to remove a dependent during the PQB Add process, there will be a "Remove Dependent" link listed next to each entered Dependent.
 - b. **Add New Dependent** – Enter the following information:
 - First, Middle Initial, Last Name (required)
 - Date of Birth (required)
 - Relationship to the PQB - Choose from:
 - Not Specified
 - Spouse
 - Son
 - Daughter
 - Dependent (This is the default setting)
 - Deceased
 - Domestic Partner
 - Former Employee
 - Child
 - Domestic Partner's Child
 - ID Number
 - SSN
 - Gender
 - Email Address (Required if Correspondence is going to be sent electronically to this Dependent)
 - Receive Own Copy of Correspondence (Yes or No) - The default setting is "No."
 - Use PQB Address (Yes or No) - The default setting is "Yes." If you select "No," an expanded area will appear to allow you to enter the dependent's address.
 - c. When done, you can either click "Save and Add Another Dependent" if you would like to add an additional dependent, or click "Continue to Benefits."
7. **Complete Step 4 - Benefits**
- a. **Benefit Assignment** - Once you assign a Benefit Plan to the PQB, that Benefit Plan assignment will be listed here. You will have the opportunity to add another Benefit Plan assignment if you choose. If you need to remove a Benefit Plan assignment during the PQB Add process, there will be a "Remove Plan" link listed next to each assigned Benefit Plan.
 - b. **Benefit Plan Section**
 - Insurance Carrier (required) – All available Insurance Carriers associated with your Employer are listed here.
 - Benefit Plan (required) - The choices you have are based on which Benefit Plans are assigned to the Carrier selected above.
 - Coverage Level (required) - These choices are based on which Benefit Plan you selected.

- For example, if the Benefit Plan you selected has a Tier Based costing method, you will select one of the coverage level tiers. If you the Benefit Plan you selected has a "Determined Per Participant" costing method (Flat fee), you will specify the participant's monthly premium amount. The administrative fee will be added to this amount.
- c. Coverage Start Information
 - Based on the Employer's Option setup and Qualifying Event information entered, the following dates will be listed:
 - Continuation Coverage Period
 - First Day After Loss of Coverage (LOC)
 - Continuation Coverage End Date
 - The next three fields are also auto-populated based on previous information entered, but you can edit these fields if you choose.
 - Continuation Coverage Eligibility Date (required) - This is the date on which the PQBs will begin coverage for this benefit. It must be after either the Event Date or later than this plan's last assignment end date and before the COBRA Coverage End Date.
 - Premium Billing Start Date (required) - This is the date on which the PQBs will start to pay premiums for this plan. Typically this will be the same as the First Day After Loss of Coverage, but does not have to be. This date must be after the Event Date and before or on the end of continuation coverage.
 - Fee Start Date (required)
 - Waiting Period Before Coverage Began (select a time period from the drop-down list)
 - 18 Months of Prior Coverage (Yes or No) (required)
- d. Subsidy Information
 - Is this Premium Subsidized (Yes or No) - The default setting is "No."
 - If this is set to "Yes," an expanded area will appear, asking for the following information:
 - Type of Subsidy - The default setting is "Employer."
 - Subsidy Description
 - Date Subsidy will Begin (required)
 - Date Subsidy will End



If a subsidy ends in the middle of the month, WebCOBRA will calculate the last month the subsidy is in effect as follows: Subsidy amount divided by the number of days in the month, multiplied by the number of days the subsidy is in effect. The subsidy amount is then subtracted from the monthly premium to get the premium due for the month.

- Form of Subsidy (required) - This can be either a fixed amount or percentage.
- Subsidy (required) - Enter either as a fixed dollar amount - \$XX.XX or a percentage – X%, based on the form of subsidy chosen above.



If a fixed flat amount is entered, WebCOBRA will calculate the subsidy by subtracting the amount entered from the premium (not including 2% administrative fee). The result is then subtracted from the premium amount, and the 2% administrative fee is added to equal the subsidized monthly premium.



If a percentage is entered, WebCOBRA calculates the subsidy by taking the percentage entered off the premium (not including 2% administrative fee). The result is then subtracted from the premium amount, and the 2% administrative fee is added to equal the subsidized monthly premium.

- You may click the "Add Additional Subsidy" to add another subsidy and repeat the process.

- e. Individual Assignment Information
 - This section lists the Participants you are adding to the system that could be assigned to the Benefit Plan, including the PQB and any Dependents added. You must assign at least one Participant to the Benefit Plan to save it.
 - Select "Yes" next to the Participants you want to assign to the Benefit Plan.
 - You may then select to "Save and Add Another Plan."
8. When you are done, click the "Done - Save PQB" button to finish.
9. A pop-up window will appear stating, "New Participant record successfully saved." Suggested next steps include:
 - View PQB Record
 - Add Another PQB for This Employer
 - Return to PQB Listing
 - Return to the Home Page

Transfer an Active Employee to a COBRA Participant

1. From the Participants section of the sidebar, select the "Cobra Participants - Add New" link. You may also add a new PQB from the PQB listing by clicking the "Cobra Participants - View/Edit" link and then the "Add New PQB" button.
2. You will be directed to the "PQB and Dependents - Add New" page.
3. **Complete Step 1 - PQB**
 - a. Add New PQB
 - Select a Department to which you want to add the new PQB (if applicable). For instructions on adding Departments to an Employer, please refer to the "Departments" section of the "Employers" chapter.
 - Click the "Transfer Active Employee to COBRA Participant" button.
4. A pop-up window will appear where you can enter and search for the Employee's name you want to transfer to PQB status. Enter their first or last name and click "Search."
5. Select the Employee's name from the list that appears and then click "Review Selection."
6. General information about the Employee will appear. Review this information to be sure this is the Employee you want to transfer and click "Continue."
7. You will be directed back to the "PQB and Dependents - Add New" screen. Some fields will be pre-populated with information from the Employee record. The steps for transferring this Employee to a PQB are the same as adding a new PQB to the system, as described in the "Add a New PQB" section above. You will need to enter the Qualifying Event and Benefit Plan information for the PQB.



Be sure to review (and edit if needed) all of the fields and pre-populated information to be sure they are correct before adding this PQB.

COBRA Participants/PQBs - View/Edit

View PQB and Dependents Listing

From this link you will be directed to the PQB listing, which displays every PQB and dependent to which you have access, separated by Employer. The Employer, Participant Name, Type (PQB and Dependent), PQB ID/SSN, and Status are shown for each record. Click on one of the headings to sort the listing.

1. Click the "View / Edit" link beneath "Cobra Participants" in the Participants section of the sidebar.
2. You will be taken to the listing of all PQBs and dependents. From this screen you can:
 - Sort the listing by choosing whether to identify PQBs by PQB ID or SSN, and/or selecting certain statuses by which to filter PQBs.
 - View Rehired PQBs by clicking "View/Edit Rehired PQBs"
 - Add a New PQB
 - Transfer an Active Employee to a COBRA Participant
 - View or edit individual PQB records

The following describes each of these features and includes steps on how to execute them.

Add a New PQB

Refer to the instructions mentioned above under the "Add a New PQB" section in the "Cobra Participants – Add New" link. You can go directly to this page from either the "Cobra Participants - Add New" link in the sidebar, or go to the "Cobra Participants - View/Edit" link in the sidebar and click the "Add New PQB" button from the PQB listing screen.

Transfer Active Employee to COBRA Participant

Please refer to the instructions mentioned earlier in this chapter under the "Transfer Active Employee to COBRA Participant" heading of the "Cobra Participants - Add New" section.

View/Edit Rehired PQBs

1. From the Participants section of the sidebar, select the "Cobra Participants - View/Edit" link. You will be directed to the PQB listing.
2. Click "View/Edit Rehired PQBs." You will be directed to a page showing PQBs who have since been rehired and are now Active Employees. You may sort these records by:

- Employer
 - Show Rehired Employees only
 - Identify Employees by Employee ID or SSN
3. From here you may add new Active Employees by clicking the "Add New Active Employee" button. Please refer to the "Employees - Add New" section in this chapter for further instruction.

Edit an Existing PQB

1. From the Participants section of the sidebar, select "Cobra Participants" and then "View/Edit." You will be directed to the PQB listing.
2. Select the PQB or dependent you would like to edit by clicking either their last name or the "View/Edit" link next to the PQB's or dependent's record. You will be directed to their individual "PQB and Dependents" detail page.
3. At the top of the page, you will see the PQB's name and basic enrollment information, such as the PQB's Status, SSN, PQB ID, Qualifying Event Date, First Day After Loss of Coverage, Enrollment Period End Date, Paid Through Date, Current Account Balance, and Typical Monthly Premium. This information will remain visible while accessing each tab.
4. The tabs listed on this page contain all of the PQB's information. Select the appropriate tab for the information you want to view or edit for this PQB or Dependent:
 - Details
 - Contact
 - Event
 - Benefits
 - Premiums
 - History
 - Actions
 - Notes



Some sections contain general descriptions as well as i-bubble help descriptions. If, after reading the descriptions listed you need further explanation, please click the blue i-bubble help description icon for more information. Click "Close" to close the description box.

Details

This tab lists basic details and contact information for the PQB. Also listed is Enrollment and Dependent information. To edit any of this information, click the "Edit" button below that section. When done making changes, click "Save."

- a. PQB Detail - This section includes the PQB Relationship, Department, Event Date, First Day After Loss of Coverage, Employee ID, Gender, Hire Date, PQB ID, SSN, Date of Birth, Scheduled Continuation End, Suffix, Title, and Annual Salary. Because they are based on the

Qualifying Event information entered for the PQB, the Event Date, First Day After Loss of Coverage, and Scheduled Continuation End Date cannot be edited.

- b. Enrollment Detail - Enrollment End Date, Days Left to Enroll, and Minimum Amount Due to Enroll details can be found here. This section cannot be edited.
- c. Dependent Detail - Here you will find all the Dependents associated with this PQB. You can click on the Dependent's name to go to his/her individual record. You may also add a dependent from this section by clicking the "Add Dependent" button. For more information on adding additional dependents to a PQB, please see the "Add Additional Dependents to a PQB Record" section below.
- d. Setting Detail - Settings listed include the ability to indicate whether the PQB:
 - Medicaid Participant - If the PQB is on Medicaid, select "Yes" for the "Medicaid Participant" setting. This is for record keeping only.
 - On Hold - The On Hold setting is used to prevent a PQB from being automatically terminated via Automatic Processing, regardless of the reason for termination. You can either enter a date that the PQB will be On Hold until or simply select the "Yes" option for this setting.
 - Receive Emails - If the PQB can receive emails, select "Yes" for the "Receive Emails" setting. The email address for the PQB can be entered during the PQB Add process, or it can be entered once the record is added, under the "Contact" tab. The "Enable Emailing of Letters" Employer Option must be activated.
 - On SS Disability - If the PQB is eligible for the Social Security Disability extension of an additional 11 months of COBRA coverage, select "Yes" for the "SS Disability" setting. Once activated, the Social Security Disability extension will become effective after the 18 months of federal COBRA period has been exhausted. The Social Security Disability extension administration fee is entered at the Benefit Plan level.
 - Correspondence Language - Choose either English or English and Spanish.



A certain Employer Option must be set in order for the "English and Spanish" setting to be available. Please contact your administrator for more information.

- Receive Letter Copies - If this is a Dependent record, select "Yes" if the Dependent should receive his/her own copies of letters.
- Print "And Dependents" - If this is the main PQB and the PQB has Dependents, select "Yes" if you would like the wording "And Dependents" to appear after the PQB's name on his/her letters.
- Experienced Event - This denotes whether the PQB experienced the event. For the primary PQB, this setting will be set to "Yes." For Dependents of the PQB, this setting will be set to "No," unless they have experienced a qualifying secondary event. This option cannot be edited.
- Include in Address - This will be set to "Yes" if a Dependent's address is the same as the PQB's.
- Billing Contact - Set this to "Yes" if this Participant is the billing contact.

Contact

Contact information for the PQB and any dependents is listed here. This includes Address, Phone number, and Email address.

- a. PQB Contact Information - To edit any of this information, click the "Edit" button below that section. When done making changes, click "Save."
- b. Dependent Information (If applicable) - To view the Dependent's contact information, you may click the Dependent's name to go to his/her individual "Contact" tab.

Event

- a. Qualifying Event Information - Displayed here is the PQB's Qualifying Event Description, Date, and Date the Administrator was notified.



This information can only be edited if the PQB has not yet been notified of Continuation Eligibility. If the PQB has already been notified, the Qualifying Event information may no longer be altered.

- Edit Qualifying Event Information (if applicable)
 1. Click the "Edit" button. A pop-up window will appear stating, "This function may be used to change event type or date." It will also give a description of what changes will be made in the system by editing this information:
 - Alteration of Event Information (This includes the length of coverage given, which varies depending on the Qualifying Event.)
 - Recalculation of all Benefit Assignments
 2. Click "Confirm" to continue with the Event Edit. Click "Cancel" to go back to the PQB's "Event" tab.
 3. Once you have made your changes, click "Save."

Benefits

- a. Benefit Assignment Information
 - From this tab, you can view existing Benefit Plan assignments.
 - Each Benefit Plan to which the PQB is assigned is listed in this table. Information listed includes Carrier, Benefit Plan Name, Coverage Leave, Monthly Premium Amount, Billing Start Date, Federal End Date, and Admin Fee (if any).
 - To view a Benefit Plan assignment's details for this specific PQB, click the "View/Edit" link next to the Benefit Plan. Details for this Plan will be listed. Click the link in the upper right-hand corner to "Return to Assignment Listing."

Premiums

The PQB's "Premiums" tab contains basic payment information for the PQB and the PQB's Ledger. To view one of these sections, simply click the section header to expand it. None of this information may be edited.

- a. PQB Accounting Ledger – Listed in this section is the PQB's last payment received date, first possible termination date, and current account balance.
- b. Ledger View - The PQB's ledger includes details such as payment dates, type of payment, description, charges/payment amount, account balance, and if the amount should not be disbursed.



Subsidies will appear on the ledger as individual entries.

- View Plan Detail:
 1. Click the "Plan Detail" link in the "Description" column of the charge for which you want to view Benefit Plan details.
 2. The Description section will expand to show the applicable admin fee and premium amount that are included in the charge.
 3. You can click the "Plan Detail" link again to hide this information.

History

a. Participant History

- Reports - The reports listed will generate the information for the individual PQB. These reports can also be accessed at the Employer Level from the "Predefined Reports" link in the Reporting section of the sidebar.
- History - The following events listed are automatically logged in this History section. Previously generated correspondence PDFs may be viewed by clicking the "View" link.
 - Initial PQB entry, date the eligibility notice was printed and the date the enrollment form was received.
 - Changes in status.
 - PQB benefit drops and benefit assignments.
 - Global benefit drops and rate changes.
 - Eligibility coverage change.
 - Address change. The address before and after the change is displayed.
 - PQB terminations and reinstatements.
 - Subsidies.
 - Refunds and Refund Checks.
 - Activation of Social Security Disability extension and Medicaid.
 - PDF copies of letters accepted are stored.
- File Upload - You may upload documents for the individual PQB, such as signed forms sent to you by the PQB.
 - Upload Files:
 1. From the "File Upload" sub-section of the PQB's "History" tab, click "Browse."
 2. Locate and select the file you want to upload to the PQB's History, and click "Open."



Files can be no larger than 4MB. If you have a larger file, please contact Travis Support. Large files will take a very long time to upload. Uploading files affects your storage amounts.

3. You may further specify the document by adding a description for the file in the "File Description" box.
 4. Click "Upload File."
 5. A message will appear confirming the file was uploaded successfully.
- View Uploaded Files:
 1. From the "File Upload" sub-section of the PQB's "History" tab, click the "View" link next to the file you want to view.



In order to view uploaded files, you will need to make sure your Security Settings in your browser allow automatic prompting for file downloads. To enable this in Internet Explorer:

1. From the top menu bar in Internet Explorer, click "Tools" and then select "Internet Options."
2. Select the "Security" tab. Click the "Internet" icon, and then click the "Custom Level" button.
3. Scroll down to the "Downloads" section in this dialog box. Select the "Enable" radio button under the heading "Automatic prompting for file downloads."
4. Click "OK" at the bottom to close this dialog box. Click "OK" again to close the "Internet Options" dialog box.

If the User has set "webcobra.com" as a trusted site, then follow the above steps, except click on the "Trusted Site" icon instead of the "Internet" icon in step 2.

- o Delete Uploaded Files:
 1. From the "File Upload" sub-section of the PQB's "History" tab, click the "Remove" link next to the file you want to delete.
 2. A message will appear confirming the file was deleted successfully.

Actions

- a. Record Actions - the following options can be performed from this tab:
 - Add Dependent - You can add additional dependents for this Participant that were not included in the original PQB Add process. This can be done either from the PQB's "Actions" tab or by clicking the "Add Dependent" button on the PQB's "Details" tab.
 1. After clicking this action, the "Dependent Add" screen will appear. Enter the Dependent's information, including Name, Date of Birth, and other personal information. Also you will be asked to indicate if this Dependent should be eligible for a second event and/or receive their own copies of correspondence.



The capability to disallow a dependent from being eligible for a secondary event is related to a part of the COBRA law that limits a dependent who was not covered at the time of the original Qualifying Event from being entitled to extended benefits through a secondary Qualifying Event. For example, if employee X incurred a termination of employment and X's spouse was not covered under the plan at the time of the termination of employment, but was later added to X's COBRA coverage during an open enrollment period, X's spouse would not be entitled to extended coverage because of a divorce within the first 18 months of COBRA coverage.

2. You will then fill out the Dependent's Benefit Plan Assignment information. Some of the information will be auto-populated based on the PQB's Qualifying Event and Carrier information.
 3. When done, click "Save Participant" to add the Dependent.
- Enrollment Form - This action is only available in the "Actions" tab for PQBs and Dependents whose status is "Notified, Awaiting Response." Once the Enrollment Form is received, click this Action. Enter the Enrollment Form Received Date (required), and the Enrollment Form Signed Date and Postmark Date. Check the box if the Enrollment Form is incomplete, and enter any notes of the incomplete form into the blank field. Click "Save" when done.
 - Secondary Event - This action is only available in the "Actions" tab for Dependents who may experience a secondary qualifying event. When a Dependent experiences a Second-

ary Qualifying Event, they can be added into the system on their own PQB record. For instructions on this action, please see the "Adding a Secondary Event to a Dependent's Record" section below.

- Waiver of Continuing Coverage – Select this action if a waiver of coverage was received from this PQB.
 1. After clicking this link, enter the Waiver Receipt Date.



The date entered is the effective date that this PQB affirmatively waived his/her opportunity to enroll in continuation coverage. This affirmative waiver is revocable in certain situations and as a result, the system will not act on this waiver until the end of the enrollment period. At such time, the PQB will be terminated by the system due to "non-commencement."

2. Click "Save."

- Refund Balance - This action is available for the PQB if the PQB has a positive Current Account Balance, which can be viewed in the PQB's "Premiums" tab.



For instance, a User could provide a refund to a PQB who has a positive Current Account Balance if that PQB overpaid their premium amount that month.

1. Click the "Refund Balance" action. If this action is not available in the PQB's "Actions" tab, the PQB does not have a positive Current Account Balance (and is therefore not owed a refund).
2. You may either refund the full balance to the PQB, or you may refund an amount of your choosing.
 - o Select "Yes" to refund the full balance amount listed.
 - o Select "No" if you do not want to refund the full balance amount listed. A field will appear that will allow you to enter the amount you want to refund to the PQB.
3. Enter the date of the refund (the default setting is the current date).
4. You may check the box to produce a Refund Check for the Participant. Once you have checked the box, a field appears allowing you to enter a Check Number. For more information on the Refund Check template, please refer to the Letters chapter.
5. Click "Save" to refund the PQB.
6. A pop-up window will appear if you chose to generate a Refund Check. Click "Save." The PQB's Ledger will be updated to show the refund as a positive payment, and the Current Account Balance will now reflect the refund. The refund will also be displayed in the PQB's "History."



The "Refund Balance" option will not be available if there is no credit to refund. A negative adjustment is made to the ledger, but a check must still be created.

- Trade Assistance - You can note Trade Assistance Application and/or Approval.
 1. After clicking this link, you will be directed to the "Trade Assistance" screen. You can enter the date the PQB Applied for TAA, and if applicable, the date of Approval for TAA.



If you only enter the date the PQB applied for TAA, the system will generate a "HCTC Eligibility Notice" for this PQB. However, if the date of approval for TAA is provided, then the "HCTC Eligibility Notice" will not be prepared for this PQB.

2. Click "Save" when done.

- [PQB Login](#) - Manually create a PQB user name and password for online access, or edit the PQB's login information.



If the PQB's login information is changed and saved to the system, the system will send an email to this PQB's email address as provided below notifying them of such change.

1. Clicking this link will direct you to the "PQB Login" page. Enter the following information (the User Login will be auto-populated):
 - Password
 - Confirm Password
 - User's Email Address
 - Permission Set - the default setting is "PQB/Participant User default"
 - Select "Yes" if this is an Active User, or select "No" if this is not an active User. If a User is placed in Active status, they will be able to log in to the system.
2. Click "Save" to create the PQB login.



PQB logins can be automatically generated if the "Automated PQB Login" option is activated at the Employer level. A notice with the PQB's user name and temporary password will generate along with the new election package.

Notes

- a. You may enter comments or any other additional information regarding this PQB. For example, you may include a call log, email trails, or instructions for other Users. A date and time stamp is automatically created when a note or appended information is saved. There is a limit of 7000 characters per note.
 - Add a New Note
 1. Click the "Add New Note" button.
 2. Enter the Note information into the box.
 3. Click "Save PQB Note" when done.
 - Append a Note
 1. Click the "Append" link next to the note to which you want to add more information.
 2. Enter the additional information into the box, and click "Save PQB Note."
 3. You may view the appended information by clicking the + sign next to the name of the original note.
 - Delete a Note
 1. Click the "Delete" link next to the note you want to delete.
 2. A pop-up window will appear asking "Are you sure you want to delete this note? Please confirm." Click "Confirm" to delete the note.



You cannot delete appended information from a note. You must delete the entire note to delete appended information.

Adding a Secondary Event to a Dependent's Record

Some qualifying events only apply to certain Participants. For example, a Qualifying Event of "Divorce" under COBRA only extends additional coverage to the spouse and dependent of a PQB, if any. In such a case, the system separates the spouse and dependents from the former employee and establishes the spouse as a new "PQB." This means that when a Dependent experiences a Secondary Qualifying Event, they can be added into the system on their own PQB record.



This action is only available in the "Actions" tab for Dependents that were added to the system with the "Dependent Eligible for Secondary Event" setting set to "Yes" who experience a Secondary Qualifying Event.

1. From the eligible Dependent's "Actions" tab, select "Secondary Event."
2. Select the Participant who is experiencing the Secondary Qualifying Event from the drop-down list, and if there are any other dependents (such as a child), indicate that you would like to include his/her with this second main contact by checking the box next to his/her name.
3. Click "Continue" when done.
4. This Participant is added as you would add a PQB that is completely new to the system, however some of the fields will be pre-populated based on the information entered when he/she was originally added as a Dependent. Review the information and edit any of it if needed. For more information on each step when adding a PQB, please see the "Cobra Participants - [Add New](#)" section near the beginning of this chapter. You will go through the following steps:
 - **Step 1 – PQB**
 1. Review the listed information. Edit if needed.
 2. Click "Continue to Event."
 - **Step 2 - Event**
 1. Select the Qualifying Event Type (required). "Yes" will already be selected, indicating that this is a Secondary Event. If you choose "Loss of Coverage" as the Event Type, you will have the option to edit the reason for loss of coverage.
 2. Enter the Secondary Qualifying Event Date (required).
 3. Enter the day the administrator was notified (required). The default setting is the current date.
 4. Click "Continue to Dependents."
 - **Step 3 – Dependents**
 1. Any applicable existing Dependents will be listed at the top of the screen. To remove these Dependents from this new PQB record, click "Remove" next to his/her name.
 2. You may add a new Dependent to this PQB record.
 3. Click "Continue to Benefits" when done.
 - **Step 4 – Benefits**
 1. Assign the Benefit Plan the same you would if you were adding a new PQB. (Again, please refer to the "Cobra Participants - [Add New](#)" section near the beginning of this chapter.)
 2. Select the Insurance Carrier, Benefit Plan, and Coverage Level/Premium Billing Amount.
 3. Review the Coverage Start information listed. Select "Yes" if the PQB has had 18 months of prior coverage.
 4. Indicate which individuals should be assigned to this Benefit Plan by selecting "Yes" next to his/her name.
 - When done, you may either click to "Save and Add Another Plan," or click "Done - Save PQB."

Assign a PQB to a Department

1. From the Participants section of the sidebar, select the "Cobra Participants - View/Edit" link.
2. Select the last name or the "View/Edit" link of the PQB you want to assign to a department.

3. From the PQB's "Details" tab, click the first "Edit" button.
4. For "Department," select the department to which you want to assign the PQB from the drop-down list.
5. Once you have selected the department, click "Save."



Please refer to the "Employers" chapter for instructions on creating a Department.

PQB Login Information

PQBs can be given different login capabilities. For example, PQBs may be allowed to log in to WebCOBRA and view their information, including contact information, qualifying event information, and payment ledger. PQBs may also be allowed to make payments online and enroll in COBRA by making a full electronic first payment. Please contact BBP Admin to discuss Participant User access levels.

Upon logging in to WebCOBRA, PQB logins will see a screen similar to this:

The screenshot shows the WebCOBRA user interface for a PQB login. The header includes the WebCOBRA logo, the tagline "ADMINISTER COBRA YOUR WAY", a "Logout" link, and a "2.0" version indicator. The user is identified as "Welcome KJones!" with a "Log Out" link. The employer is listed as "Example Employer".

The main content area displays the user's profile for "Jones, KatePQB" (PQB & Dependents). It includes a navigation menu with tabs for "Details", "Contact", "Event", "Premiums", and "History". The "Details" tab is active, showing the following information:

Current Status:	Enrolled	Qualifying Event Date:	03/09/2012	Paid Through Date:	04/01/2012
SSN:	555-55-6666	First Day after Loss of Coverage:	03/10/2012	Current Balance:	\$0.00
PQB ID:		Enrollment Period End Date:	05/16/2012	Typical Monthly Premium:	\$102.00

The "PQB Detail" section includes:

PQB Relationship:	Former Employee	PQB ID:	
Department Name:	Department A	SSN:	555-55-6666
Event Date:	3/9/2012	Date of Birth:	8/9/1976
First Day After Loss of Coverage:	3/10/2012	Scheduled Continuation End:	9/9/2013
Employee ID		Suffix:	
Gender:	Female	Title:	None
Hire Date:		Annual Salary (Required for Life Insurance, AD&D and Disability):	

The "Dependent Detail" section is currently empty.

The "Payment Detail" section includes:

Typical Monthly Premium:	\$102.00	Next Premium Due:	\$102.00
Account Balance:	\$0.00	Last Payment Received:	03/21/2012
First Possible termination:	05/06/2012		

The "Setting Detail" section includes:

Medicaid Participant:	No	Receive Letter Copies:	Yes
On Hold:	No	Print 'And Dependents':	No
Receive Emails:	No	Experienced Event:	Yes
On SS Disability:	No	Include in Address:	Yes
Correspondence Language:	English	Billing Contact:	Yes

The footer contains the copyright notice: "Copyright © 2005-2012 Travis Software Corp. All Rights Reserved." and a logo.

Details

This tab lists information about the Participant. This information can be reviewed by the PQB but not edited. Only user-defined fields, set by the Administrator, can be edited by the PQB, if the option is set to allow it.

Contact

Here PQBs can view their contact information, including Address, Phone number, and Email. Again, this information may be viewed but not edited by the PQB.

Event

Listed in this tab is the PQB's qualifying event description, event date, and the date the administrator was notified.

Premiums

From this tab, if certain Employer options are enabled, PQBs can enroll in automatic ACH drafts, make Electronic Check and credit card payments, and view their ledger. The Last Payment Received, First Possible Termination Date, and Current Account Balance are listed. The PQB simply enters the payment amount (to which the Convenience Fee will be added), fills out any additional information (if applicable), and clicks the "Enter Payment" button.

- The PQB Account Ledger displays payments and invoices that have been received/entered for them. If no payments or invoices have been entered, this will be stated here, along with the PQB's current status, for example - "Enrolled Pending Payment."

History

Here PQBs can view reports on their information, and upload files to their record.

Chapter 5: Retirees/Direct Bill Participants

This chapter explains management and processes for Retiree/Direct Bill Participants. Retirees are handled similarly to PQBs. They have a "Retiree Detail" screen, and you can perform many of the same actions (if applicable) for a Retiree as a PQB. You will notice throughout the WebCOBRA service, and in this chapter correspondingly, that Retirees may be referred to as PQBs and Participants.

Retirees/Direct Bill – Add New


1. From the Participants section of the sidebar, select "Retirees/Direct Bill," and then click "Add New." You may also add a new Retiree/Direct Bill Participant from the Retiree/Direct Bill listing by clicking the "Retirees/Direct Bill - View/Edit" link and then the "Add New Participant" button.
2. You will be directed to the "Retiree/Direct Bill - Add New" page.
3. **Complete Step 1 - Retiree/Direct Bill:**
 1. Add New Participant
 - Select a Department to which you want to add the Participant (if applicable).
 - Enter the Participant's Coverage Start Date.
 - Select the Billing Cycle. Choose from: Monthly (default), Quarterly, Semi-Annually, Annually
 - If this Participant is an existing Employee in WebCOBRA, you may transfer his/her existing Active Employee data to a Retiree/Direct Bill Participant record. For more instructions on transferring an Active Employee to a Retiree/Direct Bill Participant, please see the "Transfer Active Employee to Retiree/Direct Bill Participant" section later in this chapter.
 - b. Retiree Information
 - First, Middle Initial, Last Name (required)
 - Date of Birth (MM/DD/YYYY) (required)
 - Participant ID
 - Social Security Number
 - Employee ID
 - Gender
 - Title - If the Title is set to "None," only the Participant's last name will appear after the greeting in letters. For example, "Dear Smith."
 - Annual Salary (required for Life Insurance, AD&D, and Disability)
 - Years of Service
 - Original Hire Date
 - c. Contact Information
 - Address Line 1 (required)
 - Address Line 2
 - City (required)
 - State/Province
 - Zip/Postal Code (required)
 - Country
 - Phone Number
 - Email Available Letters (Yes or No)
 - Email Address (required if Correspondence is going to be sent electronically to this Participant)

- d. Retroactive Information (Not Required) - This section is to be completed if you are taking over the administration of benefits for a Participant. Click the arrow below this section header to expand the section and enter applicable information.
 - Participant Enrolled & Paid Through Date
 - Eligibility Notice Mailed Date
 - Enrollment Form Received Date
 - Incomplete Enrollment Form Received Date
 - Print a Takeover Letter (Yes or No)
 - e. Additional Actions
 - Enroll with 100% Subsidy (Yes or No)
 - Print a Premium Coupon Set (Yes or No)
 - Print "And Dependents" (Yes or No)
4. When you are done entering this information, you may click the "Continue to Dependents" button to begin entering Dependent information, or if you would like to stop here, click "Done - Save Retiree/ Direct Bill."
5. **Complete Step 2 - Dependents.** You may skip this step and move on to **Step 3 - Benefits** if there are no Dependents for this Participant or if you do not want to add any Dependents to this Participant at this time. You will have the opportunity to add another Dependent if you choose. You may also add Dependents after adding the Participant.
- a. Dependent Information - Once you add a new Dependent's information, that Dependent will be listed here. If you need to remove a dependent during the Retiree/Direct Bill Participant Add process, there will be a "Remove Dependent" link listed next to each entered Dependent.
 - b. Add New Dependent
 - First, Middle Initial, Last Name (required)
 - Date of Birth (required)
 - Relationship to the Participant - Choose from:
 - Not Specified
 - Spouse
 - Son
 - Daughter
 - Dependent (This is the default setting)
 - Deceased
 - Domestic Partner
 - Former Employee
 - Child
 - Domestic Partner's Child
 - ID Number
 - SSN
 - Gender
 - Email Address (Required if Correspondence is going to be sent electronically to this Dependent)
 - Receive Own Copy of Correspondence (Yes or No) - The default setting is "No."
 - Use POB Address (Yes or No) - The default setting is "Yes." If you select "No," an expanded area will appear to allow you to enter the dependent's address.
 - c. When done, you can either click "Save and Add Another Dependent" if you would like to add an additional dependent, or click "Continue to Benefits."
6. **Complete Step 3 - Benefits:**

- a. Benefit Assignment - Once you assign a Benefit Plan to the Participant, that Benefit Plan assignment will be listed here. You will have the opportunity to add another Benefit Plan assignment if you choose. If you need to remove a Benefit Plan assignment during the Retiree/Direct Bill Participant Add process, there will be a "Remove Plan" link listed next to each assigned Benefit Plan.
 - b. Benefit Plan Selection
 - Insurance Carrier (required)
 - Benefit Plan (required) - The choices you have are based on which Benefit Plans are assigned to the Carrier selected above.
 - Coverage Level (required) - These choices are based on which Benefit Plan you selected.
 - For example, if the Benefit Plan you selected has a Tier Based costing method, you will select one of the coverage level tiers. If you the Benefit Plan you selected has a "Determined Per Participant" costing method (Flat fee), you will specify the participant's monthly premium amount. The administrative fee will be added to this amount.
 - c. Coverage Start Information
 - Continuation Coverage Period - There will not be a continuation coverage period set for Retiree/Direct Bill participants.
 - Continuation Coverage Eligibility Date (required) - Enter the date the Participant will begin coverage for this benefit. It must be later than this plan's last assignment end date.
 - Premium Billing Start Date (required) - Enter the date the Participant will start to pay premiums for this plan. Typically this will be the same as the First Day After Loss of Coverage, but does not have to be.
 - Waiting Period Before Coverage Began (select a time period from the drop-down list), or choose to enter manually and enter an exact number of Waiting Period Days
 - d. Individual Assignment Information
 - This section lists the Participants you are adding to the system that could be assigned to the Benefit Plan, including the Participant and any Dependents added. You must assign at least one Participant to the Benefit Plan to save it.
 - Select "Yes" next to the Participants you want to assign to the Benefit Plan.
 - You may then select to "Save and Add Another Plan."
7. When you are done, click the "Done - Save Retiree/Direct Bill" button to finish.
 8. A pop-up window will appear stating, "New Retiree/Direct Bill Record Successfully Added." Suggested next steps include:
 - View Retiree/Direct Bill Record
 - Add Another Retiree/Direct Bill for This Employer
 - Return to Retiree/Direct Bill Listing
 - Return to the Home Page

Transfer Active Employee to Retiree/Direct Bill Participant

1. From the Participants section of the sidebar, select the "Retirees/Direct Bill - Add New" link. You may also add a new Retiree/Direct Bill Participant from the Retirees/Direct Bill listing by clicking the "Retirees/Direct Bill - View/Edit" link and then the "Add New Participant" button.
2. You will be directed to the "Retirees/Direct Bill - Add New" page.
3. **Complete Step 1 - Retiree/Direct Bill:**

- a. Add New Participant
 - Select a Department to which you want to add the new Participant (if applicable).
 - Enter the Coverage Start Date (required).
 - Click the "Transfer Active Employee to Retiree/Direct Bill Participant" button.
 4. A pop-up window will appear where you can enter and search for the Employee's name for which you want to create a Retiree/Direct Bill Participant record. Enter the Employee's first or last name and click "Search."
 5. Select the Employee's name from the list that appears and then click "Review Selection."
 6. General information about the Employee will appear. Review this information to be sure this is the Employee you want to transfer and click "Continue."
 7. You will be directed back to the "Retirees/Direct Bill - Add New" screen. Some fields will be pre-populated with information from the Employee record. The steps for transferring this Employee to a Retirees/Direct Bill Participant are the same as adding a new Retirees/Direct Bill Participant to the system, as described in the "Add a New Retiree/Direct Bill Participant" section above.
-  Be sure to review (and edit if needed) all of the fields and pre-populated information to be sure they are correct before adding this Retiree/Direct Bill Participant.
8. When you are done, click the "Done - Save Retiree/Direct Bill" button to finish.
 9. A pop-up window will appear stating, "New Participant record successfully saved." Suggested next steps include:
 - View Retiree/Direct Bill Record
 - Add Another Retiree/Direct Bill for This Employer
 - Return to Retiree/Direct Bill Listing
 - Return to the Home Page

Retirees/Direct Bill – View/Edit

View Retiree/Direct Bill Participant Listing

From this link you will be directed to the Participant listing, which displays every Retiree/Direct Bill Participant and any Dependents to which you have access. The Participant Name, Type (Retiree and Dependent), Participant ID or SSN, and Status are shown for each record. Click on one of the underlined headings to sort the listing by that heading type.

1. From the Participants section of the sidebar, select "Retiree/Direct Bill," and then click the "View/Edit" link.
2. You will be taken to the listing of all Retiree/Direct Bill Participants and Dependents. From this screen you can:
 - Sort the listing by choosing whether to identify Participants by Participant ID or SSN, and/or selecting certain statuses by which to filter the Participants
 - Add a New Participant
 - Transfer an Active Employee to a Retiree/Direct Bill Participant
 - View or edit individual Participant records

The following describes each of these features and includes steps on how to execute them.

Add a New Retiree/Direct Bill Participant

Refer to the instructions mentioned above under the "Add a New Retiree/Direct Bill Participant" section in the "Retirees/Direct Bill – Add New" link. You can go directly to this page from either the "Retirees/Direct Bill - Add New" link in the sidebar, or go to the "Retirees/Direct Bill - View/Edit" link from the Participants section of the sidebar and click the "Add New Participant" button from the Participant listing screen.

Transfer Active Employee to Retiree/Direct Bill Participant

Please refer to the instructions mentioned earlier in this chapter under the "Transfer Active Employee to Retirees/Direct Bill Participant" heading of the "Retirees/Direct Bill - Add New" section.

Edit an Existing Retiree/Direct Bill Participant

1. From the Participants section of the sidebar, select "Retirees/Direct Bill," and then click the "View/Edit" link. You will be directed to the Participant listing.
2. Select the Participant or Dependent you would like to edit by clicking either their last name or the View/Edit link next to the Participant's or Dependent's record. You will be directed to their individual "Retiree/Direct Bill Details" tab.

3. The tabs listed on this page contain all of the Participant's or Dependent's information. Select the appropriate tab for the information you want to view or edit for this Participant or Dependent:

- Details
- Contact
- Benefits
- Premiums
- History
- Actions
- Notes



Some sections contain general descriptions as well as i-bubble help descriptions. If, after reading the descriptions listed you need further explanation, please click the blue i-bubble help description icon for more information. Click "Close" to close the description box.

Details

This tab lists basic details and contact information for the Participant. Also listed is Enrollment and Dependent information. To edit any of this information, click the "Edit" button below that section. When done making changes, click "Save."

- Participant Detail - This section includes the Participant Relationship, Department, Employee ID, Gender, Hire Date, Billing Cycle, Participant ID, SSN, Date of Birth, Suffix, Title, and Annual Salary.
- Enrollment Detail - Minimum Amount Due to Enroll details can be found here. This section cannot be edited.
- Dependent Detail - Here you will find all the Dependents associated with this Participant. You can click on the Dependent's name to go to his/her individual record. You may also add a dependent from this section by clicking the "Add Dependent" button. For more information on adding additional dependents to a Participant, please see the "Add Additional Dependents to a Participant Record" section below.
- Setting Detail - Settings listed include the ability to indicate whether the Participant:
 - Medicaid Participant - If the Participant is on Medicaid, select "Yes" for the "Medicaid Participant" setting. This is for record keeping only.
 - On Hold - The On Hold setting is used to prevent a Participant from being automatically terminated via Automatic Processing, regardless of the reason for termination. You can either enter a date that the Participant will be On Hold until or simply select the "Yes" option for this setting.
 - Receive Emails - If the Participant can receive emails, select "Yes" for the "Receive Email" setting. The email address for the Participant can be entered during the Participant Add process, or it can be entered once the record is added, under the "Contact" tab. The "Enable Emailing of Letters" Employer Option must be activated.
 - On SS Disability - If the Participant is eligible for the Social Security Disability extension of an additional 11 months of COBRA coverage, select "Yes" for the "SS Disability" setting. Once activated, the Social Security Disability extension will become effective after the 18 months of federal COBRA period has been exhausted.
 - Correspondence Language - Choose either English or English and Spanish.
 - Receive Letter Copies - If this is a Dependent record, select "Yes" if the Dependent should receive his/her own copies of letters.
 - Print "And Dependents" - If this is the main Participant and the Participant has Dependents, select "Yes" if you would like the wording "And Dependents" to appear after the Participant's name on his/her letters.

- Experienced Event - This denotes whether the Participant experienced the event. For the primary Participant, this setting will be set to "Yes." For Dependents of the Participant, this setting will be set to "No," unless they have experienced a qualifying secondary event. This option cannot be edited.
- Include in Address - This will be set to "Yes" if a Dependent's address is the same as the Participant's.
- Billing Contact

Contact

Contact information for the Participant and any dependents is listed here. This includes Address, Phone number, and Email address.

- a. Participant Contact Information - To edit any of this information, click the "Edit" button below that section. When done making changes, click "Save."
- b. Dependent Information (If applicable) - To view the Dependent's contact information, you may click the Dependent's name to go to his/her individual "Contact" tab.

Benefits

- a. Benefit Assignment Information
 - From this tab, you can view existing Benefit Plan assignments.
 - Each Benefit Plan to which the Participant is assigned is listed in this table. Information listed includes Carrier, Benefit Plan Name, Coverage Leave, Monthly Premium Amount, Billing Start Date, End Date, and Admin Fee (if any).
 - To view a Benefit Plan assignment's details for this specific Participant, click the "View" link next to the Benefit Plan. Details for this Plan will be listed.

Premiums

The Participant's "Premiums" tab contains basic enrollment and payment information for the Participant, the Participant's Ledger.

- a. Basic enrollment and payment information - Includes the last payment received date and current account balance.
- b. Participant Ledger View - The Participant's ledger can be found here that includes details such as the payment date, type, description, charges/payment amount, account balance, and if the amount should not be disbursed.



[Subsidies will appear on the ledger as individual entries.](#)

History

- a. Participant History
 - Reports - The reports listed will generate the information for the individual Participant. These reports can also be accessed at the Employer Level from the "Predefined Reports" link in the Reporting section of the sidebar.
 - History - The following events listed are automatically logged in this History section. Previously generated correspondence PDFs may be viewed by clicking the "View" link.
 - Initial Participant entry, date the eligibility notice was printed, and the date the enrollment form was received.

- Participant benefit drops and benefit assignments.
 - Global benefit drops and rate changes.
 - Eligibility coverage change.
 - Address change. The address before and after the change is displayed.
 - Participant terminations and reinstatements.
 - Subsidies.
 - Refunds and Refund Checks.
 - Activation of Social Security Disability extension and Medicaid.
 - PDF copies of letters accepted are stored.
- **File Upload** - You may upload documents for the individual Participant, such as signed forms sent to you by the Participant.
 - Upload Files:
 1. From the "File Upload" sub-section of the Participant's "History" tab, click "Browse."
 2. Locate and select the file you want to upload to the Participant's History, and click "Open."



Files can be no larger than 4MB. If you have a larger file, please contact the Travis Support Team. Large files will take a very long time to upload. Uploading files affects your storage amounts.

3. You may further specify the document by adding a description for the file in the "File Description" box.
 4. Click "Upload File."
 5. A message will appear confirming the file was uploaded successfully.
- View Uploaded Files:
 1. From the "File Upload" sub-section of the Participant's "History" tab, click the "View" link next to the file you want to view.



In order to view uploaded files, you will need to make sure your Security Settings in your browser allow automatic prompting for file downloads. To enable this in Internet Explorer:

1. From the top menu bar in Internet Explorer, click "Tools" and then select "Internet Options."
2. Select the "Security" tab. Click the "Internet" icon, and then click the "Custom Level" button.
3. Scroll down to the "Downloads" section in this dialog box. Select the "Enable" radio button under the heading "Automatic prompting for file downloads."
4. Click "OK" at the bottom to close this dialog box. Click "OK" again to close the "Internet Options" dialog box.

If the User has set "webcobra.com" as a trusted site, then follow the above steps, except click on the "Trusted Site" icon instead of the "Internet" icon in step 2.

Actions

- a. Record Actions - the following options can be performed from this tab:
 - **Add Dependent** - You can add additional dependents for this Participant that were not included in the original Participant Add process. This can be done either from the

Participant's "Actions" tab or by clicking the "Add Dependent" button on the PQB's "Details" tab.

1. After clicking this action, the "Dependent Add" screen will appear. Enter the Dependent's information, including Name, Date of Birth, and other personal information. Also you will be asked to indicate if this Dependent should receive their own copies of correspondence.
 2. You will then fill out the Dependent's Benefit Plan Assignment information. Some of the information will be auto-populated based on the main Participant's existing information.
 3. When done, click "Save Participant" to add the Dependent.
- **Enrollment Form** - This action is only available in the "Actions" tab for Participants and Dependents whose status is "Notified, Awaiting Response." Once the Enrollment Form is received, click this Action. Enter the Enrollment Form Received Date (required), and the Enrollment Form Signed Date and Postmark Date. Check the box if the Enrollment Form is incomplete, and enter any notes of the incomplete form into the blank field. Click "Save" when done.
 - **Participant Login** - Manually create a Participant user name and password for online access, or edit the Participant's login information.



If the Participant's login information is changed and saved to the system, the system will send an email to this Participant's email address as provided below notifying them of such change.

1. Clicking this link will direct you to the "Participant Login" page. Enter the following information (the User Login will be auto-populated):
 - o Current Password
 - o New Password
 - o Confirm New Password
 - o Security Question
 - o Security Answer
 - o User's Email Address
 - o Permission Set - the default setting is "PQB/Participant User default"
 - o Select "Yes" if this is an Active User, or select "No" if this is not an active User. If a User is placed in Active status, they will be able to log in to the system.
2. Click "Save" to create the Participant login.



Participant logins can be automatically generated if the "Automated PQB Login" option is activated at the Employer level. A notice with the Participant's username and temporary password will generate along with the new Election packet.

Notes

- a. You may enter comments or any other additional information regarding this Participant. For example, you may include a call log, email trails, or instructions for other Users. A date and time stamp is automatically created when a note or appended information is saved. There is a limit of 7000 characters per note.
 - Add a New Note
 1. Click the "Add New Note" button.
 2. Enter the Note information into the box.
 3. Click "Save Participant Note" when done.
 - Append a Note
 1. Click the "Append" link next to the note to which you want to add more information.
 2. Enter the additional information into the box, and click "Save Participant Note."

3. You may view the appended information by clicking the + sign next to the name of the original note.
- Delete a Note
 1. Click the "Delete" link next to the note you want to delete.
 2. A pop-up window will appear asking "Are you sure you want to delete this note? Please confirm." Click "Confirm" to delete the note.



You cannot delete appended information from a note. You must delete the entire note to delete appended information.

Chapter 6: Premiums

As an Employer User, you may look up individual premium payments that have been made.

Search for and View Individual Payments

1. From the Premiums section of the sidebar, select "Individual Payments." Enter the search criteria to look up a PQB in the Search box. Click the "Search" button. Select the PQB from the search results. You will be taken to the "Premiums" tab of the "PQB Detail" screen.
2. From here, you can view the last payment received, first possible termination date, current account balance, and premiums and payments in the Participant's ledger.

Chapter 7: Reporting

The Reports section in WebCOBRA will allow you to view and run existing reports, view emailed reports, view correspondence history, and create Ad-Hoc reports.

Definitions:

- **Ad-Hoc Reporting:** Gives you the ability to create your own reports. You can choose which fields you want to show, in what order, and you can drill down the data you're looking for with built-in filters.

Pre-Defined Reports in WebCOBRA

Under this selection you will see a listing that shows every pre-formatted report to which you have access. These reports are organized by the type of information each report entails.

From this screen you can:

- Run Reports
- Create Emailed Reports Subscriptions
- View/Delete Report Subscriptions
- Create Ad Hoc Reports

Run Pre-Defined Reports

1. From the Reporting section of the sidebar, select "Pre-defined Reports."
2. Select the report you wish to run from the Pre-formatted Reports screen. Pre-defined reports in the system include:

- **PQB Reports**
 - PQB Detail
 - PQB Termination
 - PQB Enrolled Premiums Listing
 - PQB Payment
 - PQB Status History
 - PQB Termination by System Date
 - Young Adults Potentially Affected by PPACA
 - PQB New Listing
 - PQBs On Hold
 - PQB Balance
 - PQB Family
 - PQB Address Change
 - PQB Social Security Disability

- PQB Age Selection
- PQB Trade Assistance Listing

- **Benefit Plan Reports**
 - Benefit Plan Listing
 - Benefit Plan Information
 - Sponsor
 - Benefit Single Tables

- **PQB Status Reports**
 - PQB Enrolled
 - PQB Notified
 - PQB Payment

- **Premium Reports**
 - Premium Receipt
 - Premium Reconciliation
 - Reconciliation by Payments (Voucher Report)
 - Reconciliation by Plan
 - Reconciliation by Disbursement
 - Electronic Payments
 - Premium Reduction Summary
 - Premium Reduction Summary by Payments
 - ARRA Audit
 - Premium Receipt with Payment
 - ARRA IRS
 - ARRA Eligible Reduced Hours
 - Disbursements Including Non-Cash Payments
 - Unapplied Premium
 - Administrative Fee Collected and Credited
 - Premium End Balance with Terminated PQBs

- **Employer Reports**
 - Certificate of Mailing
 - Active PQB Listing
 - Election Notices
 - Notes
 - Employee Listing
 - COBRA General Notice
 - Departments
 - Employer Listing
 - Letter Production
 - Certificate of Mailing Plus
 - Notifications Plus 2 Report
 - Employer Labels 1 1/3 x 4 by 2
 - Employer Labels 1 x 2 5/8 by 3

- **Retiree Reports**
 - Retiree Status
 - Retiree Termination

3. Enter the parameters for the report you are going to run.
4. Select the "View Report" button.

Detailed descriptions of each pre-defined report can be found in the "Pre-Defined Reports" section later in this chapter.

Once you create and view a report, you can also export it in several different formats. To do so, click on the drop-down menu given and select a format.

Report Subscriptions

You may setup reports to be automatically generated on a schedule of your choosing. The recipient will be notified via email when the report is prepared and ready to be viewed. They can then log into WebCOBRA to view the report.

To Setup a Report Subscription:

1. From the Reporting section of the sidebar, select "Pre-defined Reports."
2. Select the report you wish to email.
3. Select the "Email Report" link from the upper right-hand corner.
4. Choose the file format in which to send the report.
5. Select your Employer.
6. Select PQB status you want to display. To select more than one, hold down the "Ctrl" key as you click them.
7. Select the PQB Identifier.
8. Select whether to Group by Department.
9. Select when the report should be run and the recipient should be notified. Options include:
 - Right now, only once
 - Every weekday morning (6am CST)
 - Every weekday evening (8pm CST)
 - Every Monday morning (6am CST)
 - First Monday of Every Month (6am CST)
 - Or, you can pick a specific day of the month. If you choose the "Pick a Day of Month" option, you will need to enter the specific day of the month to send the report.
10. Enter the Email Recipient's email address.
11. Click the "Email this Report" button.
12. Enter the parameters for the report and click the "Email this Report" button.

13. A green confirmation message will appear at the top of the screen stating, "Report Subscription saved successfully."

To View Reports Subscriptions:

You may view report subscriptions that are currently set up by selecting "Pre-Defined Reports" from the Reporting section of the sidebar, and choose the "Report Subscriptions" tab.

Here you will find a listing of all report subscriptions, including which the report name, email recipient, who created the subscription and when it was created, as well as when the report subscription is scheduled to run.

Report Subscriptions Processed

To View Processed Report Subscriptions:

You may view what reports that have been generated with a report subscription by selecting "Pre-Defined Reports" from the Reporting section of the sidebar, and choose the "Report Subscriptions Processed" tab.

On this screen, you will find a listing of all report subscriptions, including which the report name, the date the report was generated, and the email recipient.

Ad Hoc Reports

The Ad Hoc reporting capability in WebCOBRA allows you to create custom reports with parameters of your choosing.

Create New Report with Ad Hoc Reporting

1. From the Reporting section of the home screen, select the "Pre-defined Reports" link.
2. Select the "Ad Hoc" tab.
3. Select the "Create New Report" button.
4. Enter a name for the report (required) and a description (optional).
5. Check the box for fields you want included in your report. Choose from information about POBs, Benefit Assignments, Event Information, and Payments.
6. Optional - You can add your own filtering parameters in order to drill-down the data on your report: Choose a Field, Optional Filter Type, Text For Filter, and click "Add."
7. When done, select to "Save and Run Report."
8. Review the data that the report has pulled. If the report includes the correct data, select "Save Report."

Pre-Defined Reports Descriptions

The following sections describe each report available in WebCOBRA. Included are the title and purpose of the report, what data is reported, and a detailed description.

Primary Qualified Beneficiary (PQB) Reports

PQB DETAIL

Purpose of Report: Overview of the PQB record, displaying one Participant and their Dependents per page.

Data Reported: This report provides a current overview of each PQB record that fits within the parameters specified. This information is formatted with one page per Participant (and Dependents) reported.

Detailed Description:

- **Termination and Reinstatement dates** are entered only when applicable.
- **Expected Paid Through date** is based on current premiums and payments received.
- **Benefit Information** lists all currently active (as of date report was run) assigned benefit plans. This section of the report will only reflect benefits for which the "Assignment Start Date" is equal or prior to the current date. Plan Assignments that become effective on a future date will not be listed. A PQB whose Loss of Coverage, and therefore coverage effective date, occurs in the future, will have no benefits listed in this section.
- The report may be run based on PQB Status. Using this criteria, you may narrow the results to show only PQBs in the specified status.
- Using the PQB Identifier selection, you may alter the identifying value to use "SSN" or "Participant ID." Each of these values is pulled from corresponding value used when entering the PQB record.
- Select "Yes" to Group by Department if you would like the report results to be further sorted by department assignment.

PQB TERMINATION

Purpose of Report: This report shows all PQBs for whom a termination became effective within the date range specified.

Data Reported: A listing of PQBs separated by termination type, displaying termination and benefit assignment information. A count of PQBs reported will be displayed at the end of each report sub-heading (Department, etc.).

Detailed Description:

- The report may be run based on:
 - a. Date Parameters
 - i. *Terminated On or After* – PQBs for whom the termination effective date falls on or after the date specified.
 - ii. *Terminated On or Before* – PQBs for whom the termination effective date falls on or before the date specified.

Using these criteria, you may narrow the results to show only PQBs whose records had terminations effective within a specified date range (for example: inclusive, from 01/01/2010 to 04/30/2010).

- Several settings are included that may alter the amount, type, or format of information:
 - a. The identifying value can be altered by using the *PQB Identifier* selection (shown above as "SSN"), to identify PQBs by Social Security Number, PQB ID, or PQB Group ID.
 - b. Option to *Show PQB Address* or omit that information from results.
 - c. Option to *Show Benefit Details* or omit that information from results.
 - d. *Include Manually Terminated PQBs* may be set to "Yes" if you wish to include PQBs whose records were manually terminated by the administrator (through the "Actions" tab of the PQB record).
 - e. *Include Denial of Coverage PQBs* may be set to "Yes" if you wish to include PQBs who have been entered into WebCOBRA as a "Denial of Coverage."
 - f. Select "Yes" to *Group by Department* if you would like your report results to be further sorted by department assignment.
 - g. *Show latest termination per PQB only* option is used to ensure that a record, which may have been terminated, then reinstated, only to be re-terminated some time later, will not show multiple times on the report. By setting this option to "Yes," the report will only display a PQB record based on the latest effective termination date listed on the record.
 - h. *Show Inactive Plans* option is set to "Yes" if you wish to display benefit plans that are no longer active.
 - i. *Include Enrolled PQBs who have been reinstated* option is set to "Yes" if you would like to include PQBs who were termed at one time but have since been reinstated.

- Functions to note in this report:
 - a. The **Term Date** shown reflects the termination effective date, not the date it was processed. For a report displaying the termination by processed date, please see the "PQB Termination by System Date" report.
 - b. The "PQB Termination" notation may be found in the individual PQB record "History" tab.

Note that the "effective" date (second column from the left) from the PQB "History" tab is reflected on the report. As mentioned above, a PQB may have, in their lifetime, been terminated and reinstated one or more times, resulting in several notations of this type in history. If you would like to see only the most recent termination of a PQB record on this report, it is suggested to utilize the option Show latest termination per PQB only.
 - c. This report will show any termination that was made on a PQB record - appearance on this report only states that a PQB has been, at one point, terminated with an effective date within the date parameters. This does not always mean that the current PQB account status is "Terminated," as the PQB may have been reinstated since the reflected termination was processed.

PQB ENROLLED PREMIUMS LISTING

Purpose of Report: Displays a listing of all PQBs who enrolled by paying their first month's premium within the time parameters specified.

Data Reported: A single listing is shown for all PQBs who fall within the report parameters.

Detailed Description:

- The **Premiums** amount shown is the PQB's monthly premium.
- The end of each report section will reflect a total of PQBs listed.
- The report may be run based on Date Parameters:
 - i. *Enrolled On or After* – The report will pick up PQB records whose enrollment in COBRA was made effective on or after the date specified.
 - ii. *Enrolled On or Before* – The report will pick up PQB records whose enrollment in COBRA was made effective on or before the date specified.

Using these criteria, you may narrow the results to show only PQBs who enrolled effectively by making their first COBRA payment within a specified date range.

Using the PQB Identifier selection, you may alter the identifying value (shown in the example above as the "SSN" column), to use "Social Security Number" or "Participant ID." Each of these values is pulled from corresponding value used when entering the PQB record.

- Functions to note in this report:
 - a. The **Enrolled Date** shown is the "Check Date" entered, relating to the first month's (enrolling) premium payment. If the PQB was enrolled retroactively (no specific first payment data entered), this date may default to the event date.
 - b. The "Enrolled" notation may be found in the individual PQB record "History" tab.

Note that the "effective" date (far left column) from the PQB "History" tab is that which is reflected on the report. In the case of a PQB who has been retroactively enrolled, or for another reason did not have enrolling payment detail entered, this effective date may default to the event date, therefore causing this PQB to appear on the "PQB Enrolled Premiums Listing" report based on their event date.

PQB PAYMENT

Purpose of Report: Reflects all payments received and entered per PQB record, within the date parameters specified, and the current attribution of these payments.

Data Reported: A listing, with one PQB per page, of all payments received in relation to that PQB record within the date parameters specified. Also shown are the check number (if applicable) and whether the payment was voided or not.

Detailed Description:

- In the Account Payment History section, Payment Information includes **Payment Entry Date**, **Payment type** (shown in example as "Check"), and **Payment Amount**.
- **Premium Application** includes Premium month, Benefit plan (Plan Code – Coverage level), Premium Amount due, and amount applied from this payment to the corresponding premium.
- Payments will be shown as they are attributed to the appropriate monthly premium amounts due. At the bottom of each page, a total of "Payments Received," "Payments Applied," and "Total Refunds" will be shown.
- A page will also be generated showing the "Grand Total" breakdown on the final page of the report.
- The report may be run based on:
 - a. Date Parameters
 - i. Payment Date On or After – The report will pick up payments entered on or after the date specified.
 - ii. Payment Date On or Before – The report will pick up payments entered on or before the date specified.
 - b. PQB Status – From this drop-down menu, you may include PQBs of "All," several, or a single Status (Terminated, Enrolled, Added Not Notified, etc.) in your report results.
 - c. Include Non Cash Payments – When entering a payment to a PQB record, you have the option to make that payment "non-cash." With this parameter, you may choose to either include (Yes) or exclude (No) payments entered in that manner.

Using these criteria, you may narrow the results to show only payments made by PQBs within a specified date range on records which are currently in a particular status, not including those payments entered as "Non-Cash."

- Using the PQB Identifier selection, you may alter the identifying to use "SSN" or "Participant ID." Each of these values is pulled from corresponding value used when entering the PQB record.
- In regards to the "Totals" shown at the end of each section:
 - a. **Total payments received** should reflect the total sum of payments reflected in the detail lines of the report, related to the appropriate section (PQB or grand total).

- b. **Total Payments applied** will amount to the total sum of payment amounts that have been both received and applied to premium. A payment is only applied to premium if it is sufficient to satisfy that full premium. Therefore, some payment amount may be stored in a PQB balance, and not reflected in this total.
- c. **Total Refunds** will reflect the total amount of payment refunded to the PQB for any reason, such as payment past the benefit end date.

PQB STATUS HISTORY

Purpose of Report: Shows which status a PQB record was in, within a particular set of date parameters. This does not show the specific date that a PQB entered that particular status, only whether or not the PQB record was in that status within the date parameters specified.

Data Reported: A listing, separated first by PQB Status, then by Department, of all PQBs whose record existed (even if only for a few moments) within that status within the date parameters specified.

Detailed Description:

- A "Totals" block will be shown, listing a count of records reflected under each status. The listing consists of records identified by **Name** and **PQB identifier**.
- The report may be run based on:
 - a. Date Parameters
 - i. *Status On or After* – The report will list PQBs who were classified within the specified status on or after the date specified.
 - ii. *Status On or Before* – The report will list PQBs who were classified within the specified status on or before the date specified.
 - b. *PQB Status* – From this drop-down menu, you may include PQBs of "All," several, or a single status (Terminated, Enrolled, Added Not Notified, etc.) in your report results.

**Note:* This setting is not related to the current status of the PQB, but the status categories you wish to see on the report.

Using these criteria, you may narrow the results to show only PQBs within a specified date range for records that, within that date range, fell into a particular status.

- Using the *PQB Identifier* selection, you may alter the identifying value (shown in the example above as "SSN"), to use "SSN" or "Participant ID." Each of these values is pulled from corresponding value used when entering the PQB record.
- Function to note in this report:
 - a. If the report is run without date parameters, you are essentially asking the report to show what PQBs existed within which statuses for all time. In this case, a PQB may show on the report in several different statuses, as the PQB record did exist in several different statuses at differing points in time. For example:
 - A PQB is entered on 04/01/2011, and that PQB record immediately goes into the status "Added not notified."
 - That PQB's letters are printed, and his status changes to "Notified, Waiting for Response."
 - On 04/15/2011, a check is received from that PQB, and that PQB Record becomes "Enrolled."
 - On 04/30/2011, that PQB requests that his record be terminated, and the status is changed to "Terminated."

- If the PQB status report is run to show all statuses, from 04/01/2011 to 05/01/2011, this PQB name will be listed under all 4 of the statuses listed in the scenarios above, as the PQB occupied each of those statuses at one point within the date range specified.

PQB TERMINATION BY SYSTEM DATE

Purpose of Report: This report shows all PQBs for whom a termination was processed within the date range specified.

Data Reported: A listing of PQBs separated by termination type, displaying termination and benefit assignment information. A count of PQBs reported will be displayed at the end of each report sub-heading (Department, etc.).

Detailed Description:

- The **Term Date** shown reflects the termination process date, not the date it was effective. For a report displaying the termination by effective date, please see the "PQB Termination" report.
- The **Last Day Covered** column displays the last day the PQB effectively had coverage.
- The report may be run based on Date Parameters:
 - i. *Terminated On or After* – PQBs for whom the termination process date falls on or after the date specified.
 - ii. *Terminated On or Before* – PQBs for whom the termination process date falls on or before the date specified.

Using these criteria, you may narrow the results to show only PQBs whose records had terminations processed within a specified date range.

- Several settings are included that may alter the amount, type, or format of information:
 - a. The identifying value can be altered by using the PQB Identifier selection to identify PQBs by Social Security Number or Participant ID.
 - b. Option to Show PQB Address or omit that information from results.
 - c. Option to Show Benefit Details or omit that information from results.
 - d. Include Manually Terminated PQBs may be set to "Yes" if you wish to include PQBs whose records were manually terminated by the administrator (through the "Actions" tab of the PQB record).
 - e. Include Denial of Coverage PQBs may be set to "Yes" if you wish to include PQBs who have been entered into WebCOBRA as a "Denial of Coverage."
 - f. Select "Yes" to Group by Department if you would like your report results to be further sorted by department assignment.
 - g. Show Latest Termination per PQB Only option is used to ensure that a record, which may have been terminated, then reinstated, only to be re-terminated some time later, will not show multiple times on the report. By setting this option to "Yes," the report will only display a PQB record based on the latest termination processed on the record.
- Functions to note in this report:
 - a. The "PQB Termination" notation may be found in the individual PQB record "History" tab.

Note that the "processed" date (far right column) from the PQB "History" tab is reflected on the report. As mentioned above, a PQB may have, in their lifetime, been terminated and reinstated one or more times, resulting in several notations of this type in history. If you would like to see only the most recent termination of a PQB record on this report, it is suggested to utilize the option *Show latest termination per PQB only*.

- b. This report will show any termination that was made on a PQB record - appearance on this report only states that a PQB has been, at one point, terminated with a process date within the date parameters. This does not always mean that the current PQB account status is "terminated," as the PQB may have been reinstated since the reflected termination was processed.

YOUNG ADULTS POTENTIALLY AFFECTED BY PPACA

Purpose of Report: This report is intended to assist users in identifying participants under the age of 26 who may be affected by the Patient Protection and Affordable Care Act (PPACA). This act supplies that a dependent child/adult under the age of 26, who was at one time removed from their parent's coverage due to age requirement, could be eligible to be covered again as a dependent of said employee.

Data Reported: This report displays all PQBs currently under the age of 26 who have been entered with a primary qualifying event of "Your Becoming an Ineligible Dependent."

Report columns define the **PQB Name, Event Date, Current Status, End of COBRA Coverage** under the current COBRA event, and the date of the PQB's 26th Birthday (**26 on**).

Detailed Description:

- The report may be run based on:
 - a. Date Parameter: *Event Date On/Before* – The report will pick up PQB entries with an event date on or before the date specified.

Using these criteria, you may narrow the results to show only payments received from PQBs with a "Your Becoming an Ineligible Dependent" event before the specified date.

- Select "Yes" to *Group by Department* if you would like your report results to be further sorted by department assignment.

PQB NEW LISTING

Purpose of Report: Reports all newly added PQBs by the date they were entered into the system.

Data Reported: This report displays the date PQB was added, PQB Name, PQB Identifier, PQB Address, and PQB Status.

Subtotals are given for PQBs for each date added. A grand total for all PQBs within the date parameters specified is listed at the end of the report.

Detailed Description:

The report may be run based on several criteria:

- a. Using the *PQB Identifier* selection, you may alter the identifying value to use "SSN" or "Participant ID." Each of these values is pulled from corresponding value used when entering the PQB record.
- b. Date Parameters:
 - i. *Start Date* – The report will list PQBs who were entered into the system on or after the date specified. If the selection is left at the default setting of "Null," then all PQBs that have been added on the report.
 - ii. *End Date* – The report will list PQBs who were entered into the system on or before the date specified. If the selection is left at the default setting of "Null," then all PQBs that have been added on the report.
- c. By setting *Show PQB Address* to "Yes," PQBs' Addresses will be displayed in a column.
- d. Select "True" next to *Mask SSN* to hide Social Security Numbers and only display the last four digits (XXXX-XX-1111) on the report.

PQBS ON HOLD

Purpose of Report: Lists all PQBs whose record is marked "On Hold." This is done on the PQB's Detail screen.

The On Hold feature is used to prevent a PQB from being automatically terminated via Automatic Processing, regardless of the reason for termination.

Data Reported: Information included is the PQB Name, SSN, current Status, and Premium Due. A total for the number of PQBs listed is given. This report lists by PQB name.

Detailed Description:

- Settings for the output of this report:
 - a. Using the *PQB Identifier* selection, you may alter the identifying value to use "Social Security Number" or "Participant ID." Each of these values is pulled from corresponding value used when entering the PQB record.
 - b. Select "Yes" to *Group by Department* if you would like your report results to be further sorted by department assignment.

PQB BALANCE

Purpose of Report: This report is intended to assist users in identifying PQBs who have a balance on their account, as well as the account balance and the premium due date.

Data Reported: This report displays all PQBs with a balance on his or her account.

Report columns define the PQB Name, Department Name (if you choose to "Group by Department"), PQB Status, Account Balance, Premium Due Date, and Qualifying Event Date.

Detailed Description:

- The report may be run based on PQB Status – From this drop-down menu, you may include PQBs of "All," several, or a single status (Terminated, Enrolled, Added Not Notified, etc.) in your report results. This setting is not related to the current status of the PQB, but the status categories you wish to see on the report.

Using these criteria, you may narrow the results to show only PQBs with a balance on his or her account.

- Using the PQB Identifier selection, you may alter the identifying value to use "Social Security Number" or "Participant ID." Each of these values is pulled from corresponding value used when entering the PQB record.
- Select "Yes" to Group by Department if you would like your report results to be further sorted by department assignment.

PQB FAMILY

Purpose of Report: Reports all family member information for your choice of one or all PQBs.

Data Reported: Information included is the Name, SSN, Monthly Premium, and Family Member detail. Detail includes the Name, SSN, Relationship, and Date of Birth.

Detailed Description:

- The report may be sorted by PQB.

PQB ADDRESS CHANGE

Purpose of Report: This report shows PQBs who have had a change of address.

Data Reported: A listing of PQBs separated by PQB Status, displaying PQBs who have had a change of address.

Detailed Description:

- The report may be run based on Date Parameters:
 - i. Letters Printed On or After - The report will list Participants whose letters printed on or after this date.
 - ii. Letters Printed On and Before - The report will list Participants whose letters printed on or before this date.
- PQB Status – From this drop-down menu, you may include PQBs of "All," several, or a single status (Terminated, Enrolled, Added Not Notified, etc.) in your report results. This setting is not related to the current status of the PQB, but the status categories you wish to see on the report.
- Using the PQB Identifier selection, you may alter the identifying value to use "Social Security Number" or "Participant ID." Each of these values is pulled from the corresponding value used when entering the PQB record.
- Select "Yes" to Group by Department if you would like your report results to be further sorted by department assignment.

PQB SOCIAL SECURITY DISABILITY

Purpose of Report: Reports all PQBs who are on Social Security Disability within a specified date range.

Data Reported: This report displays the PQB Name, SSN, PQB Address, SS Ext Begins Date, SS Ext Ends Date, and Premium. The report may also be sorted by Last Name and SSN. A total for all PQBs within the date parameters specified is listed at the end of the report.

Detailed Description:

- The report may be run based on Date Parameters:
 - i. Start Date On or After – The report lists all Participants on Social Security Disability on or after the date specified.
 - ii. And Before – The report lists all Participants on Social Security Disability before the date specified.
- By setting Show Address to "Yes," PQBs' Addresses will be displayed in a column.
- Select "True" next to Mask SSN to hide Social Security Numbers and only display the last four digits (XXXX-XX-1111) on the report.
- The report may be sorted by:
 - c. Last Name - Lists Participants alphabetically by Last Name.
 - d. Social Security Number - Lists PQBs numerically by SSN.

PQB AGE SELECTION

Purpose of Report: Reports on PQBs who have attained or will attain a certain age during a specified date range.

Data Reported: This is useful to verify who is nearing an age that might affect their COBRA eligibility.

Information included is the Name, SSN, Department, and Status. A total of all PQBs is given.

Detailed Description:

The report may be run based on:

- a. PQB Age - Enter the age of the PQBs you want to list.
- b. Date Parameters:
 - i. On or After - The report will list Participants who were the age specified on or after this date.
 - ii. And Before - The report will list Participants who were the age specified on or before this date.

PQB TRADE ASSISTANCE LISTING

Purpose of Report: Reports all PQBs who are on Trade Assistance for a specified date range.

Data Reported: Information included is Department, PQB Name, SSN, Address (if you choose to show it), Date Trade Assistance was Approved, and Premium Amount. A total number of PQBs is listed at the end of the report.

Detailed Description:

- The report may be run based on:
 - a. Date Parameters:
 - i. On or After - The report will list Participants who were on Trade Assistance on or after this date.
 - ii. And Before - The report will list Participants who were on Trade Assistance on or before this date.
- You may select to Show Address in the listing by clicking "True" next to that setting.
- Sort the listing by selecting one from the Sort By drop-down list - Last Name only or SSN only.

Benefit Reports

BENEFIT PLAN LISTING

Purpose of Report: This report will display all benefit plans, with a list of PQBs assigned to that plan, separated by status.

Data Reported: This report displays the listing of PQBs assigned to a particular plan under the heading of that plan, and status subheading. Each plan is reflected on a separate page and is listed by **Carrier Name** and **Plan Name**.

The **Monthly Premium** amount listed does not reflect ARRA or other subsidy which may apply.

Subtotals (PQB count and premium total) are listed for each of the available heading/subheadings – Status, Plan, and Carrier.

Detailed Description:

- The report may be run based on PQB Status. From this drop-down menu, you may include PQBs of "All," several, or a single status (Terminated, Enrolled, Added Not Notified, etc.) in your report results. This setting is not related to the current status of the PQB, but the status categories you wish to see on the report.
- Select "Yes" to Group by Department if you would like your report results to be further sorted by department assignment.
- Using the PQB Identifier selection, you may alter the identifying value to use "Social Security Number" or "Participant ID." Each of these values is pulled from the corresponding value used when entering the PQB record.
- With the Display Only Active Plans setting, you may alter the PQBs listed under a particular plan by setting the option to "True," which will then only list PQBs who are assigned and active on the plan as of the current date. This means that if a PQB was assigned to the plan at one point, but there is a past end date on the plan, this PQB will not be listed on the report under the plan heading.
- Functions to note in this report:
 - a. A PQB with a benefit assigned with a future start date will be displayed in the listing of PQBs assigned to the plan, though the "Monthly Premium" field will be defaulted to \$0, as no premiums are truly being assessed for the plan as of the current date.
 - b. A PQB who was terminated for non-commencement will be displayed in the PQB listing (if the appropriate status is included), but as premiums were never assessed to this record, the "Monthly Premium" listed will be \$0. As well, the "Paid Through" field will be left blank.
 - c. If a PQB is assigned to multiple plans, they will be listed multiple times on the report – once under each of the assigned plans, and will be listed each time with the "Monthly Premium" amount applicable to that specific plan.
 - d. A Spouse/Dependent assigned to a benefit plan will be listed on the report as a separate entry from the PQB however, the "Monthly Premium" field on a dependent record will be listed as "--" so as not to adversely affect the report premium totals.

BENEFIT PLAN INFORMATION

Purpose of Report: This report displays benefit plan information for all Carriers.

Data Reported: This report displays a listing of benefit plan information by Carrier, and then Coverage Level. Each benefit plan listed is done so by **Carrier Name** and **Plan Description**.

The columns displayed in this report include:

- **Carrier** (Carrier Name)
- **Address** (City and State of the Carrier)
- **Plan Description** (Name of the benefit plan)
- **Plan Code**
- **Coverage Level** (The coverage level of the plan)
- **Monthly Premium** (Premium cost of the plan at the specified coverage level)
- **COBRA Premium** (The Monthly Premium cost plus the specified plan administration fee)
- **ARRA Premium** (The cost of the COBRA Premium, minus the possible 65% ARRA subsidy amount)
- **Plan Type** (The type set for the plan – Health, Dental, etc.)
- **Start Date** (The date the rate structure began)
- **End Date** (The date on which the rate structure is slated to end or was ended)
- **Dep. Age Limit** (The age specified in the benefit plan Option, “PQB Dependent Age Limit Eligibility for Plan Assignment”)
- **Conversion** (Displays whether the benefit plan is available for conversion to an individual plan at the end of continuation coverage)

Detailed Description:

- The report may be run based on *Costing Type*. Costing types include Flat Fee, Matrix Based, and Tier Based, or you may choose to display benefit plans of all costing types. Using these criteria, you may narrow the results to show only benefit plans of the specified costing types.
- By setting the *Display Only Active Plans* option to “True,” only active plans will be displayed. If there is a past end date on a plan, it will not be displayed. Setting this option to “False” will display all benefit plans, both active and inactive.

SPONSOR

Purpose of Report: Reports all Benefit Plans by Carrier.

Data Reported:

- The summarized version of this report includes information such as the Carrier Code and Name, the Benefit Plan Code and Name, Benefit Plan Description, the Start and End dates, and whether or not the plan is a Core or Non-Core plan.
- The detailed version of this report includes the following information, in addition to what is listed above in the summarized version: State Law, Plan Type, Coverage level, Costing type, Horizontal Bend, Vertical Bend, and Premium. If you choose "True" for the *Present Detailed Information* parameter, this information displays.

Detailed Description:

- The report may be run based on Date Parameters:
 - i. *On or After* - The report will list Sponsors with Benefit Plan start dates on or after this date.
 - ii. *And Before* - The report will list Sponsors with Benefit Plan start dates on or before this date.
- *Present Detailed Information* - Default setting is "False." When set to "True," the report will include additional information for each plan (State Law, Plan Type, Coverage Level etc.)
- *Present Only Most Current Plans* - Default setting is "False." Set to "True" if you do not want Benefit Plan segments with end dates listed.
- *Include Admin Fee in Plan Value* - Default setting is "False." When set to "True," the report will include the Admin fee included in the premium rates listed.

BENEFIT SINGLE TABLES

Purpose of Report: Reports single age rated table details.

Data Reported: Information included is the Rate Table and Description, the benefit plan Start and End Date, the age ranges and their corresponding rates.

PQB Status Reports

PQB ENROLLED

Purpose of Report: This report displays enrolled Participants and for what length of time they have left to enroll.

Data Reported:

Data displayed in this report includes the PQB's Status, Participant SSN/PQB ID and Full Name, Address, and event information such as Qualifying Date, Notification Date, Enrolled Date, Election Date, Election Received Date, and End of Eligibility Date.

Coverage information listed includes Carrier ID, Coverage Code, Effective Date, Expired Date, and Paid Thru Date.

A Grand Total is given at the end of the report (total number of PQBs in Enrolled status).

Detailed Description:

- The report may be run based on Date Parameters
 - i. *Enrolled On or After* – The report will pick up PQBs with an Enrolled Date on or after the date specified.
 - ii. *Enrolled On or Before* – The report will pick up PQBs with an Enrolled Date on or before the date specified.
- Using the *PQB Identifier* selection, you may alter the identifying value to use "SSN" or "PQB ID."

PQB NOTIFIED

Purpose of Report: This report shows all PQBs who have been notified of their COBRA coverage, but who have not yet responded to their notice.

Data Reported: A listing of PQBs with a status of "Notified, Awaiting Response."

Information included is Status, SSN, PQB name, Qualifying Event Date, Last Date to Elect, Event Code, Notification Date, Days Remaining, PQB Address, Benefit Plan Coverage, and Effective Dates.

Detailed Description:

- The report may be run based on Date Parameters:
 - i. *Notified On or After* – PQBs for whom the election notice was accepted for the first time on or after the date specified.
 - ii. *Notified On or Before* – PQBs for whom the election notice was accepted for the first time on or before the date specified.
- Settings included that may alter the amount, type, or format of information:
 - a. The identifying value can be altered by using *the PQB Identifier* selection to identify PQBs by Social Security Number or Participant ID.

PQB PAYMENT

Purpose of Report: Reports a complete history of payments received for all PQBs enrolled in Benefit Plans.

Data Reported: Information included is Carrier, Benefit Plan Code, Benefit Plan Description, Rate Structure, Coverage, PQB Name, Date Paid, Check Number, Payment Source, Paid Thru Date, and Amount Paid.

The report prints several coverage levels per page, which includes details regarding the payments made within the date range specified. These details include the Payment Date, Payment Amount, and the Benefit Plan in which the payment was applied. A total is given per Carrier and Administrative Fee.

Detailed Description:

- The report may be run based on Date Parameters:
 - i. Payment Received On or After – The report will pick up payments entered on or after the date specified.
 - ii. Payment Received On or Before – The report will pick up payments entered on or before the date specified.

Premium Reports

PREMIUM RECEIPT

Purpose of Report: This report will display all payments received within the specified timeframe toward the satisfaction of PQB premium billing.

Data Reported: This report will display a listing of all Payments received from the PQB, Employer Subsidy, or ARRA subsidy. The payment type will be displayed in the center column, followed by the payment date and amount.

At the bottom of each client section, a "Totals" box will be displayed specifying the following:

- **Total Payments Received** – The total amount of payments reflected in the reported section.
- **Total Payment Refunds** – The total amount of payments shown in the reporting section as a "refund" payment back to the PQB.
- **Total Payments Unapplied** – The total amount of payments reflected in the reporting section that are currently only applied to PQB balance (not applied to a specific premium due).
- **Total Payments Applied** – The total amount of payments in the reporting section which have been applied to a specific premium amount due. Further, this amount will be broken down according to the benefit plans to which it is applied.
- The final page of this report will reflect an overall total, encompassing all amounts reported (without specific plan breakdown).
- The **Payment Date** reflected is the "Entry Date" used when entering the payment.

Detailed Description:

- The report may be run based on:
 - a. Date Parameters
 - i. *Payment Received On or After* – The report will pick up payments with an "Entry Date" on or after the date specified.
 - ii. *Payment Received On or Before* – The report will pick up payments with an "Entry Date" on or before the date specified.

Using these criteria, you may narrow the results to show only payments received within a specified date range.

- Using the selection *Include Non-Cash Payments*, you may choose whether or not payments entered on the PQB record using the option "Non Cash payment" will be displayed on the report.
- Using the *PQB Identifier* selection, you may alter the identifying value to use "SSN" or "PQB ID." Each of these values is pulled from the corresponding value used when entering the PQB record.
- Using the *Group By Department* parameter, you can sort PQBs by their assigned department.
- Functions to note in this report:

- a. While voided payments are shown on this report listing with a "VOID" notation in the description, these values are not included in the totals sections of the report.
- b. Appearance of subsidy values on this report, both ARRA and Employer subsidies, will always be shown with a payment date on the first of the month. Appearance of these amounts on the report does not indicate that the PQB has fully satisfied the premium due in that period.
- c. Subsidy amounts will always be included in the total section "Total Payments Applied," even when the premium for the month to which they apply has not been fully satisfied.

PREMIUM RECONCILIATION

Purpose of Report: This report displays all satisfied premium amounts, with a detailed breakdown of the payments used to satisfy that premium.

Data Reported: This report will display a listing of payments as they have been attributed to monthly premiums due. There will be one PQB per page. Within the "boxed" detail headings, you will see the Premium Month, Total premium due, Total amount paid, and amount "open" if the premium has not been fully satisfied. Within the report detail, the first column displays the Plan Name, column two is the entry date of the payment referenced, column three displays the type of entry (check, subsidy, premium, etc.), and the fourth column shows the value of that entry, with negative values in parenthesis. A totals box is shown at the end of each section, PQB and Grand Totals.

- **Total Invoices Delivered** refers to the total amount of premiums that have been assessed to the PQB's ledger within the parameters specified.
- **Total Invoices Paid** represents the total amount of fully satisfied premium within the parameters specified.
- **Total Open Invoices** refers to the total amount of invoices assessed to the ledger that have not been satisfied. This value should account for the difference of the invoices delivered and paid.

Detailed Description:

- The report may be run based on:
 - a. Date Parameters
 - i. Invoice On or After – The report will pick up payments applied to premiums with a due date on or after the date specified.
 - ii. Invoice On or Before – The report will pick up payments applied to premiums with a due date on or before the date specified.

Using these criteria, you may narrow the results to show only payments received within a specified date range.

- Using the PQB Identifier selection, you may alter the identifying value to use "Social Security Number" or "Participant ID." Each of these values is pulled from the corresponding value used when entering the PQB record.
- Functions to note in this report:
 - a. The amount **Total Invoices Delivered** may not be equal to the sum of all premiums shown on the report if the PQB is currently active and not paid to current date. In this case, those unsatisfied premiums have been "delivered," but have not been paid, and therefore are not detailed on the report.
 - b. A payment made may be assigned to satisfy multiple premium or fee amounts.
 - c. **Unapplied payments** typically refer to payments on the PQB ledger that are not applied to premiums, however, payments that have been voided from the PQB ledger

may reflect on this report simply as "unapplied payments," which will not affect the "Account balance" or any other amount shown in the PQB/Grand total box.

RECONCILIATION BY PAYMENTS (VOUCHER REPORT)

Purpose of Report: This report displays the application breakdown of each payment included within the specified timeframe.

Data Reported: This report will display all payments entered on the PQB ledger within the date parameters specified. Under each payment, the detail of how this payment has been applied (plan and premium/admin fee) will be included.

The first and third columns represent the due date of the plan premium that a portion of the payment is being attributed to. The fourth column represents the dollar amount of that premium that remained unsatisfied when the payment was entered to the record. IE – If \$5 of a total \$25 premium was satisfied by a previous payment, this column will display \$20. The final column represents the amount of the specified payment which was applied to the named premium.

Like other premium reports, this report includes a total summary at the end of the report.

Detailed Description:

- The report may be run based on:
 - a. Date Parameters

i. Payment On or After – The report will pick up payments with an “Entry Date” on or after the date specified.

ii. Payment On or Before – The report will pick up payments with an “Entry Date” on or before the date specified.

Using these criteria, you may narrow the results to show only payments received within a specified date range.

- Using the selection *Include Non-Cash Payments*, you may choose whether or not payments entered on the PQB record using the option “Non Cash payment” will be displayed on the report.
- Using the *PQB Identifier* selection, you may alter the identifying value to use “SSN” or “Participant ID.” Each of these values is pulled from the corresponding value used when entering the PQB record.
- Using the *Include ARRA Subsidies* setting, you may choose to include or exclude ARRA subsidy notations and their attributions on this report
- You may add additional subheadings using the *Group By* selection, from which you may divide the report by PQBs’ assigned department, or the benefit to which the named premium is attributed.
- Functions to note in this report:
 - a. While voided payments are shown on this report listing with a “VOID” notation in the description, these values are not included in the totals sections of the report. As well, you will notice that no attribution breakdown is shown for voided payments, as they are not applied to any premium.

- b. Payments applied to POB balance will be shown on the report and will be included in the report totals; however, no premium application breakdown will accompany these records.
- c. If the setting *Group By* is set to "Benefit Plan," this may cause a single payment to be divided and shown under multiple headings of the report, as this payment may have been attributed to premiums across multiple plans.

RECONCILIATION BY PLAN

Purpose of Report: This report provides a listing of all premiums satisfied, sorted by the plan to which they apply. Only fully satisfied premium months will be displayed.

Data Reported:

This report will display each existing benefit plan, then each PQB assigned to that plan. In the **PQB Name** column, all payments applied to monthly premiums will be listed.

Columns one and two of the bold report detail rows reflect the month and due date of premiums referenced; column three of this row reflects the full, satisfied premium amount.

Within the sub-rows, the first column reflects the payment "Entry Date," column two reflects the payment type and full payment amount; and column three reflects the amount of that payment that is attributed to the referenced premium.

"Total" boxes will be displayed after each benefit plan, as well as a "Grand Total" on the final report page.

Detailed Description:

- The report may be run based on Date Parameters:
 - i. *Invoice On or After* – The report will pick up payments applied to premiums due on or after the date specified.
 - ii. *Invoice On or Before* – The report will pick up payments applied to premiums due on or before the date specified.

Using these criteria, you may narrow the results to show only payments received within a specified date range.

- Select "Yes" to *Group by Department* if you would like your report results to be further sorted by department assignment.
- Using the *PQB Identifier* selection, you may alter the identifying value to use "Social Security Number" or "Participant ID." Each of these values is pulled from the corresponding value used when entering the PQB record.
- Functions to note in this report:
 - a. Voided and "Unapplied" payments will not be reflected on this report. Only payments which have been applied to a fully satisfied premium month will be shown.
 - b. As a single payment may be applied to multiple premium amounts, you may notice that a single payment entry may be shown in several sub-rows – displayed once with each premium to which a portion is applied.

RECONCILIATION BY DISBURSEMENT

Purpose of Report: This report displays all premium payments that have been disbursed within the date parameters specified.

Data Reported:

This report displays a listing of all disbursed payments, sorted by check recipient, check number, and premium due date. Total boxes are shown for each recipient as well as a "grand total" on the final page of the report.

In the bold Check Detail row, you will notice the check number, and total check amount in columns two and three.

In the report detail, column two reflects the associated Plan Name, column three reflects the PQB Name, and column four displays the amount disbursed.

Detailed Description:

- The report may be run based on Date Parameters:
 - i. Disbursed On or After – The report will pick up payments/premiums disbursed on or after this date.
 - ii. Disbursed On or Before – The report will pick up payments/premiums disbursed on or before this date.

Using these criteria, you may narrow the results to show only payments disbursed within a specified date range.

- Using the Time Period selection, you may choose to further limit your target area by selecting a single month for which you would like to show disbursements. If this report is run without date parameters, but the Time Period selection set to "January 2012," the report will display all January 2012 premiums that have been disbursed within your system, regardless of the date that the disbursement was performed.
- Functions to note in this report:
 - a. If using the function Time Period, you may only select to report on a single disbursement period at one time.

ELECTRONIC PAYMENTS

Purpose of Report: This report provides a listing of all payments made electronically to PQB records, such as credit card or electronic check payments.

Data Reported:

Lists all payments, sorted by date, that have been made electronically (Credit Card or Electronic Check). This displays the type of payment, current processing status, premium due, associated electronic payment fees, and total payment amount. The final page of the report includes a "Grand Totals" section.

Detailed Description:

- The report may be run based on:
 - a. Date Parameters
 - i. *On or After* – The report will pick up payments made with a "Payment Date" (entry by the PQB) on or after this date.
 - ii. *On or Before* – The report will pick up payments made with a "Payment Date" (entry by the PQB) on or before this date.

Using these criteria, you may narrow the results to show only payments disbursed within a specified date range.

- Functions to note in this report:
 - a. Payments will be reflected on this report as soon as they are entered by the PQB, even if they have not yet been approved through the merchant gateway (offline).
 - b. Electronic payments may only be entered by the PQB if the proper Employer level options and "electronic payment setup" have been configured.

PREMIUM REDUCTION SUMMARY

Purpose of Report: This report lists all ARRA subsidy payments that have been applied to satisfied monthly premium amounts.

Data Reported: This report is sorted by PQB. Subtotals are included at the end of each subsection, with a "Grand Totals" box on the final page of the report.

The default width of this report does not fit in a single page. A scroll bar is made available at the bottom of the report screen which enables the user to "scroll over" to view information to the far right of the page ("Total" field seen in the sample below).

The **Total ARRA Reduction** shown within totals boxes is a sum of the **ARRA Amount** column of the corresponding subsection.

Detailed Description:

- The report may be run based on:
 - a. Date Parameters –
 - i. *Payment Date On or After* – The report will pick up ARRA Subsidy payments with an "Entry Date" on or after the date specified.
 - ii. *Payment Date On or Before* – The report will pick up ARRA Subsidy payments with an "Entry Date" on or before the date specified.
 - b. *PQB Status* – From this drop-down menu, you may include PQBs of "All," several, or a single status (Terminated, Enrolled, Added Not Notified, etc.) in your report results.

Using these criteria, you may narrow the results to show only payments received within a specified date range.

- Using the selection *Include Non-Cash Payments*, you may choose whether or not payments entered on the PQB record using the option "Non Cash payment" will be displayed on the report.
- Using the *PQB Identifier* selection, you may alter the identifying value to use "Social Security Number" or "Participant ID." Each of these values is pulled from the corresponding value used when entering the PQB record.
- Functions to note in this report:
 - a. While the report parameters pull based on "Payment Date," it is important to note that ARRA Premium Subsidy notations are always made at the first of the month to which they apply. This means that if your report date parameters do not encompass the first of at least a single month (such as 04/15/2010 to 04/30/2010), no information will be available to report.
 - b. The date on which the associated premium was satisfied does not affect this report; these values are identified based solely by the monthly premium to which they apply.
 - c. Only ARRA Premiums which are applied to premiums that have been fully satisfied will be reflected on this report. This means that ARRA amounts for future premiums (which have not yet been placed on the ledger) will not be shown.

PREMIUM REDUCTION SUMMARY BY PAYMENTS

Purpose of Report: This report displays payment and ARRA subsidy information based on the entry date of the PQB payment which fully satisfied the related monthly premium. By using this report, you may see the ARRA premium amounts as they are truly used to complete the PQB monthly premium.

Data Reported:

This report is sorted by PQB Group and Payment (by Payment Entry Date).

Within the payment detail rows the columns are as follows: Premium Month, Plan Name, Charge Type (Premium or Admin Fee), Total Charge Amount, and applied "ARRA Reduction."

Total boxes are included at the "Grand Total" levels, presenting a sum of the "ARRA Reduction" reported in that section.

Detailed Description:

- The report may be run based on:
 - a. Date Parameters –
 - i. *Payment Entered On or After* – The report will pick up PQB payments with an "Entry Date" on or after the date specified.
 - ii. *Payment Entered On or Before* – The report will pick up PQB payments with an "Entry Date" on or before the date specified.
 - b. *PQB Status* – From this drop-down menu, you may include PQBs of "All," several, or a single status (Terminated, Enrolled, Added Not Notified, etc.) in your report results.

Using these criteria, you may narrow the results to show only payments received within a specified date range.

- Using the PQB Identifier selection, you may alter the identifying value to use "Social Security Number" or "Participant ID." Each of these values is pulled from the corresponding value used when entering the PQB record.
- Functions to note in this report:
 - a. This report will only display actual PQB payments. As opposed to payment reports discussed previously, which include employer and ARRA subsidy "payments," this report displays ARRA amounts only alongside the PQB payment which satisfied the associated monthly premium. For example, – if a payment made 01/12/2010 satisfied the January, February, and March premiums, all ARRA subsidies for those 3 months would be shown attributed to the 01/12/2010 payment if this report were run with date parameters 01/01/2010 to 01/15/2010.
 - b. This report, like other premium reports, cannot report future month premium or ARRA amounts, as those premiums and associated ARRA subsidy amounts have not yet been applied to the PQB ledger.

ARRA AUDIT

Purpose of Report: This report displays the total amount of premiums billed, ARRA subsidy applied, and payments made to a PQB record.

Data Reported:

This report contains the total amount of premiums billed, ARRA subsidy applied, and payments received from an Assistance Eligible Individual (AEI) up to current date.

This report does not include total calculations such as "grand totals."

The field **Termination Date** reflects the PQB's termination of Employment (COBRA event), not a termination from COBRA coverage.

Detailed Description:

- The report may be run based on Date Parameters –
 - i. *Event Date On or After* – The report will pick up PQBs with a Qualifying Event date on or after the date specified.
 - ii. *Event Date On or Before* – The report will pick up PQBs with a Qualifying Event date on or before the date specified.

Using these criteria, you may narrow the results to show only PQBs who experienced qualifying events within a specified date range.

- Functions to note in this report:
 - a. As this report reflects information "to current date," it would be common, in fact expected, that the information displayed on this report would vary from day to day, even when run with the same parameters.
 - b. While in many cases, the **Total ARRA Subsidy** and **Total Received from AEI** should sum to the **Total Premium Amount**, this report does not account for non-ARRA related Employer subsidies. For this reason, these amounts may not always be reconciled.

PREMIUM RECEIPT WITH PAYMENT

Purpose of Report: This report lists all payment amounts according to the specific premium portions to which that payment was attributed.

Data Reported:

This report lists all amounts paid within the specified parameters, according to the specific premium portions to which each payment entry was applied.

This report includes the Department, PQB Name, SSN, Payment Type, Check Number, Carrier ID, Billing Period, Payment Date, Payment Amount, and Subtotal by Company.

This listing is sorted by PQB and billing period, but is not divided into subheadings.

A "Grand Total" row at the bottom of the report.

Detailed Description:

- The report may be run based on Date Parameters –
 - i. Payment Received On or After – The report will pick up payments entered on or after the date specified
 - ii. Payment Received On or Before – The report will pick up payments entered on or before the date specified

Using these criteria, you may narrow the results to show only PQBs with premium amounts satisfied by payment within a specified date range.

- Functions to note in this report:
 - a. Appearance of a premium portion on this report does not signify that the entire premium amount due for the corresponding **Billing Period** has been completely satisfied.
 - b. A single check entry may be referenced multiple times on this report if that check was used to satisfy multiple premium portions, such as the monthly premium of two separate plans within the same month, the premium AND admin fee for a single plan, or the same plan in different billing months.
 - c. Subsidy amounts, as soon as they are placed on the ledger, are applied to premium. Therefore, these amounts will be shown on this report, even if the corresponding billing months have not been satisfied. Subsidy notations are always made with an entry at the first of the corresponding month, and therefore will be shown when the report parameters encompass the first of a month.
 - d. "Unapplied" amounts occur only when the PQB has paid up to and beyond the most current premium due amount.
 - e. As voided payments are not applied to any premium amount, those payments are not reflected on this report.

ARRA IRS

Purpose of Report: This report displays all payments to a PQB record, accompanied by the amount of ARRA Subsidy attributed alongside that payment to fully satisfy a monthly premium amount. This is intended to display a true time application of ARRA subsidy amounts.

Data Reported:

This report displays the amount of ARRA Subsidy applied based on the "Entry Date" of related payments received from the PQB.

The data on this report is separated by PQB. The format of this report is specified specifically for reporting of these premiums upon IRS request.

Total lines are shown at the end of each PQB section, as well as a "Grand Totals" line on the final page of the report.

Detailed Description:

- The report may be run based on Date Parameters –
 - i. StartDate – The report will pick up payments and related ARRA subsidies applied on or after the date specified.
 - ii. EndDate – The report will pick up payments and related ARRA subsidies applied on or before the date specified.

Using these criteria, you may narrow the results to show only PQBs who experienced qualifying events within a specified date range.

- Functions to note in this report:
 - a. Attributable ARRA subsidy is assigned based on the PQB payment "completing" the PQB portion of the premium due. According to government rules, an Employer may only claim ARRA subsidy amounts for reimbursement as the PQB satisfies the related premium and that ARRA subsidy is required to be paid in tandem. IE – The client may not claim their 65% of the June Premium for John Example until John Example has paid his 35% portion.

ARRA ELIGIBLE REDUCED HOURS

Purpose of Report: This report is intended to assist in identifying PQBs added with a “reduced hours” event after September 1st 2008, as PQBs added with a reduced hours event after this date who did not continue COBRA coverage and later experienced a termination of employment, may again qualify for COBRA and ARRA continuation under the 2010 Temporary Extension Act.

Data Reported:

This report provides a listing of PQBs who experienced a loss of coverage event after 09/01/2008, and whose COBRA coverage has at this point been terminated without exhausting the COBRA period.

This listing includes PQB identifying information and information regarding the number of months of COBRA coverage and ARRA subsidy used in relation to their prior “Reduced hours” event.

Detailed Description:

- Using the *PQB Identifier* selection, you may alter the identifying value to use “Social Security Number” or “Participant ID.” Each of these values is pulled from the corresponding value used when entering the PQB record.
- Functions to note in this report:
 - a. This report's intention is linked directly to the Temporary Extension Act of 2010. As the need to administrate according to that act diminishes over time, the function of this report will also become obsolete.

DISBURSEMENTS INCLUDING NON-CASH PAYMENTS

Purpose of Report: This report displays all payments for premiums that were part of a disbursement, including payments marked as "non-cash," which were used to fulfill a premium even though they were not included in the disbursement check.

Data Reported: A listing of all disbursement amounts, listed alphabetically by Sponsor. The report is then further grouped by the disbursement time period and PQB name, and displays which payments were included in disbursement checks (cash payments) and which were not (non-cash payments) in separate sections.

At the end of each grouping, the totals are given on a new row, noted in the "Total" columns. The totals for the entire report are also given at the end of the report.

The totals for the non-cash payments are displayed in the non-cash breakdown for each time period under the Sponsor, as well as at the end of each Sponsor and Grand Total section.

The columns displayed in this report include:

- **Carrier**
- **Type** - "Disbursement" or "Non-Cash"
- **Check Date**
- **Check Number**
- **Disbursement Period**
- **Plan** - Benefit Plan name
- **PQB** - The name of the PQB
- **Amount** - The amount disbursed from the PQB
- **Total Premiums Disbursed** - The total of the payments disbursed for the section
- **Total Adjustments** - The total of the adjustments disbursed for the section
- **Total Non-Cash Payments** - The total of the non-cash payments for the section
- **Disbursement Total** - The total amount disbursed for the section, which is the sum of premiums and adjustments
- **Pending Adjustments**

Detailed Description:

- The report may be run based on Date Parameters:
 - i. *Disbursed On or After* – The report will pick up payments/premiums disbursed on or after this date.
 - ii. *Disbursed On or Before* – The report will pick up payments/premiums disbursed on or before this date.

Using these criteria, you may narrow the results to show only payments disbursed within a specified date range.

- Using the *Time Period* selection, you may choose to further limit your target area by selecting a single month for which you would like to show disbursements. If this report were run without date parameters, but the *Time Period* selection set to "January 2012," for example, the report

would display all January 2012 premiums that have been disbursed within your system, regardless of the date that the disbursement was performed.

- Functions to note in this report:
 - a. If using the function *Time Period*, you may only select to report on a single disbursement period at one time.

UNAPPLIED PREMIUM

Purpose of Report: This report lists Participants who have made payments beyond the current due date that have not yet been applied to a premium due.

Data Reported: This report will show a listing of payments made by Participants and what portion of that payment has not yet been applied to a premium due. Within the report detail, there are columns listing:

- **Department** - Optional column, lists Department to which the PQB is currently assigned. If PQB is not assigned to a Department, "Not Assigned" will appear in the column for that PQB.
- **Participant ID** - User-defined value; serves as another method to identify Participants, if assigned
- **PQB Name** - Name of the Participant
- **Status** - Current Status of the Participant
- **Date Paid** - The date the payment was submitted
- **Payment Amount** - The payment amount made that applied towards an applicable premium
- **Unapplied Premium Amount** - The amount of the payment that did not apply to the premium for the current month
- **Next Premium Due Date** - The date the next premium is due after all unapplied premium payments have been exhausted



This field will always pull the current due date, even if the premium has been paid past that day. Please refer to the **Detailed Description** below for more information.

- **Regular Monthly Premium** - the "typical" monthly premium, i.e. the amount of premium that the Participant can expect to pay each month

The Grand Total is shown at the end of the report.

Detailed Description:

- The report may be run based on PQB Status. From this drop-down menu, you may include PQBs of "All," several, or a single status (Terminated, Enrolled, Added Not Notified, etc.) in your report results.

Using these criteria, you may narrow the results to show only payments received within a specified date range.

- Select "Yes" to Group by Department if you would like your report results to be further sorted by department assignment.
- Functions to note in this report:
 - a. The "Next Premium Due Date" column will only display up to the current month's premium due, even if the Participant has paid past that date.

For example: If the current month is February, and a Participant makes a payment that satisfies premiums through the month of May (so the next premium would technically be due in June), the next premium due listed in this report will be March 1st.

- b. Deficient payments will also be listed.

For example: If a Participant is in an "Enrolled Pending Payment" status and makes a partial payment, the unapplied payment will be listed with a due date of the current month.

ADMINISTRATIVE FEE COLLECTED AND CREDITED

Purpose of Report: This report displays administrative fees that were collected with premium payments and credited during a specified date range.

Data Reported: This report will show a listing of payments made by Participants and what portion of that payment applied to an administrative or NSF (Non-Sufficient Funds/Returned Check) fee. Within the report detail, there are columns listing:

- **Department** - Lists the name of the department to which the Participant is currently assigned
- **PQB Name** - Name of the Participant
- **Participant ID** - User-defined value that serves as another method to identify Participants
- **SSN** - Social Security Number of the Participant. The first 5 digits are masked
- **Payment Date** - The date the payment was entered
- **Payment Amount** - The amount of the payment made that applied towards an applicable premium



Only payments that satisfy the premium in full will be displayed. Please refer to the **Detailed Description** section below for more information.

- Admin Fee - The administrative fee that the Participant paid.
- NSF Fee - The Non-Sufficient Funds/Returned Check fee, which is set in the Employer Options.

The total amounts are shown at the end of each section and Grand Total.

Detailed Description:

- The report may be run based Date Parameters:
 - i. Payment Date On or After – The report will pick up payments applied to premiums with a payment date on or after the date specified.
 - ii. Payment Date On or Before – The report will pick up payments applied to premiums with a payment date on or before the date specified.

Using these criteria, you may narrow the results to show only payments received within a specified date range.

- Functions to note in this report:
 - a. This report only displays payments that satisfy the premium for a given month **and** the corresponding administrative fee.

For example: A Participant has a \$100.00 premium and there is a 2% administrative fee (\$2). If a payment of \$100.00 is entered on 02/01/2011, the payment will not be displayed in this report, because even though it satisfies the monthly premium, it did not satisfy the premium **and** the administrative fee for that month. If a payment of \$102.00 is entered instead, this payment will be displayed in the report, because it does satisfy both.

- b. When a deficient payment is entered, any subsequent payments will go to satisfying the premium amount. Once the premium is satisfied, any additional payments will be applied to any outstanding administrative or NSF fees.
- c. Payments will be applied after the premium and any administrative fees have been satisfied - meaning payments are applied to NSF fees last.

PREMIUM END BALANCE WITH TERMINATED PQBS

Purpose of Report: This report displays end balances for PQBs. It allows you to view either all, only Enrolled, or only Terminated PQBs.

Data Reported: Listed in this report are all PQBs who have an end balance and fall within the date parameters.

Information given includes PQB Name, SSN, Paid Thru Date, Beginning Balance, Amount Billed to this Period, Payment Received this Period, and End Balance.

Detailed Description:

- The report may be run based on several criteria:
 - a. Date Parameters:
 - i. Payment Made On or After – The report will list payments made on or after the date specified.
 - ii. Payment Made Before – The report will list payments made before the date specified.
 - b. PQB Status – From this drop-down menu, you may include PQBs of All, Enrolled only, or Terminated only status in your report results.

Using these criteria, you may narrow the results to show only PQBs who made payments within a specified date range.

- Selecting "True" for the Included Returned Check Fee setting will include the returned check fee in end balances listed.

Employer Reports

CERTIFICATE OF MAILING

Purpose of Report: This report provides of a listing of all letters printed to be mailed within a specified period.

Data Reported:

Displays a listing of all letters sent, sorted by letter type, department (if the setting is selected), and the PQB Name/Address to which it was sent.

Detailed Description:

- The report may be run based on:
 - a. Correspondence to Include – From this drop-down menu, you may select which letter templates to include in your results.
 - b. Date Parameters
 - i. Accepted On or After – The report will pick up letters which were accepted on or after the date specified.
 - ii. Accepted On or Before – The report will pick up letters which were accepted on or before the date specified.

Using these criteria, you may narrow the results to show only specified letter types printed within a specified date range.

ACTIVE PQB LISTING

Purpose of Report: This report provides a listing of all PQBs within the system of a particular status.

Data Reported:

This report displays a listing of PQBs, sorted by Department (if option is selected) and then PQB status.

The **Premium** listed corresponds to the amount displayed as the "Typical Monthly Premiums" on the PQB record – this amount does not account for Employer or ARRA subsidy.

PQB Totals show the number of PQBs in each status, and at the end of the report, the total number of PQBs listed.

The layout of this report is formatted to resemble a spreadsheet design for easier viewing and manipulation.

Detailed Description:

- The report may be run based on:
 - a. *PQB Status* – From this drop-down menu, you may include PQBs of "All," several, or a single status (Terminated, Enrolled, Added Not Notified, etc.) in your report results.

Using these criteria, you may narrow the results to show only PQBs from within a specified status (Added not Notified, Enrolled, etc.).

- Using the *PQB Identifier* selection, you may alter the identifying value to use "Social Security Number" or "Participant ID." Each of these values is pulled from the corresponding value used when entering the PQB record.
- By setting *Show PQB Address* to "True," PQBs' Addresses will be displayed in a column.
- Using *Show Only Leave of Absence*, you may restrict this report to show only PQBs who were added with the Qualifying Event type "Leave of Absence" – this is intended to assist an Administrator in identifying all PQBs who may be within a Leave of Absence.
- Select "Yes" to *Group by Department* if you would like your report results to be further sorted by department assignment.
- Select "True" next to *Mask SSN* to hide Social Security Numbers (XXXX-XX-1111) on the report.

ELECTION NOTICES

Purpose of Report: This report displays all PQBs who were sent an election notice within the data parameters specified.

Data Reported:

This report is sorted by coverage type (benefit plan) and PQB.

Report detail provides the Event date, Date of Notification, Election Period End Date, and the number of days left to enroll, if applicable and selected.

A count of PQBs is included at the end of each subsection.

Detailed Description:

- The **Notified** date shown reflects the date that the Election Notice was accepted in the WebCOBRA Correspondence Module.
- The report may be run based on:
 - a. Date Parameters
 - i. *Notified On or After* – PQBs for whom the election notice was accepted for the first time on or after the date specified.
 - ii. *Notified On or Before* – PQBs for whom the election notice was accepted for the first time on or before the date specified.

Using these criteria, you may narrow the results to show only PQBs for whom notices were accepted within a specified date range.

- Several settings are included that may alter the amount, type, or format of information:
 - a. The identifying value can be altered by using the *PQB Identifier* selection to identify PQBs by Social Security Number or Participant ID.
 - b. Option to *Show Benefit Plan* or omit that information from results. If shown, this will be listed in subtext under the PQB name.
 - c. Select "Yes" to *Group by Department* if you would like your report results to be further sorted by department assignment.
 - d. *Show Days Left* is by default activated, though may be set to "False" if you would like to remove this column from the report.
- Functions to note in this report:
 - a. As this report is sorted by PQB coverage level, a PQB may be shown multiple times for the same notification. This may be due to a PQB's multiple benefit plan assignments, with variant coverage levels.

- b. The coverage level "None" may be applied to PQBs that have no currently active benefits assigned, or to plans that do not have coverage level tiers, such as "Flat Fee" plans.

NOTES

Purpose of Report: This report provides a listing of all notes made to the Carrier or PQB record.

Data Reported:

This is a simple listing of all notes made within a set time period.

This report displays a separate page per Carrier, or PQB, dependent on report settings, and lists the following information:

- **Type** – The type of entry that was made (note, appended note, etc.).
- **User Name** – The user who added the note.
- **Text** – The message that was entered on the note.
- **Date Entered** – The date the note was added to the system.

Detailed Description:

- The report may be run based on several criteria:
 - a. *Retrieve Notes for* - From this drop-down menu, you may select "Employer," "Carrier" or "PQB" – notes may be added to the record "Notes" tab at each level. Through this selection, you may specify which level to report on.
 - b. Date Parameters:
 - i. *On or After* – The report will pull notes added to the record on or after the date specified.
 - ii. *On or Before* – The report will pull notes added to the record on or before the date specified.

Using these criteria, you may narrow the results to show only notes added at the PQB level within a specified date range.

EMPLOYEE LISTING

Purpose of Report: This report provides a listing of all "Active Employees."

Data Reported:

This report provides the identifying information of all Active Employees.

Detailed Description:

- The report may be run based on PQB Status. Using these criteria, you may narrow the results to show only Participants belonging in the specified status (Current Employee).
- Several settings are included that may alter the amount, type, or format of information:
 - a. The identifying value can be altered by using the PQB Identifier selection to identify PQBs by SSN or Participant ID.
 - b. Option to Show PQB Address or omit that information from results.
 - c. Select "Yes" to Group by Department if you would like your report results to be further sorted by department assignment.

COBRA GENERAL NOTICE

Purpose of Report: This report provides a listing of any Employees and PQBs who have had a COBRA General Notice generated and accepted through correspondence for them.

Data Reported:

This report provides a list of which Employees and PQBs have had a COBRA General Notice generated and accepted through correspondence, within the specified date parameters.

The columns can be set to list by Department, Name, Social Security Number (SSN) (or another PQB identifier), and the Print Date.

Detailed Description:

- The report may be run based on:
 - a. Date Parameters –
 - i. *Generated On or After* – The report will pick up payments and related ARRA subsidies applied on or after the date specified.
 - ii. *Generated On or Before* – The report will pick up payments and related ARRA subsidies applied on or before the date specified.

Using these criteria, you may narrow the results to show only PQBs whose COBRA General Notice was generated/accepted within a specified date range.

- Several settings are included that may alter the amount, type, or format of information:
 - a. The identifying value can be altered by using the PQB Identifier selection to identify PQBs by "Social Security Number" or "Participant ID."
 - b. Select "Yes" to *Group by Department* if you would like your report results to be further sorted by department assignment.
 - c. Select "True" to Mask SSNs.

DEPARTMENTS

Purpose of Report: Reports PQBs by Department assignment.

Data Reported: Information included is PQB Name, SSN, and Next Premium Due.

A total number of PQBs per Department along with a total of premiums due per Department is given.

Detailed Description:

- The report may be run based on several criteria:
 - a. Using the *Employee Identifier* selection, you may alter the identifying value to use "SSN," or "Participant ID." Each of these values is pulled from the corresponding value used when entering the PQB record.
 - b. Select "True" next to *Mask SSN* to hide Social Security Numbers and only display the last four digits (XXXX-XX-1111) on the report.
- Totals included in the report:
 - a. Department Totals:
 - The total of Participants within the Department. (This does include COBRA Notice Employees.)
 - The Total Premium due for each department based on Participants. (This does include COBRA Notice Employees who show as a \$0.00 premium.)

EMPLOYER LISTING

Purpose of Report: Lists basic information about your Employer that has been entered into the system.

Data Reported: Information listed includes the Employer Name, Code, Address, and Contact Information.

A total for the number of PQBs assigned to each company is given.

Detailed Description:

This report provides basic information regarding the Employer in the WebCOBRA system.

LETTER PRODUCTION

Purpose of Report: Reports letters produced according to a date range entered and letter type specified.

Data Reported: Information included is the Letter Description and Quantity of each type.

A total for the number of letters produced is given.

Detailed Description:

- The report may be run based on:
 - a. Letter Selection – You may select specific letter types to run the report for or select all to view all letters that have been produced.
 - b. Date Parameters -
 - i. Generated On or After - The report will display letters that were produced on or after the date specified.
 - ii. Generated On or Before - The report will display letters that were produced on or before the date specified.
- Page Break On Grand Total - Select "True" if you would like the grand total of the number of letters in the report to be on a separate page.

CERTIFICATE OF MAILING PLUS

Purpose of Report: Lists all PQBs who have had a letter produced according to the date range entered.

Data Reported: Information included is the PQB Name and Address. This report is grouped by letter type and can be further grouped by department.

A total for the number of PQBs listed is given. This report lists by PQB Name.

Detailed Description:

- The report may be run based on Date Parameters -
 - i. Generated On or After - The report will display PQBs with letters that were produced on or after the date specified.
 - ii. Generated On or Before - The report will display PQBs with letters that were produced on or before the date specified.

NOTIFICATIONS PLUS 2

Purpose of Report: Identifies PQBs who have received a COBRA notification letter during a specified date range.

Data Reported: Information included is the PQB Name, SSN, PQB Event Date, Date Admin Received Notification, PQB Notified Date (which is the date the COBRA notification letter printed), Election End Date, Days Left Date (the number of days left in the enrollment window), Mailed Notice Days, Admin Notice Days (the number of days from the Event Date to the Date Admin Received Notification), and Benefit Plan.

PQBs are sorted by the type of coverage they have.

If the PQB is Enrolled or Terminated, then the Days Left column will display the status instead of the number of days left.

A total for the number of PQBs is given, along with subtotals for coverage levels.

Detailed Description:

- The report may be run based on Date Parameters -
 - i. On or After - The report will display PQBs with letters that were produced on or after the date specified.
 - ii. On or Before - The report will display PQBs with letters that were produced on or before the date specified
- You may select "True" to Sort by Department if you would like your report results to be further sorted by department assignment (sub-heading).

EMPLOYER LABELS 1 1/3 x 4 by 2

Purpose of Report: The Employer Label reports will print labels in a pre-defined format: 1 1/3 x 4 by 2 (Avery 5162 & 5262).

Data Reported:

Labels include the following information: The Primary Contact's Name, and the Employer's Name and Address. For example:

John Smith
ABC Employer
123 Greenbriar Ln.
Houston, TX 77079

Detailed Description:

The report will produce a label 1 1/3" x 4" for the Employer in **two separate columns** on a standard 8 1/2" x 11" sheet of paper.



For best results, we recommend using the **Avery 5162 & 5262** label type.

EMPLOYER LABELS 1 x 2 5/8 by 3

Purpose of Report: The Employer Label reports will print labels in a pre-defined format: 1 x 2 5/8 by 3 (Avery 5160 & 5260).

Data Reported:

Labels include the following information: The Primary Contact's Name, and the Employer's Name and Address. For example:

John Smith
ABC Employer
123 Greenbriar Ln.
Houston, TX 77079

Detailed Description:

The report will produce a label 1" x 2 5/8" for the Employer selected in **three separate columns** on a standard 8 1/2" x 11" sheet of paper.



For best results, we recommend using the **Avery 5160 & 5260** label type.

Retiree Reports

RETIREE STATUS

Purpose of Report: This report provides a listing of Retirees based on the current status of the retiree group.

Data Reported:

This report displays a listing of Retirees along with their current account standing information.

Detailed Description:

- The report may be run based on *Retiree Status*. Using these criteria, you may narrow the results to show only Retirees' records that currently fall into a particular status (Retiree Enrolled or Retiree Terminated).
- Using the *Days Past Due* setting, you may choose to display only Retiree records who are over a specified number of days past their premium due date. For example, if you enter a value of "30" in this field, only Retirees who are 30 days or more past their premium due date will be shown on the report.
- Using the *Retiree Identifier* selection, you may alter the identifying value to use "Social Security Number" or "Participant ID." Each of these values is pulled from the corresponding value used when entering the Participant record.
- Functions to note in this report:
 - a. The "Days Past Due" field has a minimum value of "0." Retirees paid into the future will display a "0" value in this field.
 - b. In the account balance field, values shown inside of parenthesis are credit balances. Terminated retirees will have an account balance less than or equal to \$0.00, they will never have an outstanding amount due.
 - c. Future "Premium Due" dates are estimated based from the retiree's current rate assignments.

RETIREE TERMINATION

Purpose of Report: This report will show all Retirees for whom a termination was effective within the date range specified.

Data Reported:

This report provides a listing of Retirees separated by termination type. This listing displays termination and benefit assignment information.

Term Date reflects the termination effective date, not the date that the action was completed.

Detailed Description:

- The report may be run based on Date Parameters -
 - i. *Terminated On or After* – The report will pick up Retirees for whom the termination effective date falls on or after the date specified.
 - ii. *Terminated On or Before* – The report will pick up Retirees for whom the termination effective date falls on or before the date specified.

Using these criteria, you may narrow the results to show only Retirees for whom records were terminated within a specified date range.

- This report also includes several settings that may alter the amount, type or format of information:
 - a. Using the Retiree Identifier selection, you may alter the identifying value to use "Social Security Number" or "Participant ID." Each of these values is pulled from corresponding value used when entering the Retiree record.
 - b. You may choose to Show PQB Address, or omit that information from the results.
 - c. You may choose to Show Benefit Details, or omit that information from the results.
 - d. Include Manually Terminated PQBs may be set to "Yes" if you wish to include Retirees whose records were manually terminated by the administrator (through the "Actions" tab of the Retiree record).
 - e. You may select "Yes" to Group by Department if you would like your report results to be further sorted by department assignment (sub-heading).
 - f. Show Latest Termination per Retiree Only is used to ensure that a record, which may have been terminated, then reinstated, only to be re-terminated several days or weeks later, will not show multiple times on the report. By setting this option to "Yes," the report will only display a Retiree record based off of the latest termination date listed on the record.

Functions to note in this report:

- a. It is important to note that the "Retiree Auto Termination" notation may be found in the individual PQB record "History Tab."

Note that the "effective" date (far left column) from the Retiree "History" tab is that which is reflected on the report. A Retiree may have, in their lifetime, been terminated and reinstated one or more times, resulting in several notations of this type in history. If you would like to see only the most recent termination of a Retiree record on this report, it is suggested to utilize the option "Show latest termination per Retiree only."

- b. This report will show any termination that was made on a Retiree record - appearance on this report only states that a Retiree has been, at one point, terminated with an effective date within the date parameters. This does not always mean that the current Retiree account status is "Terminated," as the Retiree may have been reinstated since the reflected termination was processed.