Ascensus Health & Benefits Companies

CHARDSNYDER Benefit Solutions BPC HR SIMPLIFIED nyhart UnifyHR

COBRA & Billing Services Employer Portal Guide

v1.3

Table of Contents

Introduction

Welcome! We're pleased to have the opportunity to be of service to you and your organization.

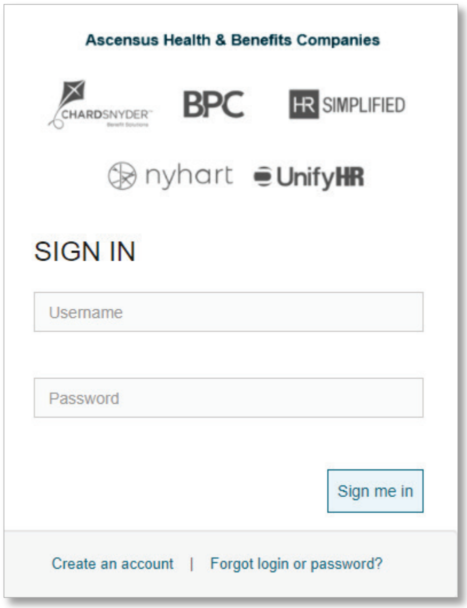
We created this guide to help you move around the COBRA and Billing Services employer portal and make the most of your online account.

> **A FEW NOTES ABOUT THIS GUIDE**
> This guide covers COBRA and Billing Services. Most of the processes covered in this guide are the same for both services, while the actions are specific to each product. You can learn more about actions in the Actions Available section later in this document.
>
> The screenshots used in this guide may reflect one or both services. If you have just COBRA services with us, you will not see some of the Billing Services items reflected in this guide when you log in to your portal. The reverse is also true – if you have just Billing Services with us, you will not see some of the COBRA items reflected in this guide when you log into your portal.
>
> We use the terms "employee" and "participant" throughout this guide. The terms can often be used interchangeably, but we typically refer to individuals on COBRA or retirees as "participants" since these individuals are not active employees. When referring to the portal used by these individuals, the Employee Portal and the Participant Portal are indeed the same portal.

If you find you still have questions, we're happy to help! Your client service team is available to assist you with any questions or support you may need.

Login

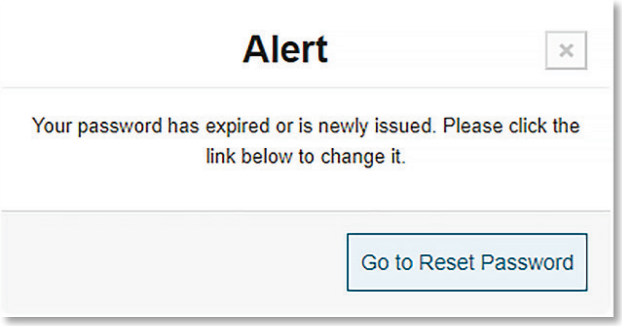
You can access your online account by visiting app.unifyhr.com.



First Time Login

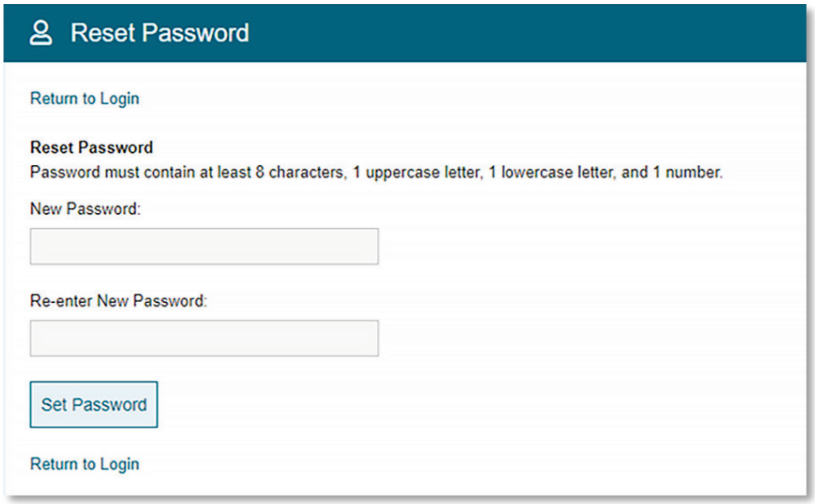
You will receive a temporary password as part of the setup process. When you visit the site for the first time, log in using your email address as your username and the temporary password.

When you log in using a temporary password you are required to set a new password by clicking Go to Reset Password.



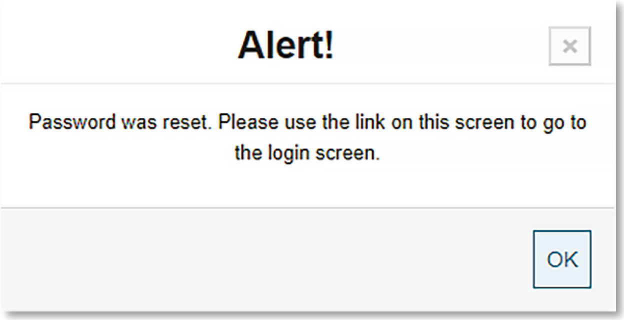
Your password has expired or is newly issued. Please click the link below to change it.

Enter your new password in the password fields and click Set Password.



Password must contain at least 8 characters, 1 uppercase letter, 1 lowercase letter, and 1 number.

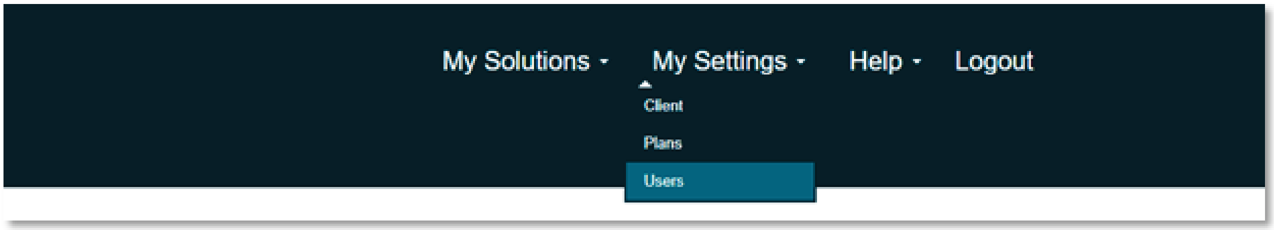
Click OK to acknowledge the password change and then click Return to Login to log in using your username and new password.



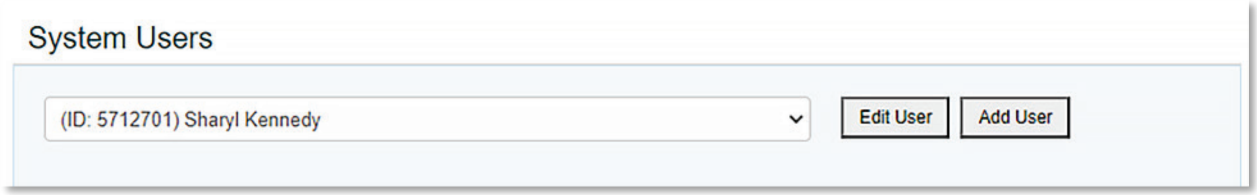
Password was reset. Please use the link on this screen to go to the login screen.

Changing Your Password

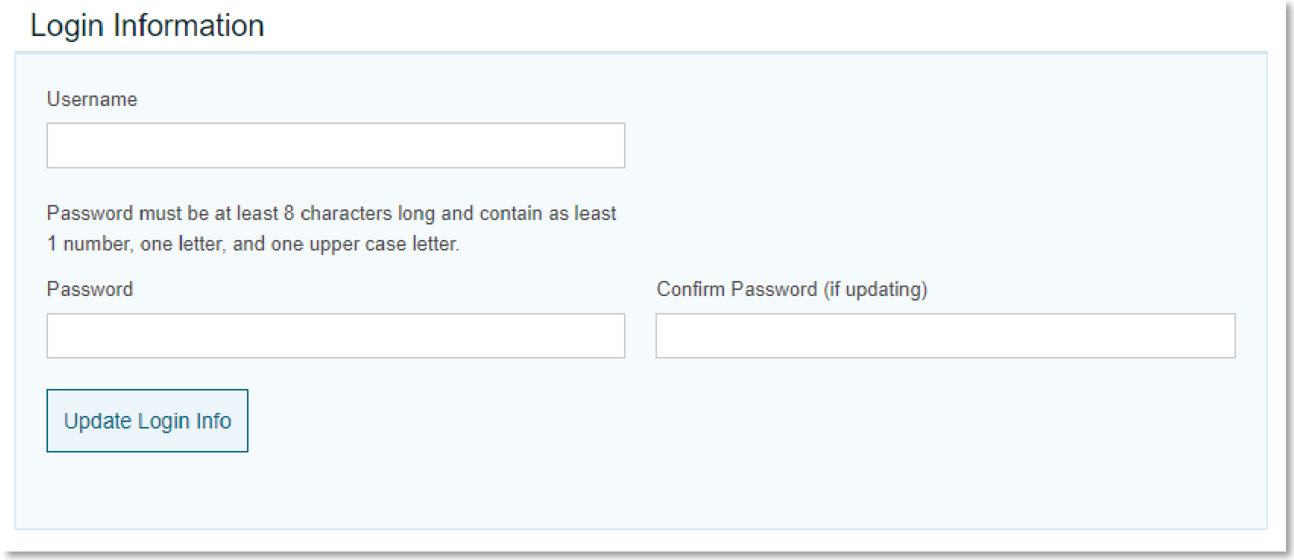
As an active portal user, you can change your password whenever necessary. To reset your password, click on My Settings in the top menu and choose Users from the drop-down list.



Use the System Users drop-down list to select your name and then click Edit User.



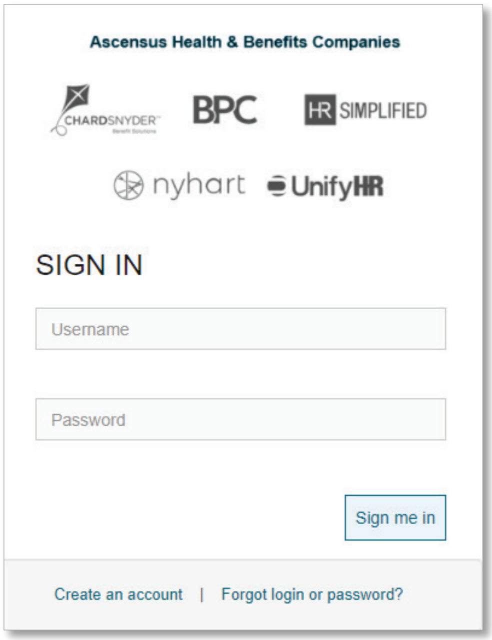
In the Login Information section, use the password fields to update your password and then click Update Login Info.



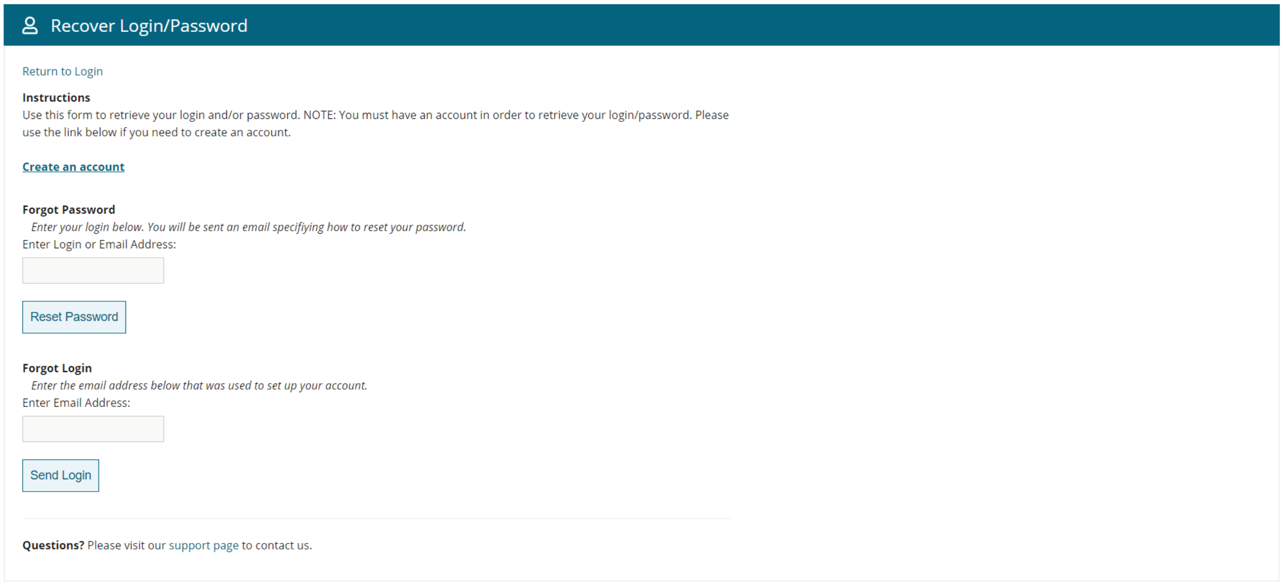
Password must be at least 8 characters long and contain as least 1 number, one letter, and one upper case letter.

Forgot Password

If you forget your password, you can reset it by clicking the Forgot login or password? link in the login window.



Enter your email in the Forgot Password section of the Recover Login/Password page and click Reset Password. You will receive an email with a link to reset your password following the process described above.



Instructions

Use this form to retrieve your login and/or password. NOTE: You must have an account in order to retrieve your login/password. Please use the link below if you need to create an account.

Forgot Password

Enter your login below. You will be sent an email specifiying how to reset your password.

Enter Login or Email Address:

Forgot Login

Enter the email address below that was used to set up your account.

Enter Email Address:

Questions? Please visit our support page to contact us.

Employer Portal Homepage

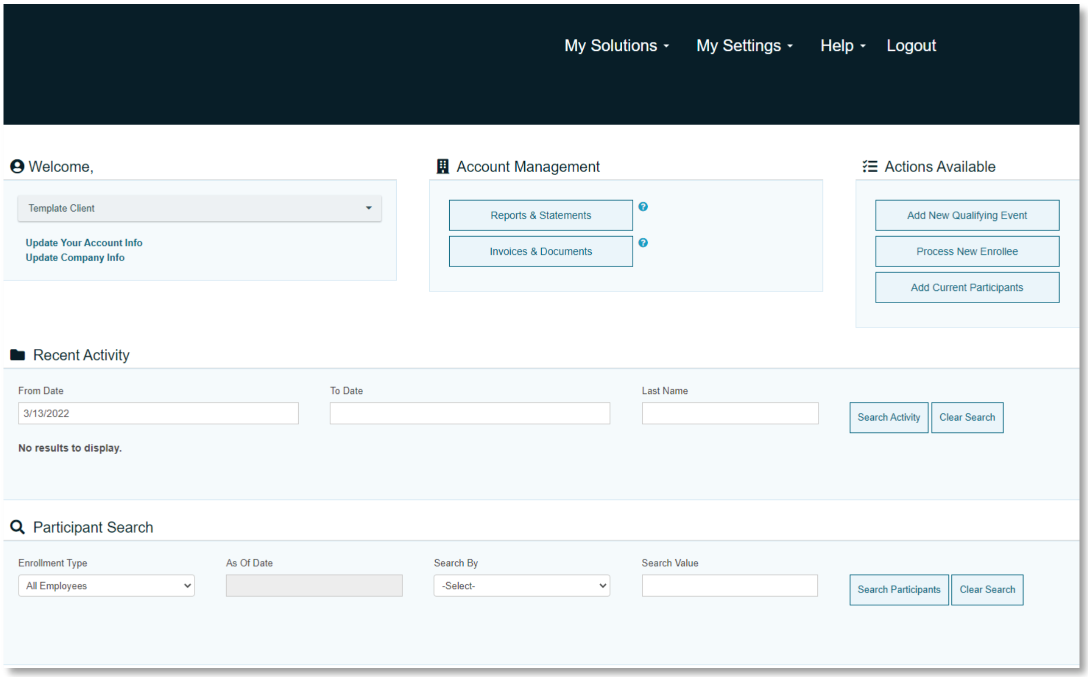
You can also learn about the employer portal by watching our Employer Portal Overview video.

The first page you see when logging in is the COBRA and Billing Services "essentials" portal homepage.

We call this section of our website the essentials portal because it contains the core elements you need to manage your COBRA and Billing Services programs. You can access additional information by choosing Full Site under My Solutions in the menu at the top of the homepage. See the Full Site section later in this document for more information.

This page gives you quick and easy access to the most common tasks and information:

- Your account and company info
- Reports and statements
- Invoices and documents
- Actions, including entering new qualifying events and new plan enrollees
- Recent activity
- Participant information



Template Client

From Date: 3/13/2022
To Date:
Last Name:

No results to display.

Enrollment Type: All Employees
As Of Date:
Search By: -Select-
Search Value:

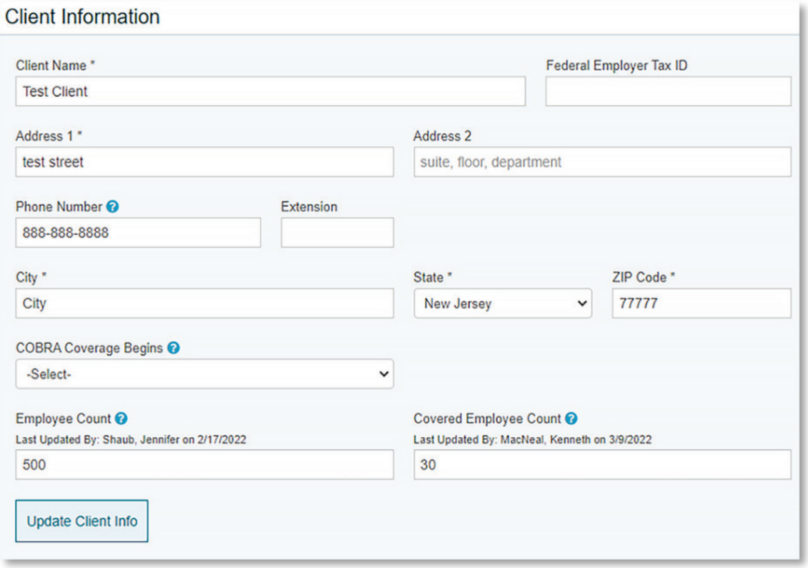
My Settings

Choosing My Settings from the navigation menu at the top gives you access to your client information, plans, and users.

Client Information

The Client Information section contains demographic information for your company, as well as employee count information and a global setting that controls when COBRA coverage begins for your COBRA participants.

You can update the information in this section whenever necessary.



Client Information

Client Name *
Test Client

Federal Employer Tax ID

Address 1 *
test street

Address 2
suite, floor, department

Phone Number ❓
888-888-8888

Extension

City *
City

State *
New Jersey

ZIP Code *
77777

COBRA Coverage Begins ❓
-Select-

Employee Count ❓
Last Updated By: Shaub, Jennifer on 2/17/2022
500

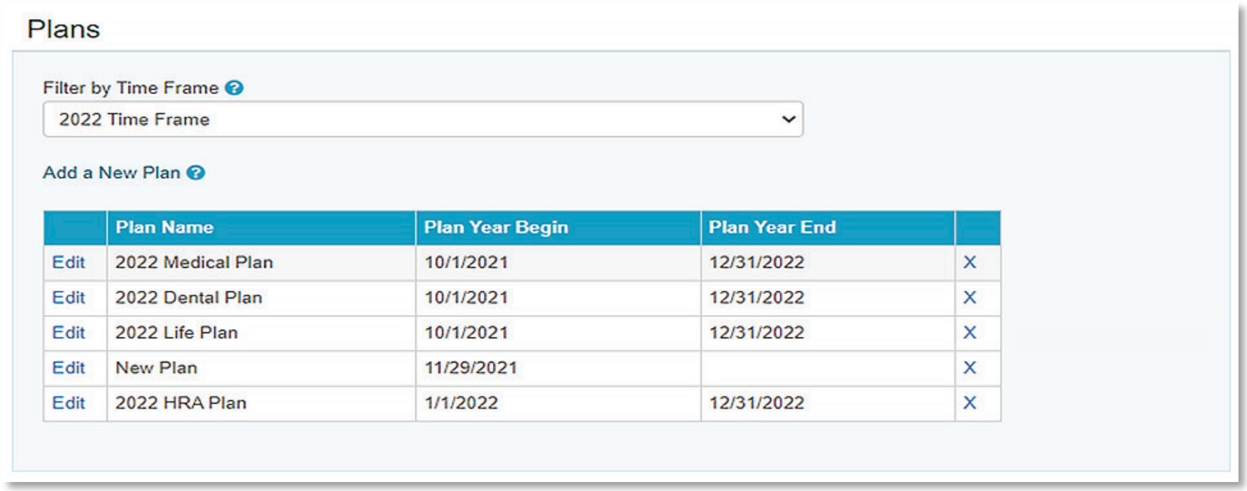
Covered Employee Count ❓
Last Updated By: MacNeal, Kenneth on 3/9/2022
30

Tip: Some field names throughout the portal include a ❓ symbol. You can find additional information about that field by clicking on the symbol.

Plans

The Plans section gives you access to the plans associated with your account. To view your plans, choose the applicable time frame from the drop-down list.

Click the Edit link to update plan information like the plan name and rates.



Plans

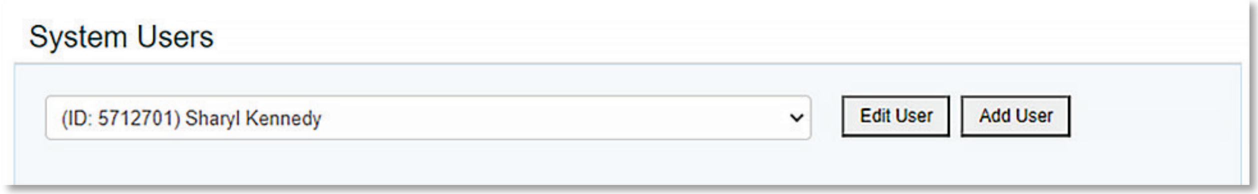
Filter by Time Frame ❓
2022 Time Frame

	Plan Name	Plan Year Begin	Plan Year End	
Edit	2022 Medical Plan	10/1/2021	12/31/2022	X
Edit	2022 Dental Plan	10/1/2021	12/31/2022	X
Edit	2022 Life Plan	10/1/2021	12/31/2022	X
Edit	New Plan	11/29/2021		X
Edit	2022 HRA Plan	1/1/2022	12/31/2022	X

Users

The Users section lets you view and edit the accounts for your team members who have access to the portal.

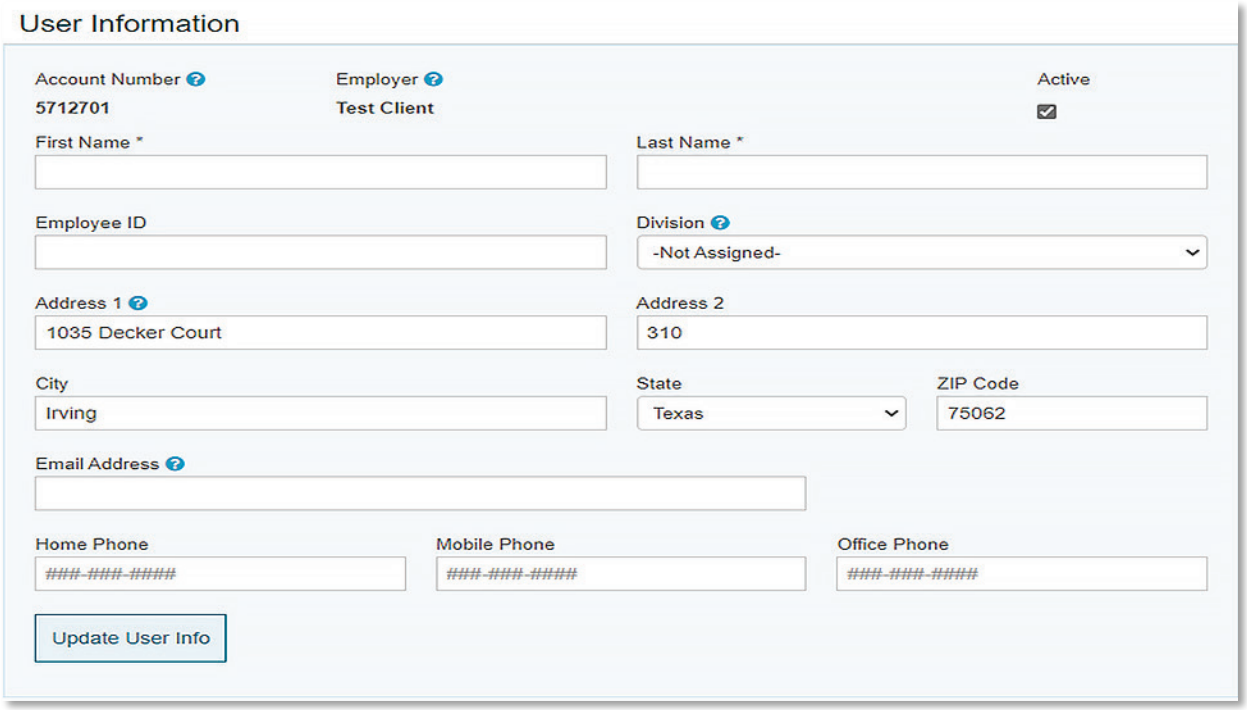
To access a user's account details, choose the appropriate user from the System Users drop-down list:



System Users

(ID: 5712701) Sharyl Kennedy

The User Information section contains contact details for each user.

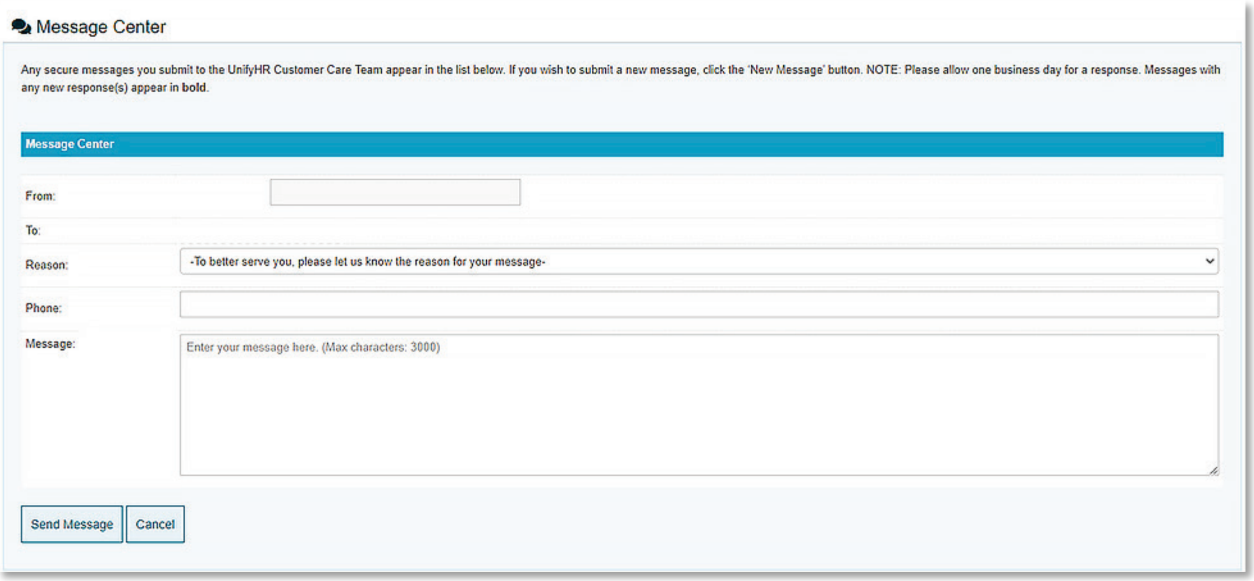


User Information

Account Number: 5712701
Employer: Test Client
Active: ☑
First Name *:
Last Name *:
Employee ID:
Division: -Not Assigned-
Address 1: 1035 Decker Court
Address 2: 310
City: Irving
State: Texas
ZIP Code: 75062
Email Address:
Home Phone: ###-###-####
Mobile Phone: ###-###-####
Office Phone: ###-###-####

Help

Choosing Help from the top menu takes you to your secure Message Center. You can send secure messages directly to your client service team by clicking New Message. You'll receive an email to your email address on file letting you know when a response is available in the secure Message Center.


Message Center

Any secure messages you submit to the UnifyHR Customer Care Team appear in the list below. If you wish to submit a new message, click the 'New Message' button. NOTE: Please allow one business day for a response. Messages with any new response(s) appear in **bold**.

Message Center

From:

To:

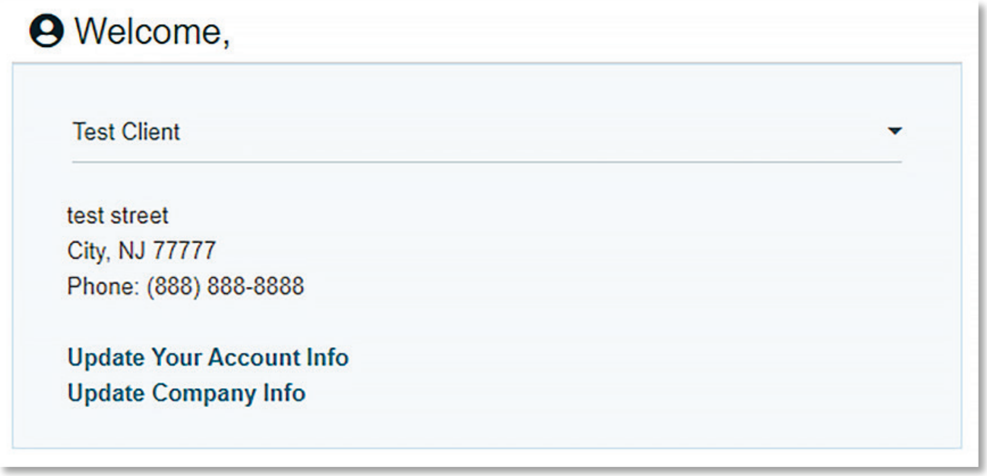
Reason: -To better serve you, please let us know the reason for your message-

Phone:

Message: Enter your message here. (Max characters: 3000)

Welcome

The Welcome section displays your company name and address for quick verification that you're accessing the correct account. This section also contains links to your personal account information and company information.

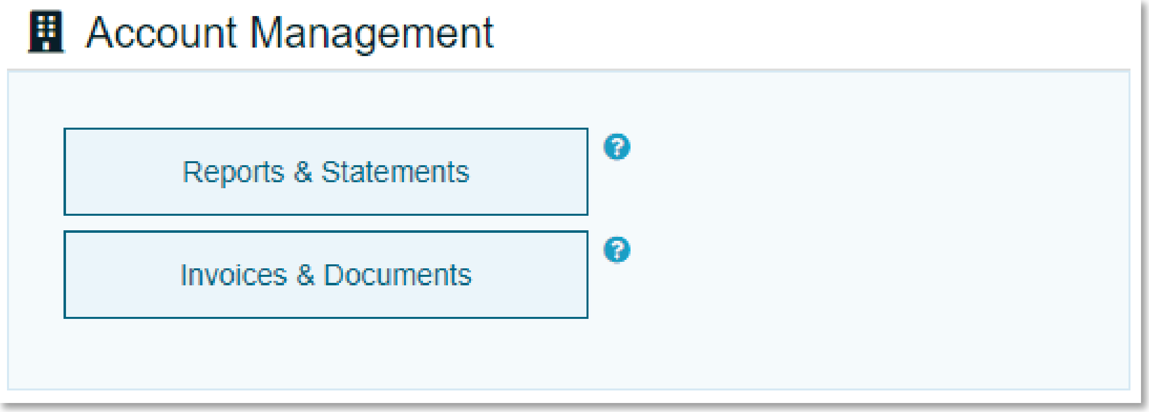

Welcome,

Test Client

test street
City, NJ 77777
Phone: (888) 888-8888

Account Management

The Account Management section gives you access to reports, statements, invoices, and documents.



Reports & Statements

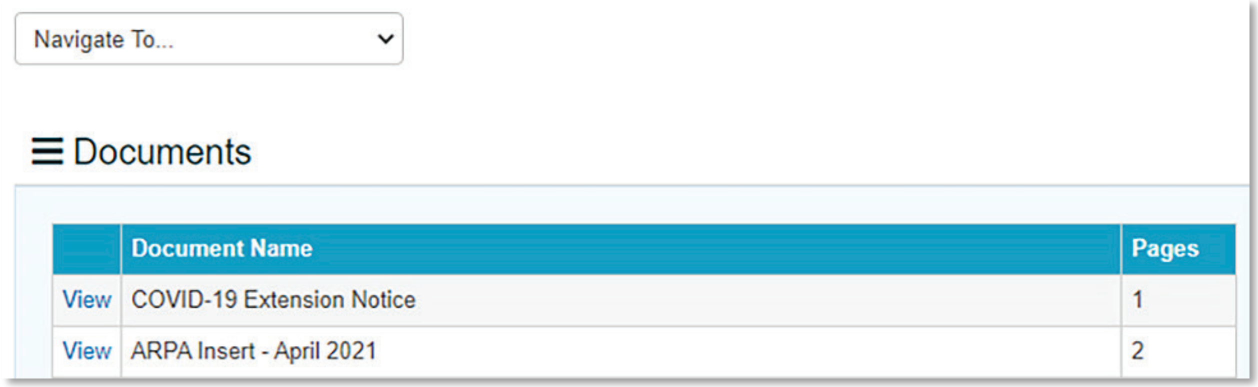
Click Reports & Statements to access the report catalog. This catalog includes all the standard reports available to you. To access a report, click on the report name in the catalog, enter the parameters for the report (if any), and then click Run Report.

To access historical reports, choose Report History from the Navigate To… drop-down list.

Invoices & Documents

The Invoices & Documents section allows you to access invoices for our services and any documents attached to your account. Typically, the documents you'll find in this section are documents that you provide for viewing by your participant via the participant portal.

Click View to see the contents of an invoice or document.



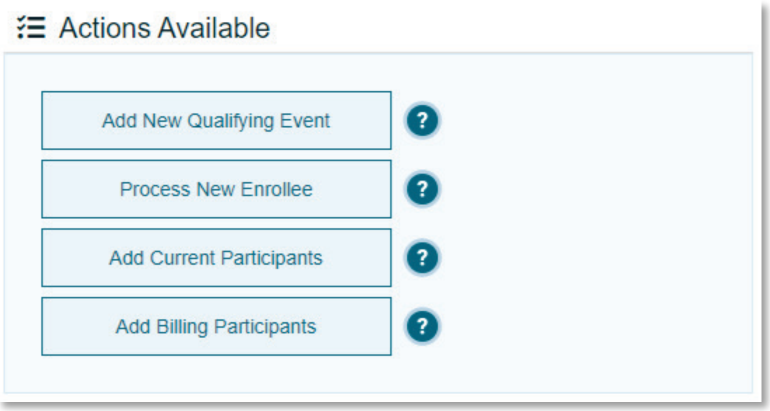
	Document Name	Pages
View	COVID-19 Extension Notice	1
View	ARPA Insert - April 2021	2

Actions Available

From the Actions Available section, you can:

- Add a new qualifying event to let us know when qualifying events happen so we can send election notices.
- Process a new enrollee to let us know about newly covered individuals so we can send the COBRA General Notice.
- Add current participants to let us know about anyone who is currently on COBRA when we first start administering COBRA for your company.
- Add Billing participants to let us know about retirees, employees on a leave, or anyone else who isn't a COBRA participant and who you need us to bill for their share of premiums.

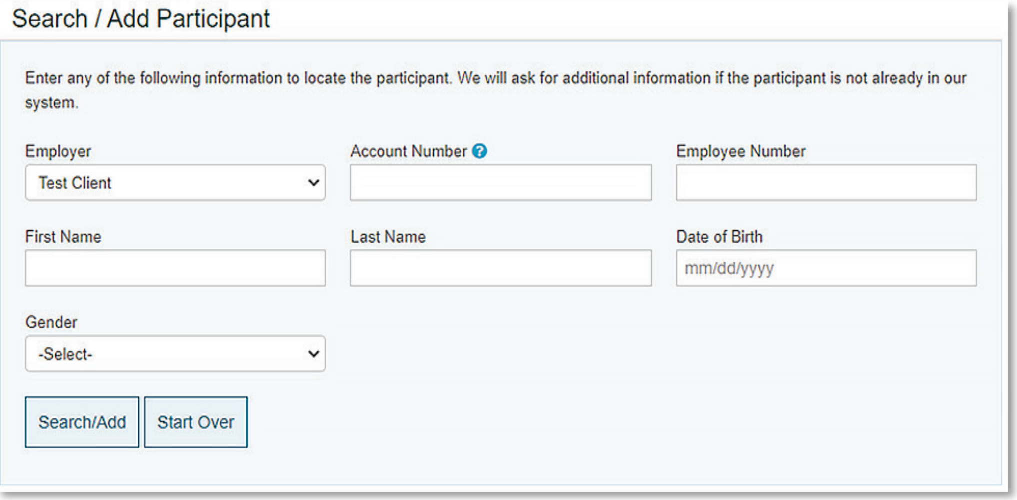
Click the ? next to each button to launch a step-by-step guide to performing the action.



Add New Qualifying Event (applies only to COBRA)

Prefer video instead? Watch a video overview of how to process qualifying events.

To enter a new qualifying event, you must first perform a participant search to determine if the individual is already in the system. Enter the first name, last name, date of birth, and gender of the primary individual who experienced the qualifying event then click Search/Add.

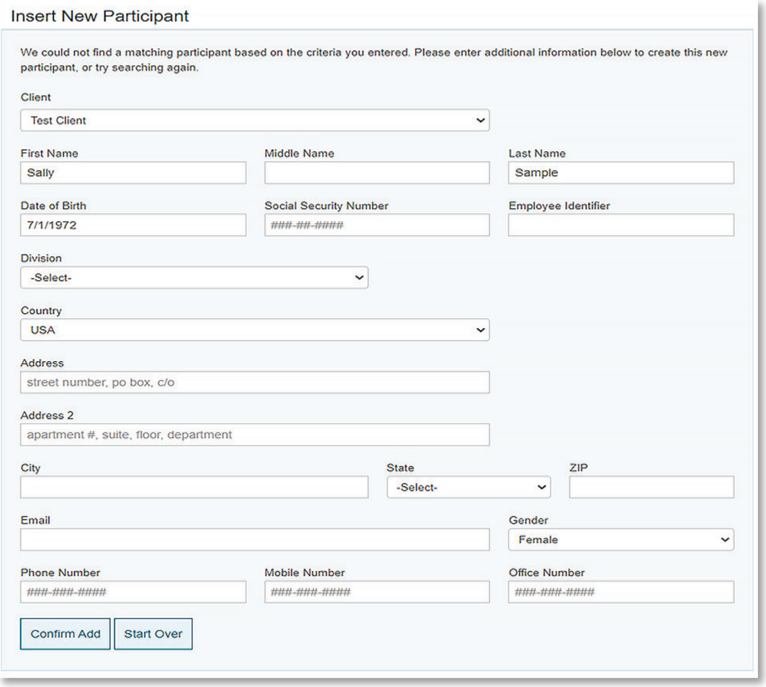


Search / Add Participant

Enter any of the following information to locate the participant. We will ask for additional information if the participant is not already in our system.

Employer: Test Client
Account Number:
Employee Number:
First Name:
Last Name:
Date of Birth: mm/dd/yyyy
Gender: -Select-

If the search returns a result, click the individual's name and complete the steps below. If the search does not return any results, you will be prompted to insert a new participant.



Insert New Participant

We could not find a matching participant based on the criteria you entered. Please enter additional information below to create this new participant, or try searching again.

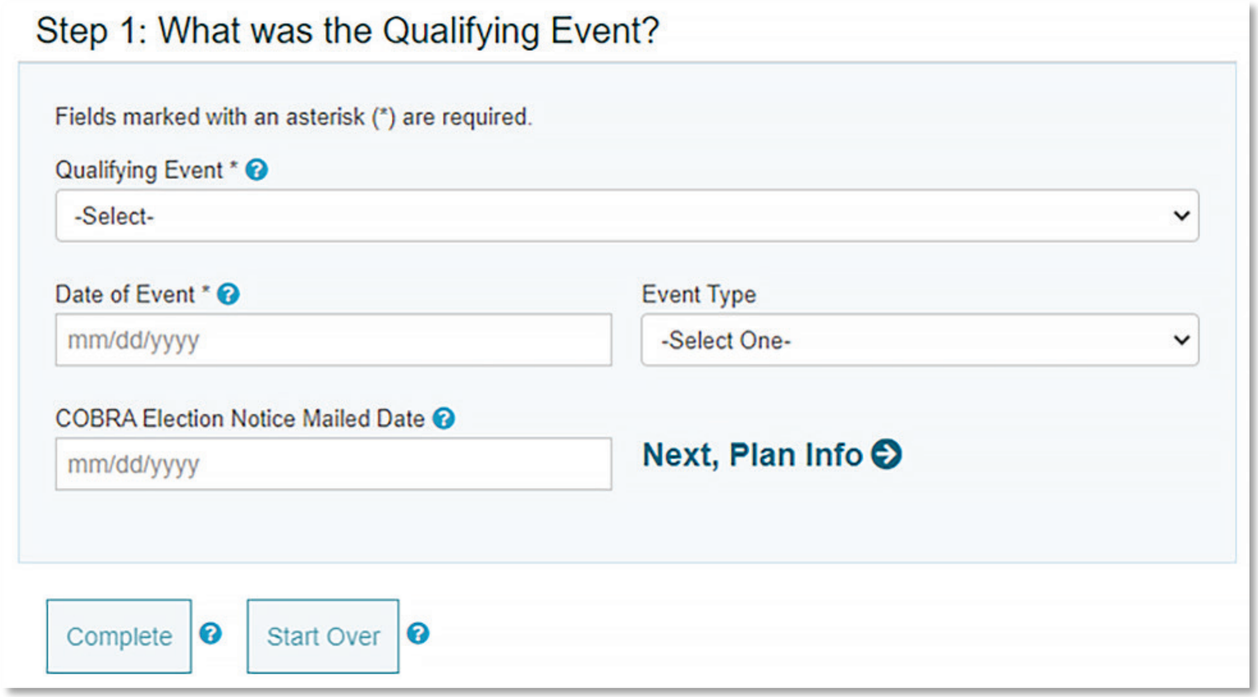
Client: Test Client
First Name: Sally
Middle Name:
Last Name: Sample
Date of Birth: 7/1/1972
Social Security Number: ###-##-####
Employee Identifier:
Division: -Select-
Country: USA
Address: street number, po box, c/o
Address 2: apartment #, suite, floor, department
City:
State: -Select-
ZIP:
Email:
Gender: Female
Phone Number: ###-###-####
Mobile Number: ###-###-####
Office Number: ###-###-####

Be sure to complete all the applicable fields then click Confirm Add to add the participant to the system and move on to the next step.

Step 1. What was the Qualifying Event?
Use the Qualifying Event drop-down list to choose the event type (e.g., termination, divorce, etc.) and then enter the date the event happened.

Use the Event Type drop-down list to tell us if the event was voluntary or involuntary.

Only complete the COBRA Election Notice Mailed Date field if your prior COBRA administrator already mailed an election notice for this qualifying event.



Step 1: What was the Qualifying Event?

Fields marked with an asterisk (*) are required.

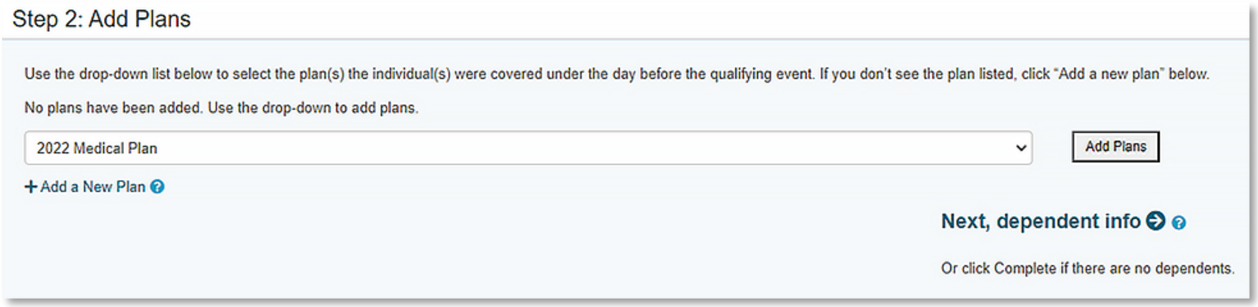
Qualifying Event * -Select-

Date of Event * mm/dd/yyyy

Event Type -Select One-

COBRA Election Notice Mailed Date mm/dd/yyyy

Step 2. Add Plans
Using the drop-down list, select each of the plans the individual(s) were covered under the day the qualifying event. After selecting a plan from the drop-down list, click Add Plan to attach the plan to the qualifying event.



Step 2: Add Plans

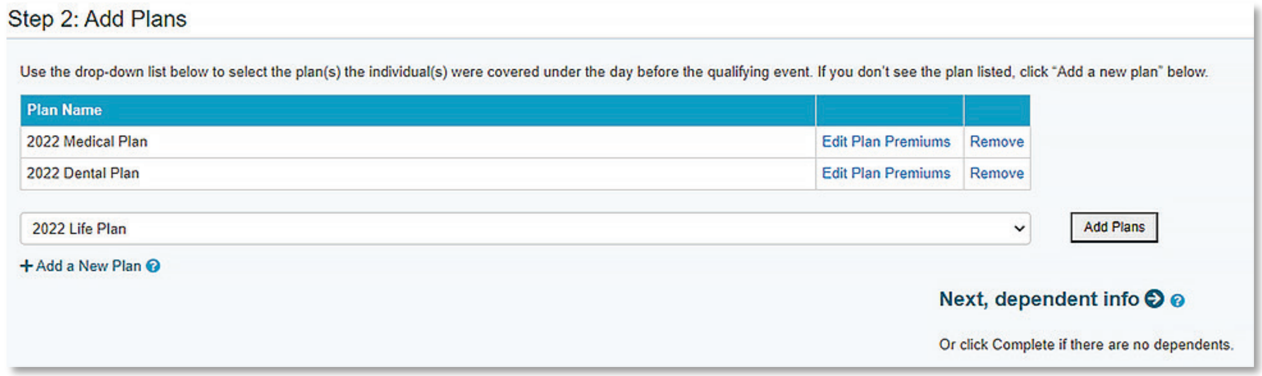
Use the drop-down list below to select the plan(s) the individual(s) were covered under the day before the qualifying event. If you don't see the plan listed, click "Add a new plan" below.

No plans have been added. Use the drop-down to add plans.

2022 Medical Plan

Or click Complete if there are no dependents.

Step 2, with plans added



Step 2: Add Plans

Use the drop-down list below to select the plan(s) the individual(s) were covered under the day before the qualifying event. If you don't see the plan listed, click "Add a new plan" below.

Plan Name		
2022 Medical Plan	Edit Plan Premiums	Remove
2022 Dental Plan	Edit Plan Premiums	Remove

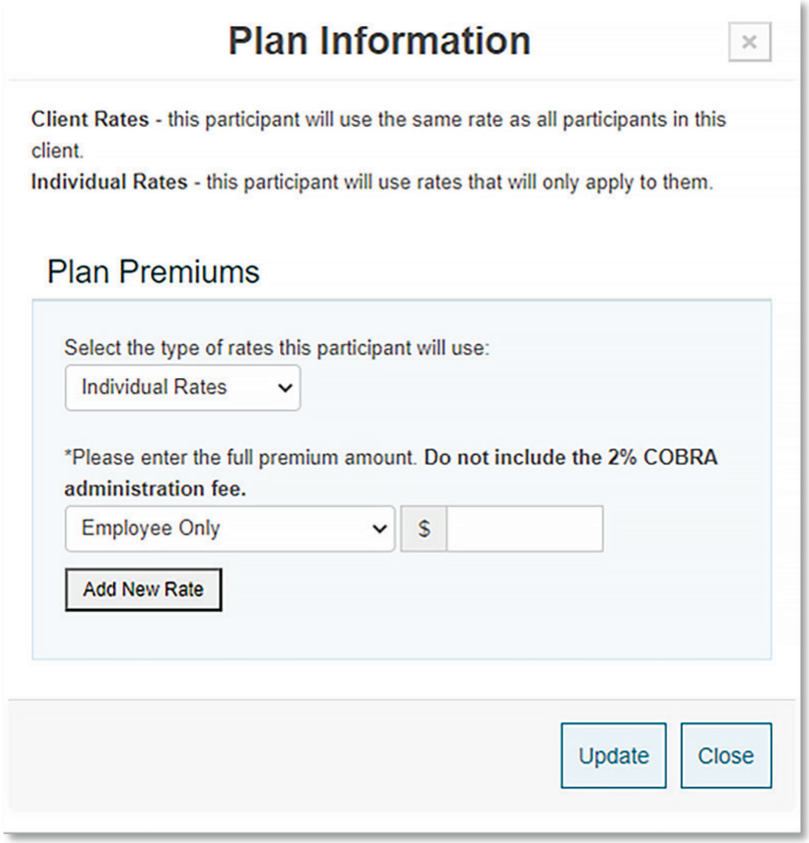
2022 Life Plan

Or click Complete if there are no dependents.

If necessary, you can edit the premiums for a plan by clicking Edit Plan Premiums. You should only edit the premiums if the rates for this individual differ from your standard COBRA premiums or if your rates change due to age (aka "age banded rates").

When editing plan premiums, use the drop-down menu to switch from Client Rates to Individual Rates. You will then choose each coverage tier that should appear on the election notice and enter the corresponding rates for each tier.

Click Update when you're done to move on to the next step.



Plan Information

Client Rates - this participant will use the same rate as all participants in this client.

Individual Rates - this participant will use rates that will only apply to them.

Plan Premiums

Select the type of rates this participant will use:

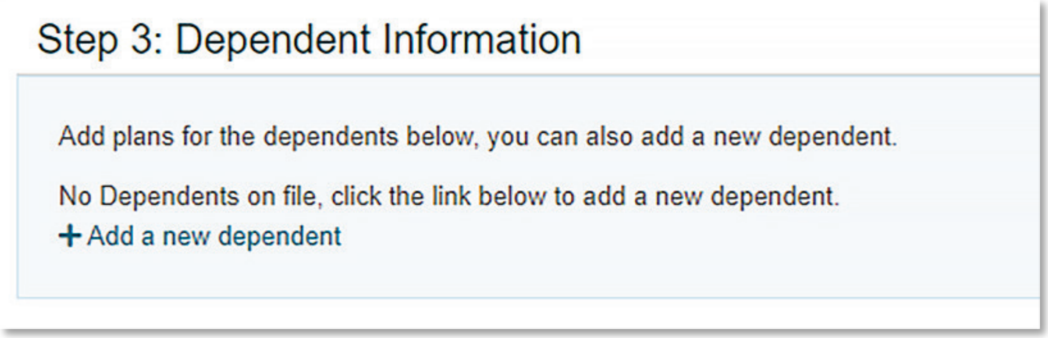
Individual Rates

*Please enter the full premium amount. **Do not include the 2% COBRA administration fee.**

Employee Only $

Step 3. Dependent Information
You will now add plans for any dependents associated with the qualifying event. If there are no dependents associated with the qualifying event, click Complete to move to the next step.

If there are dependents associated with the event that are not yet in the system, you must add them now by clicking +Add a new dependent.

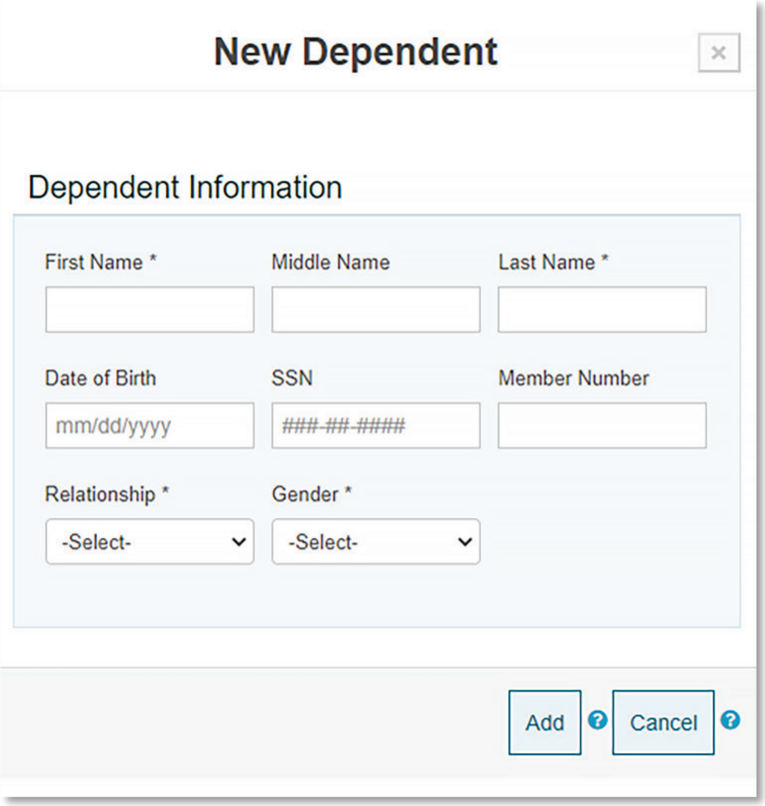


Step 3: Dependent Information

Add plans for the dependents below, you can also add a new dependent.

No Dependents on file, click the link below to add a new dependent.

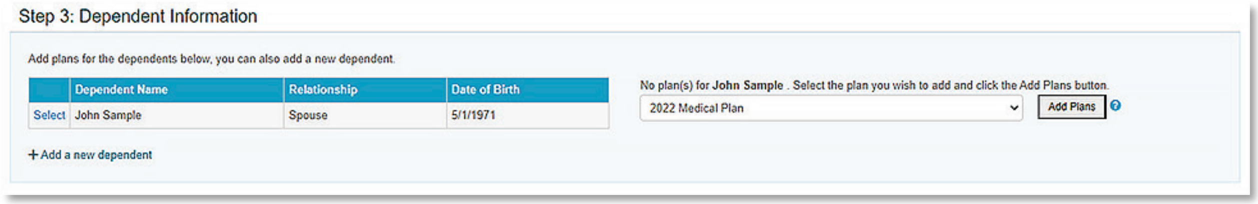
Complete the fields in the New Dependent window for each dependent you need to add and then click Add.



New Dependent

Dependent Information

You will be prompted to add plans for each dependent you enter. Click Select next to each dependent and then use the drop-down list to add their plans.



Step 3: Dependent Information

Add plans for the dependents below, you can also add a new dependent.

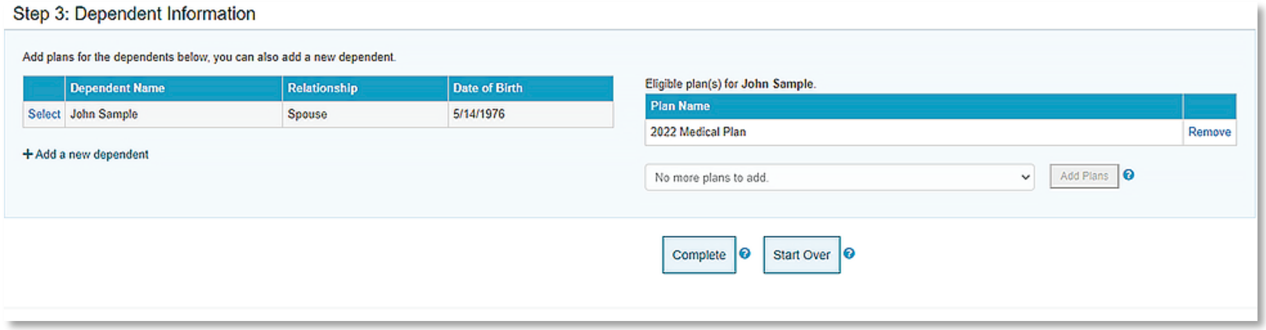
	Dependent Name	Relationship	Date of Birth
Select	John Sample	Spouse	5/1/1971

+ Add a new dependent

No plan(s) for **John Sample** . Select the plan you wish to add and click the Add Plans button.

2022 Medical Plan

Adding plans for dependents follows the same process as adding plans for the primary individual (see above for more information).



Step 3: Dependent Information

Add plans for the dependents below, you can also add a new dependent.

	Dependent Name	Relationship	Date of Birth
Select	John Sample	Spouse	5/14/1976

+ Add a new dependent

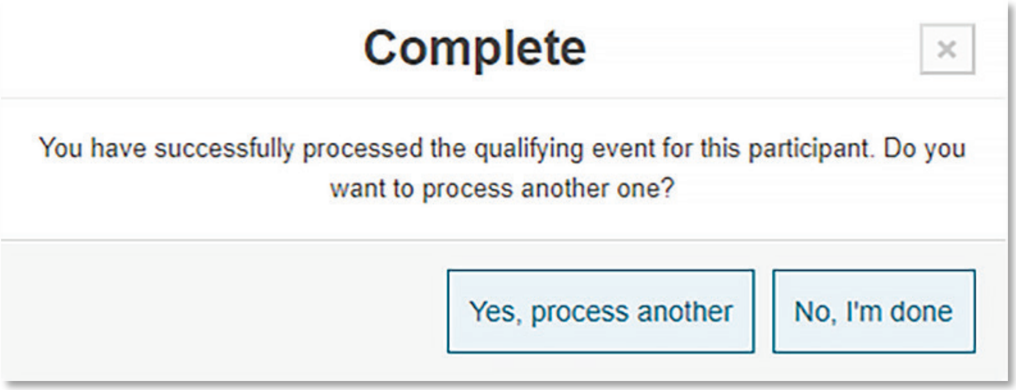
Eligible plan(s) for **John Sample**.

Plan Name	
2022 Medical Plan	Remove

No more plans to add.

When you're done adding plans for all dependents, click Complete to finish entering the qualifying event.

If you need to enter another qualifying event, click Yes, process another. If you're done entering qualifying events for now, click No, I'm done.



Complete

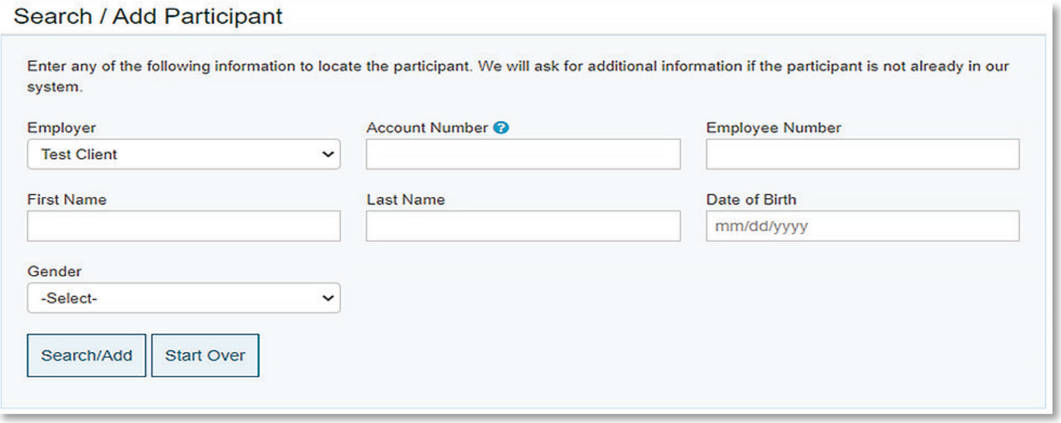
You have successfully processed the qualifying event for this participant. Do you want to process another one?

Process New Enrollee (applies only to COBRA)

Prefer video instead? Watch a video overview of how to process new enrollees.

Individuals who become covered under your plan need to receive a COBRA General Notice. You can let us know about these individuals by clicking Process New Enrollee and completing the following steps.

To process a new enrollee, you will start by searching for the participant to see if they already have a record in the system.



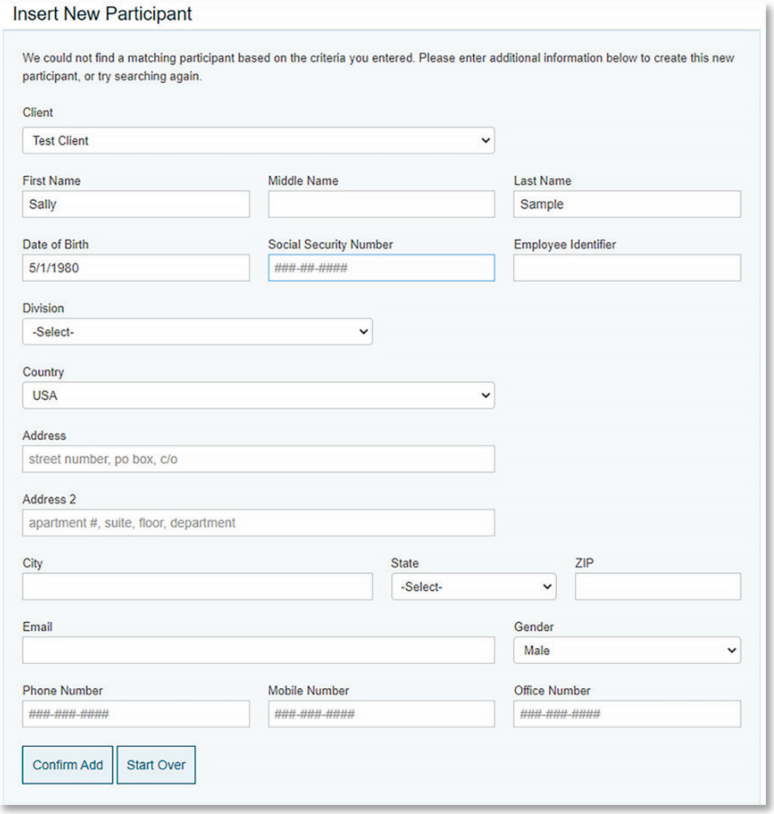
Search / Add Participant

Enter any of the following information to locate the participant. We will ask for additional information if the participant is not already in our system.

Employer: Test Client

Gender: -Select-

If the search returns a result, click the individual’s name and complete the steps below. If the search does not return any results, you will be prompted to insert a new participant.



Insert New Participant

We could not find a matching participant based on the criteria you entered. Please enter additional information below to create this new participant, or try searching again.

Client: Test Client

First Name: Sally

Last Name: Sample

Date of Birth: 5/1/1980

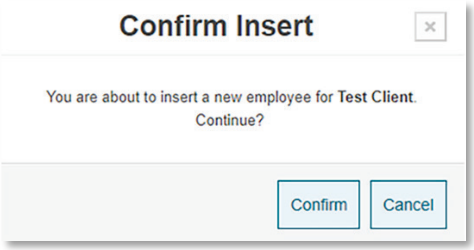
Division: -Select-

Country: USA

State: -Select-

Gender: Male

Be sure to complete all the applicable fields, then click Confirm Add to add the participant to the system and move on to Employment History.

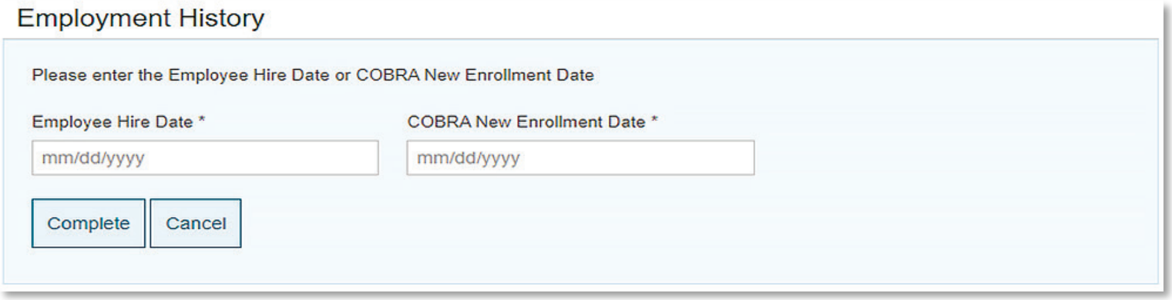


You are about to insert a new employee for **Test Client**. Continue?

Employment History

Here you will provide the employee's hire date and the COBRA New Enrollment Date for the new enrollee.

The COBRA New Enrollment Date is the date this individual first became covered under one or more of your COBRA eligible plans.



Please enter the Employee Hire Date or COBRA New Enrollment Date

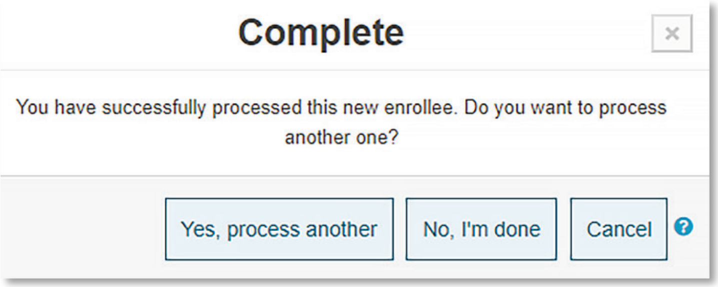
Employee Hire Date * mm/dd/yyyy

COBRA New Enrollment Date * mm/dd/yyyy

We use these dates to generate notices and communicate with your health plans. If you want us to send a COBRA General Notice to this individual, you must enter the date this individual first became covered under one or more of your COBRA-eligible plans. If you do not provide a date in COBRA New Enrollment Date field, we will not send a General Rights Notice.

When done, click Complete.

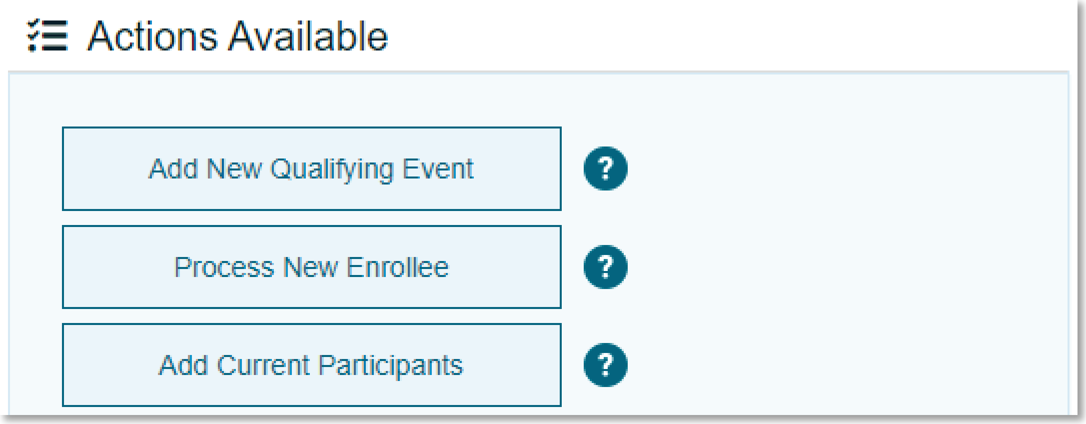
If you have more new enrollees to process, click Yes, process another. If you're done entering new enrollees for now, click No, I'm done.



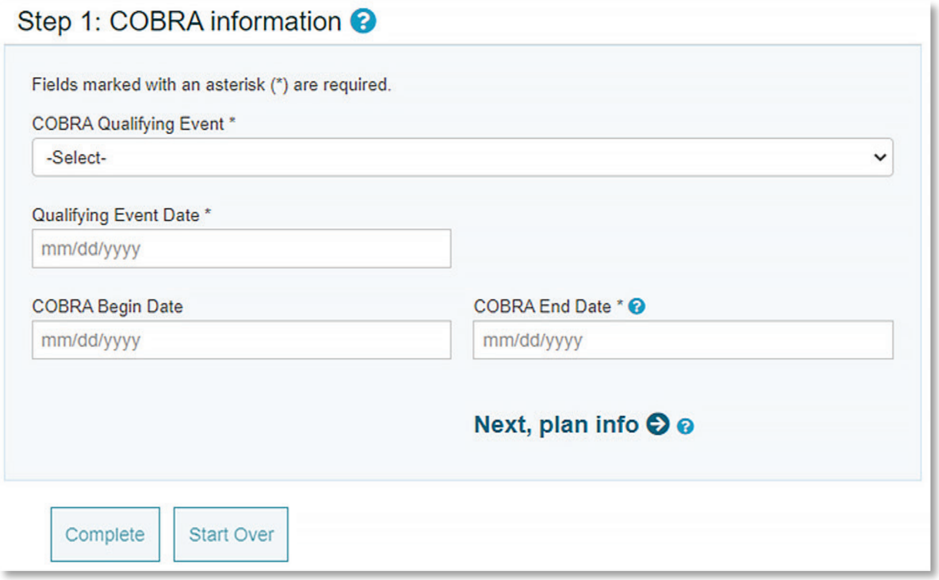
You have successfully processed this new enrollee. Do you want to process another one?

Add Current Participants (applies only to COBRA)

Adding current participants is usually only done during the onboarding process or when you acquire another organization. You complete this process to let us know of any current COBRA participants that we will handle going forward.



The process for adding current participants is very similar to the process for adding new qualifying events, but you will also be asked to provide the COBRA Begin Date and the COBRA End Date for the current participants:



Fields marked with an asterisk (*) are required.

COBRA Qualifying Event * -Select-

Qualifying Event Date * mm/dd/yyyy

COBRA Begin Date mm/dd/yyyy

COBRA End Date * mm/dd/yyyy

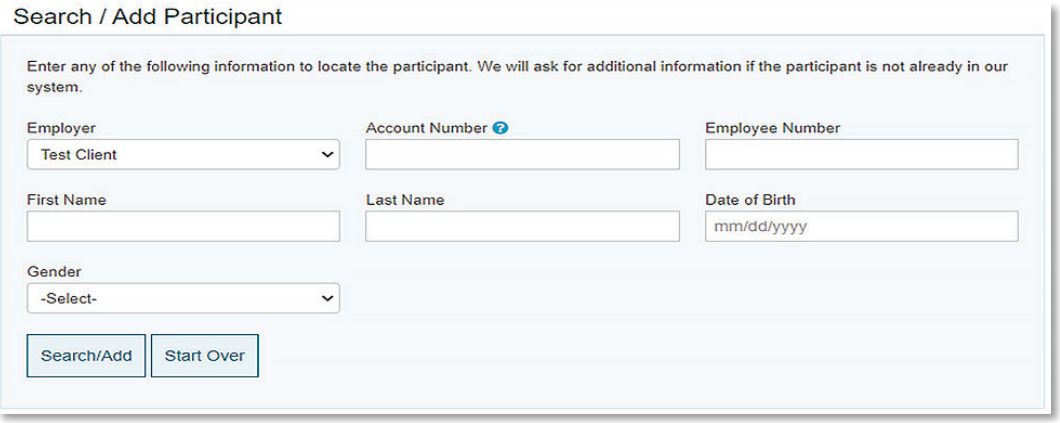
For help completing the Add Current Participants action, see the Add New Qualifying Event section above or click the ? to view step-by-step instructions.

Add Billing Participants (applies only to Billing Services)

Prefer video instead? Watch a video overview of how to add billing participants.

You can add Billing participants during the onboarding process or whenever you have a new retiree or employee on leave.

To add a new Billing participant, you must first perform a participant search to determine if the individual is already in the system. Enter the first name, last name, date of birth, and gender of the primary individual you need to add and then click Search/Add.

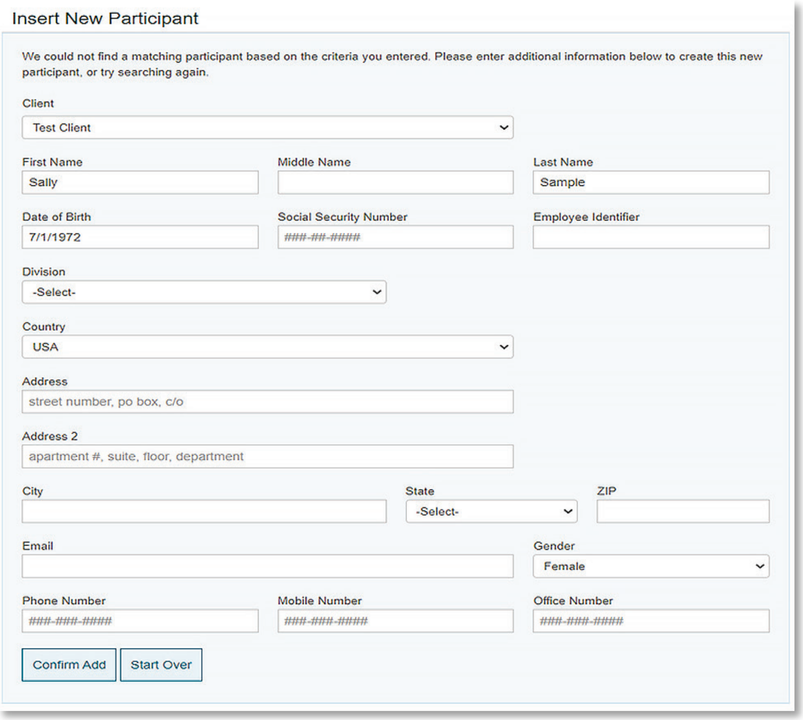


Search / Add Participant

Enter any of the following information to locate the participant. We will ask for additional information if the participant is not already in our system.

Employer: Test Client
Account Number:
Employee Number:
First Name:
Last Name:
Date of Birth: mm/dd/yyyy
Gender: -Select-

If the search returns a result, click the link next to the individual's name and complete the steps below. If the search does not return any results, you will be prompted to insert a new participant.

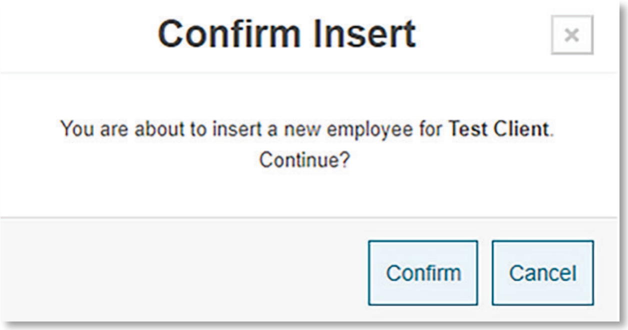


Insert New Participant

We could not find a matching participant based on the criteria you entered. Please enter additional information below to create this new participant, or try searching again.

Client: Test Client
First Name: Sally
Middle Name:
Last Name: Sample
Date of Birth: 7/1/1972
Social Security Number: ###-##-####
Employee Identifier:
Division: -Select-
Country: USA
Address: street number, po box, c/o
Address 2: apartment #, suite, floor, department
City:
State: -Select-
ZIP:
Email:
Gender: Female
Phone Number: ###-###-####
Mobile Number: ###-###-####
Office Number: ###-###-####

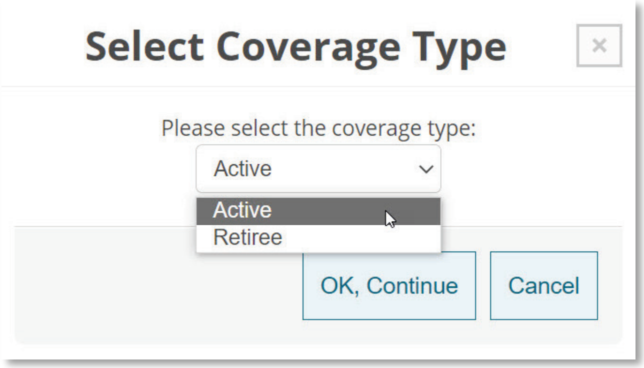
Be sure to complete all the applicable fields then click Confirm Add to add the participant to the system and move on to the next step.



Confirm Insert

You are about to insert a new employee for **Test Client**.
Continue?

With your new Billing participant added, it is time to choose the participant's coverage type (e.g., active, retiree, etc.) from the Select Coverage Type pop-up window:



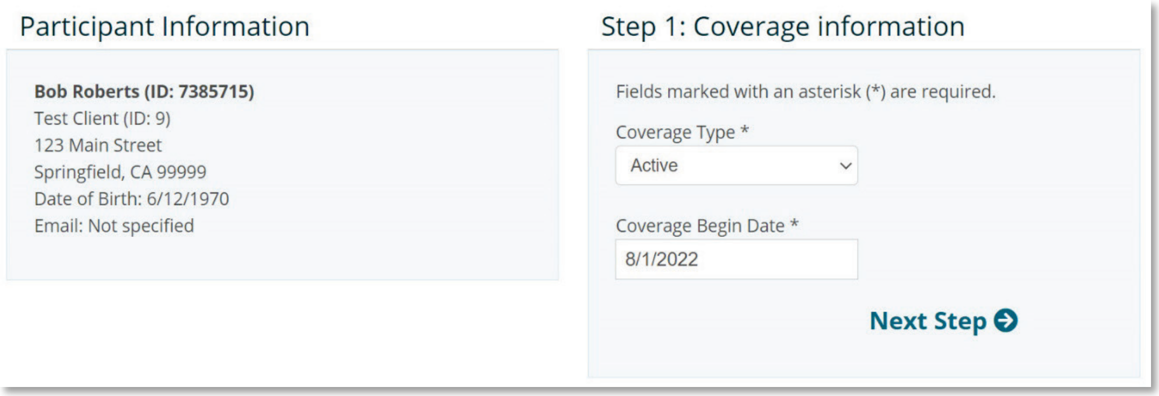
Select Coverage Type

Please select the coverage type:

Active

- If your Billing program includes a single coverage type, simply click OK, Continue.
- If your Billing program includes multiple coverage types, use the drop-down list to select the correct option for this participant and then clock OK, Continue.

You must now enter the Coverage Begin Date and then click Next Step to enter plan information for this participant.



Participant Information

Bob Roberts (ID: 7385715)
Test Client (ID: 9)
123 Main Street
Springfield, CA 99999
Date of Birth: 6/12/1970
Email: Not specified

Step 1: Coverage information

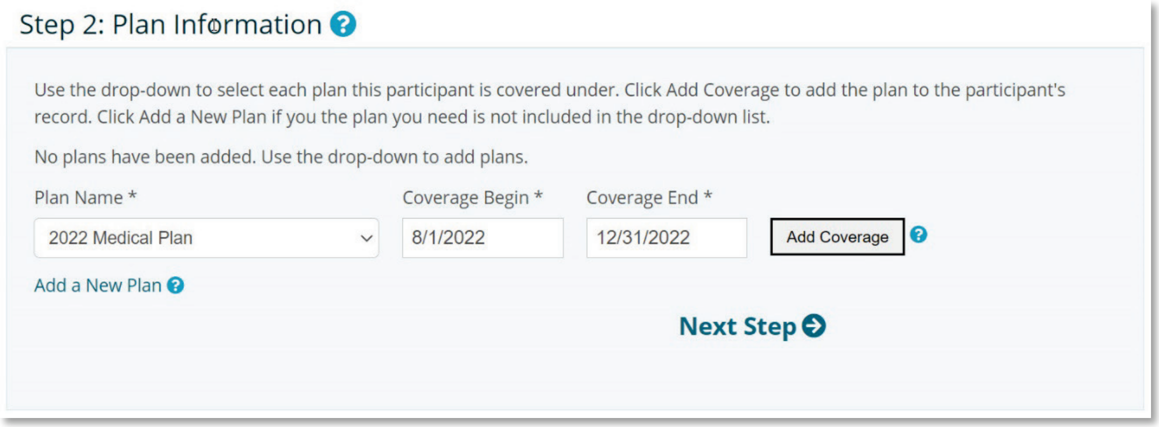
Fields marked with an asterisk (*) are required.

Coverage Type *: Active

Coverage Begin Date *: 8/1/2022

Step 2. Add Plans

Using the drop-down list, select each of the plans the Billing participant is covered under. After selecting a plan from the drop-down list, click Add Plan to attach the plan to the participant.



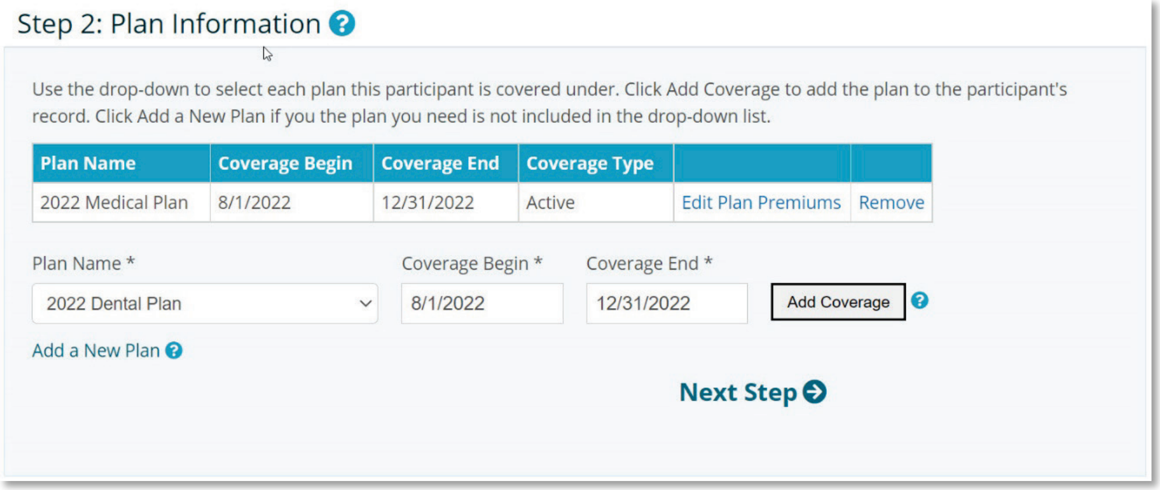
Step 2: Plan Information

Use the drop-down to select each plan this participant is covered under. Click Add Coverage to add the plan to the participant's record. Click Add a New Plan if you the plan you need is not included in the drop-down list.

No plans have been added. Use the drop-down to add plans.

Plan Name *: 2022 Medical Plan
Coverage Begin *: 8/1/2022
Coverage End *: 12/31/2022

After adding all of the plans for this participant, click Next Step to move on to adding dependents.



Step 2: Plan Information

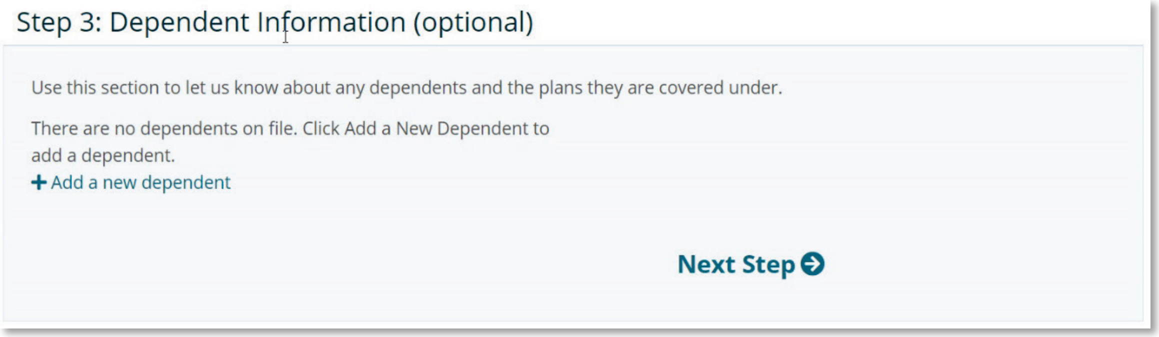
Use the drop-down to select each plan this participant is covered under. Click Add Coverage to add the plan to the participant's record. Click Add a New Plan if you the plan you need is not included in the drop-down list.

Plan Name	Coverage Begin	Coverage End	Coverage Type		
2022 Medical Plan	8/1/2022	12/31/2022	Active	Edit Plan Premiums	Remove

Plan Name *: 2022 Dental Plan
Coverage Begin *: 8/1/2022
Coverage End *: 12/31/2022

Step 3. Dependent Information

You will now add any dependents associated with the primary Billing participants.



Step 3: Dependent Information (optional)

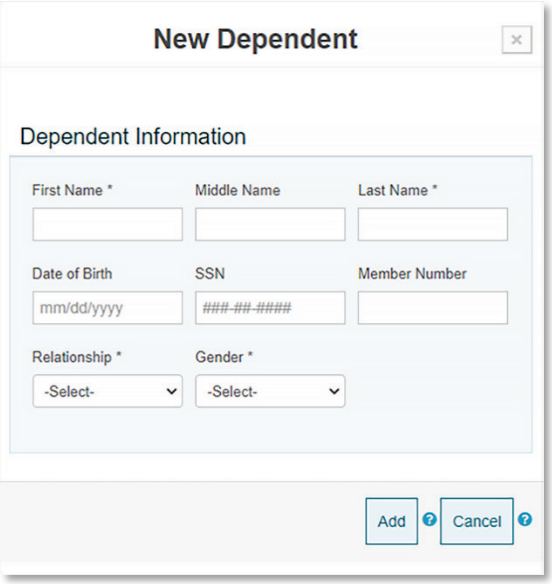
Use this section to let us know about any dependents and the plans they are covered under.

There are no dependents on file. Click Add a New Dependent to add a dependent.

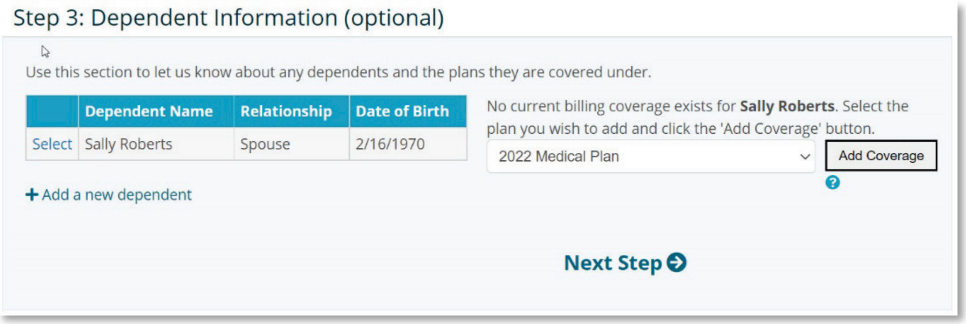
If there are no dependents associated with the participants, click Next Step to continue.

If there are dependents associated with the participants that are not yet in the system, you must add them now by clicking +Add a new dependent.

Complete the fields in the New Dependent window for each dependent you need to add and then click Add.



You will be prompted to add plans for each dependent you enter. Click Select next to each dependent and then use the drop-down list to add their plans.



Step 3: Dependent Information (optional)

Use this section to let us know about any dependents and the plans they are covered under.

	Dependent Name	Relationship	Date of Birth
Select	Sally Roberts	Spouse	2/16/1970

No current billing coverage exists for **Sally Roberts**. Select the plan you wish to add and click the 'Add Coverage' button.

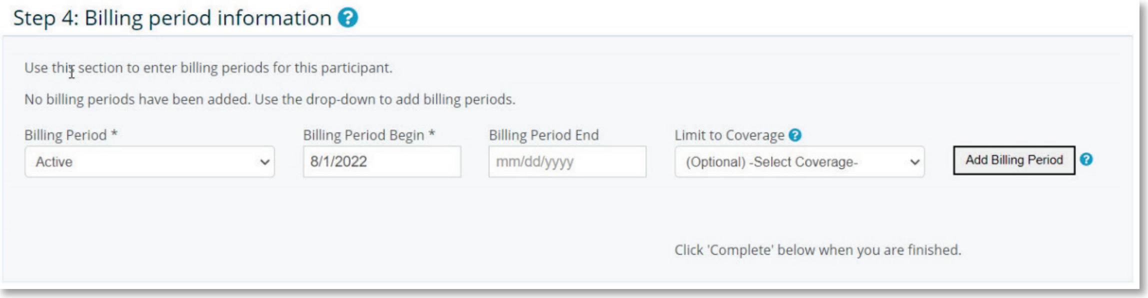
2022 Medical Plan

Be sure to add each plan that each dependent is covered under.

When you're done entering dependents and their plans, click Next Step to move on to adding the billing period information for the participant and dependents.

Step 4. Billing Period Information
You use the Billing Period Information section to let us know when to begin and end billing the participant for coverage.

The billing period begin date will default to the coverage begin date you entered earlier in this process. If the billing period begin date should be different, update the date in this field to reflect the correct date.



Step 4: Billing period information

Use this section to enter billing periods for this participant.

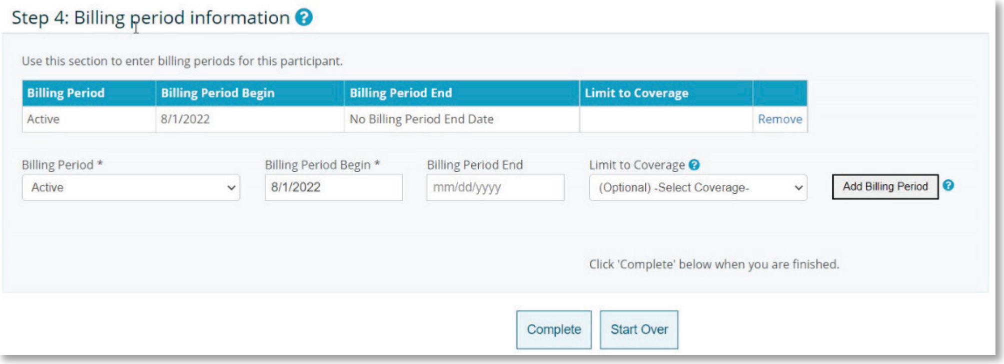
No billing periods have been added. Use the drop-down to add billing periods.

Billing Period * Active
Billing Period Begin * 8/1/2022
Billing Period End mm/dd/yyyy
Limit to Coverage (Optional) -Select Coverage-

Click 'Complete' below when you are finished.

If we should cease billing this participant and their dependents by a particular date, enter the date in the Billing Period End field. If the billing period should remain open ended, leave this field empty.

When done entering the billing period information, click Add Billing Period. You will now see the billing period attached to the participant.



Step 4: Billing period information

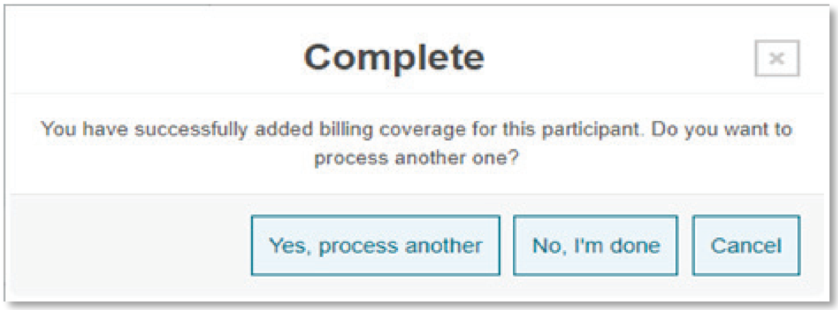
Use this section to enter billing periods for this participant.

Billing Period	Billing Period Begin	Billing Period End	Limit to Coverage	
Active	8/1/2022	No Billing Period End Date		Remove

Billing Period * Active
Billing Period Begin * 8/1/2022
Billing Period End mm/dd/yyyy
Limit to Coverage (Optional) -Select Coverage-

Click 'Complete' below when you are finished.

Click Complete to finish the process. You will receive an onscreen confirmation message and be prompted to your next action. If you need to add another billing participant, click Yes, process another. If you're done adding billing participants, click No, I'm done. If you need to cancel the process and start over, click Cancel.



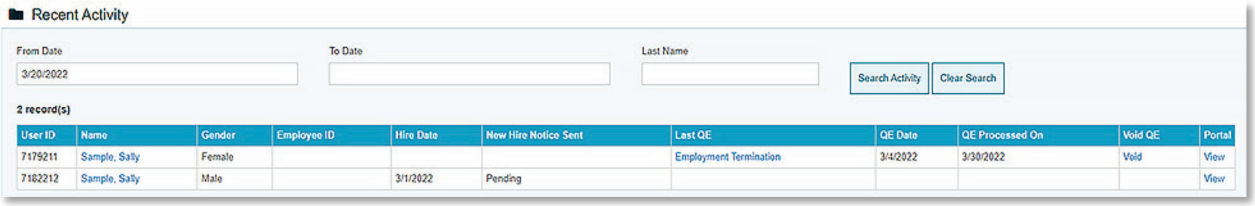
Complete

You have successfully added billing coverage for this participant. Do you want to process another one?

Recent Activity

The Recent Activity section gives you access to recent account activity.

By default, the From Date is set to ten days in the past, but you can search a different timeframe by updating the date displayed in this field. Activity occurring in your chosen timeframe will appear in the table below.



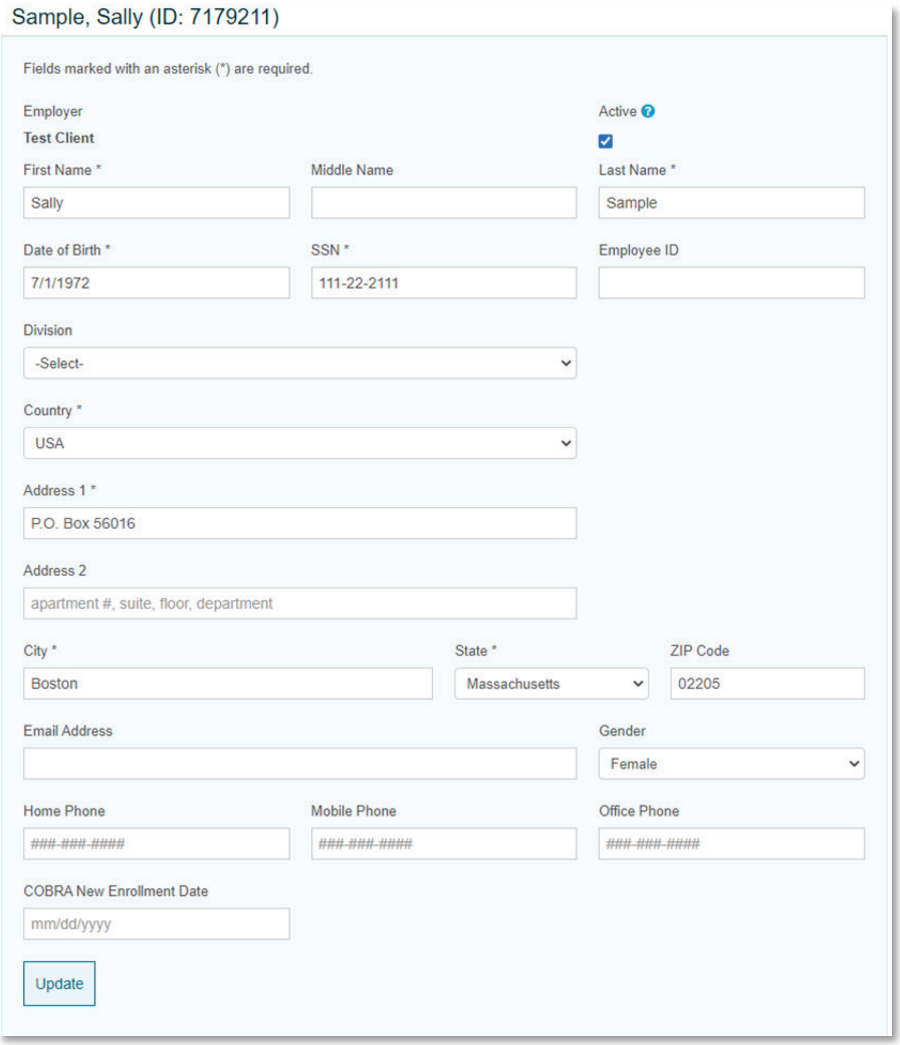
Recent Activity

From Date: 3/20/2022
To Date:
Last Name:

2 record(s)

User ID	Name	Gender	Employee ID	Hire Date	New Hire Notice Sent	Last QE	QE Date	QE Processed On	Void QE	Portal
7179211	Sample, Sally	Female				Employment Termination	3/4/2022	3/30/2022	Void	View
7182212	Sample, Sally	Male		3/1/2022	Pending					View

You can click on an individual's name in the table to view and edit the individual's information:

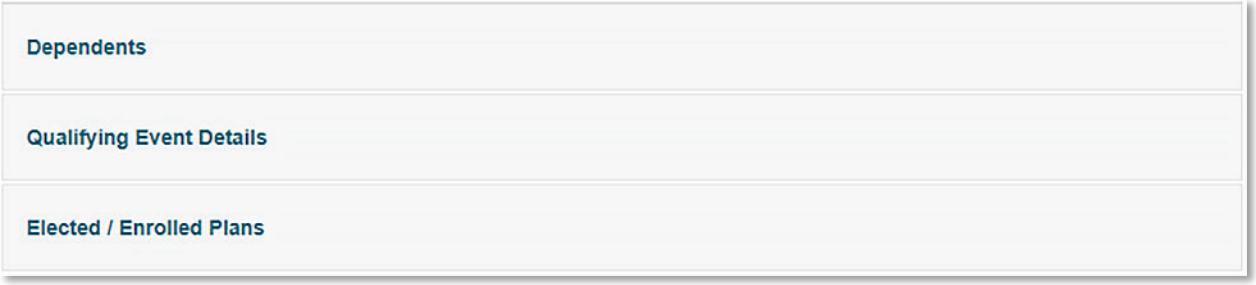


Sample, Sally (ID: 7179211)

Fields marked with an asterisk (*) are required.

Employer: Test Client
Active: ☑
First Name *: Sally
Middle Name:
Last Name *: Sample
Date of Birth *: 7/1/1972
SSN *: 111-22-2111
Employee ID:
Division: -Select-
Country *: USA
Address 1 *: P.O. Box 56016
Address 2: apartment #, suite, floor, department
City *: Boston
State *: Massachusetts
ZIP Code: 02205
Email Address:
Gender: Female
Home Phone: ###-###-####
Mobile Phone: ###-###-####
Office Phone: ###-###-####
COBRA New Enrollment Date: mm/dd/yyyy

You also have access to this individual's dependent information, qualifying event details, and plan information:



Dependents

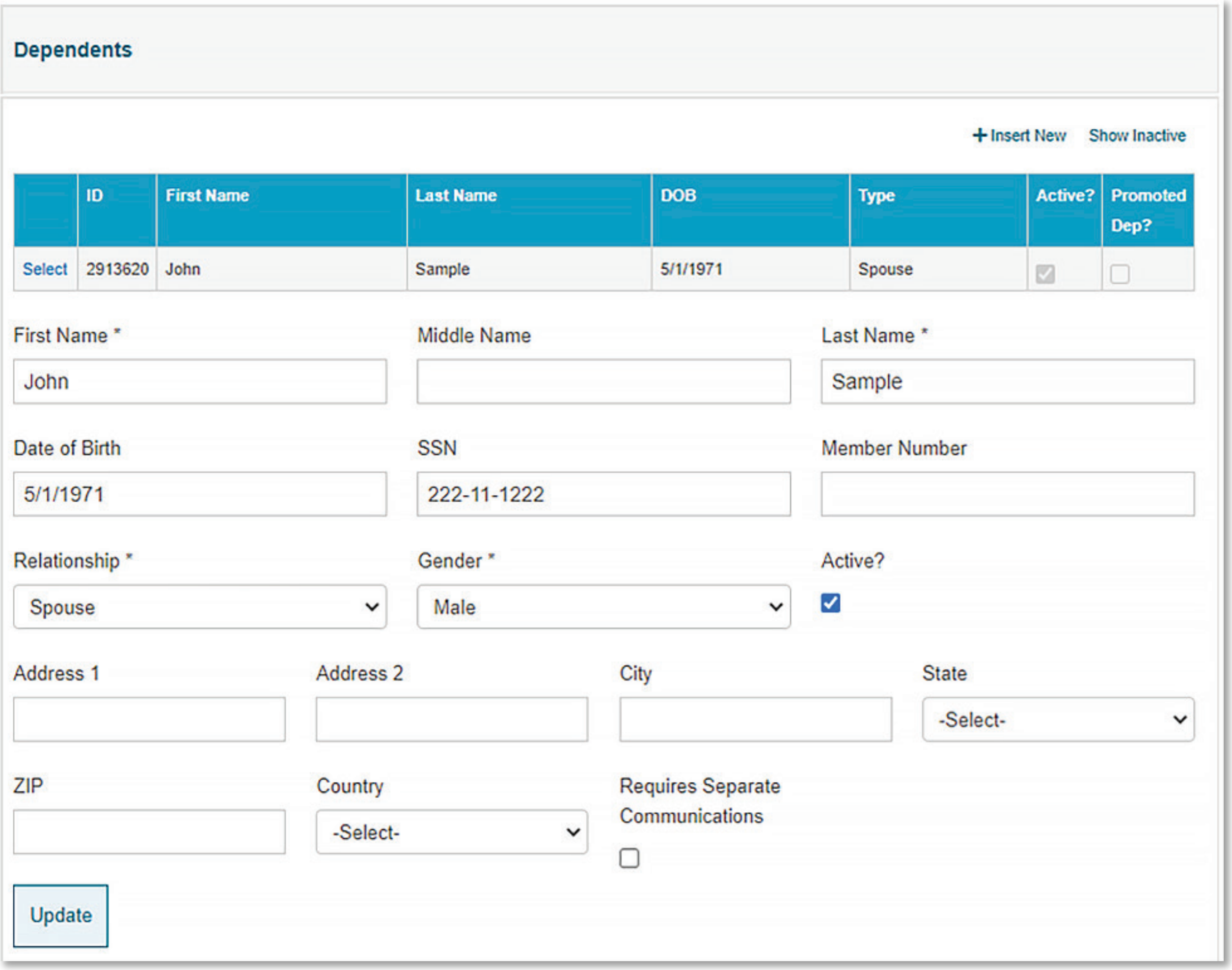
Qualifying Event Details

Elected / Enrolled Plans

Dependents

Click on Dependents to view a list of all dependents associated with the primary account holder. Click Select next to a participant's name to view their information.

You can add new dependents by clicking +Insert New.



Dependents

+Insert New Show Inactive

	ID	First Name	Last Name	DOB	Type	Active?	Promoted Dep?
Select	2913620	John	Sample	5/1/1971	Spouse	☑	☐

First Name *: John

Middle Name:

Last Name *: Sample

Date of Birth: 5/1/1971

SSN: 222-11-1222

Member Number:

Relationship *: Spouse

Gender *: Male

Active?: ☑

Address 1:

Address 2:

City:

State: -Select-

ZIP:

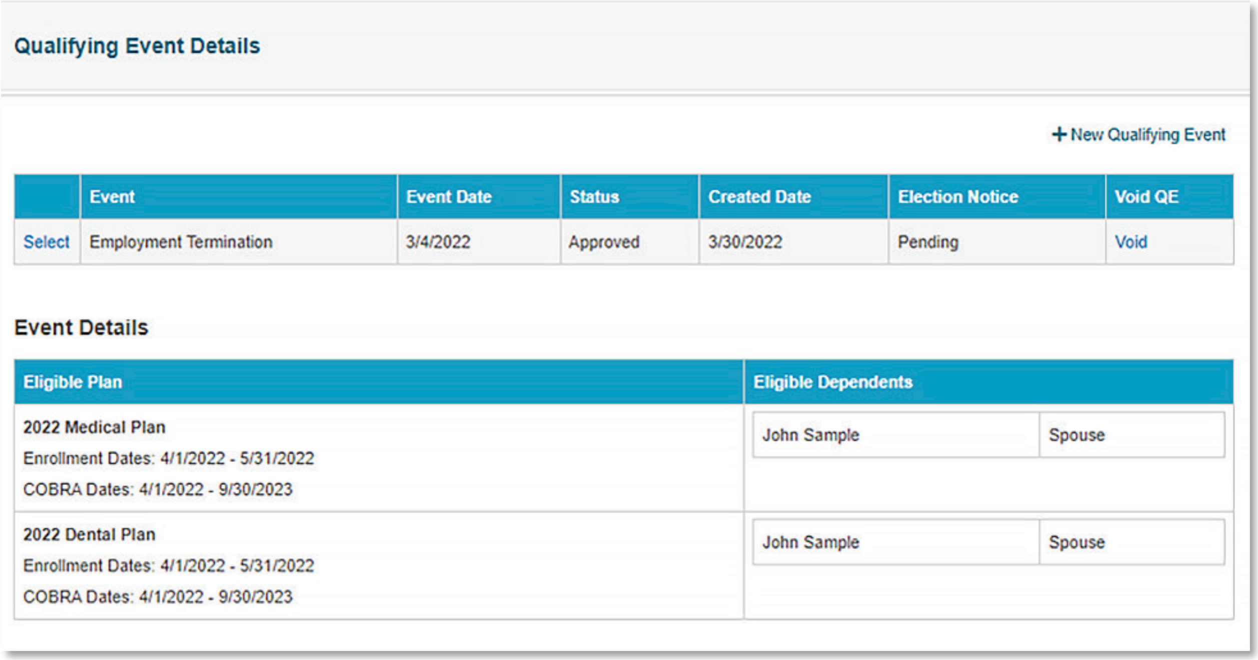
Country: -Select-

Requires Separate Communications: ☐

Update

Qualifying Event Details

Click on Qualifying Events Details to see information about the qualifying event associated with the primary account holder:



Qualifying Event Details

+ New Qualifying Event

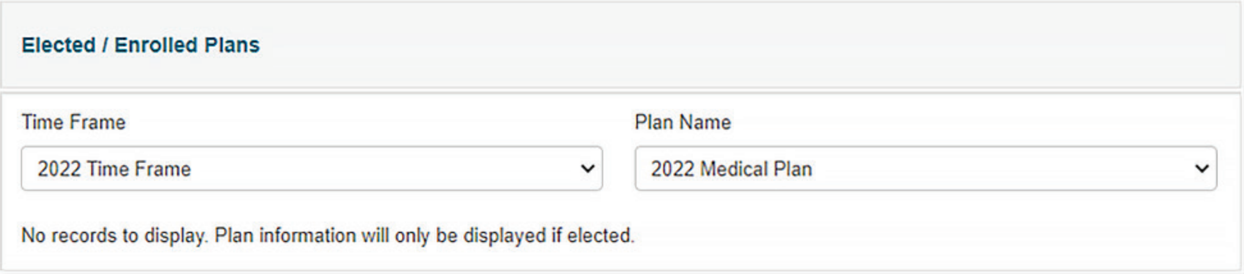
	Event	Event Date	Status	Created Date	Election Notice	Void QE
Select	Employment Termination	3/4/2022	Approved	3/30/2022	Pending	Void

Event Details

Eligible Plan	Eligible Dependents
2022 Medical Plan Enrollment Dates: 4/1/2022 - 5/31/2022 COBRA Dates: 4/1/2022 - 9/30/2023	John Sample – Spouse
2022 Dental Plan Enrollment Dates: 4/1/2022 - 5/31/2022 COBRA Dates: 4/1/2022 - 9/30/2023	John Sample – Spouse

Elected/Enrolled Plans

Choose Elected/Enrolled Plans to view the plans the individual elected to continue under COBRA (this information is only available after an individual elects COBRA).



Elected / Enrolled Plans

Time Frame: 2022 Time Frame

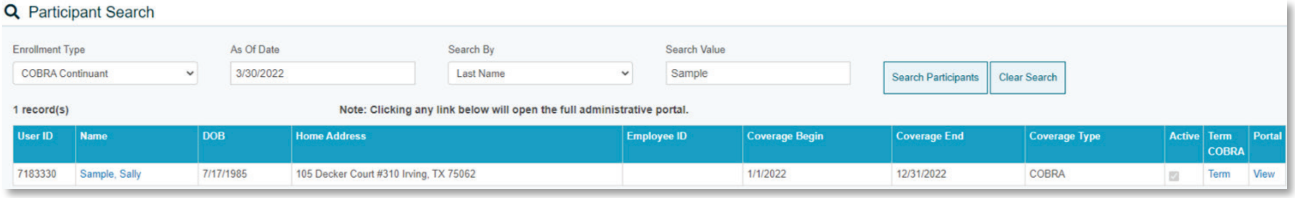
Plan Name: 2022 Medical Plan

No records to display. Plan information will only be displayed if elected.

Participant Search

The Participant Search feature is a convenient way to find information about your COBRA participants.

To locate a COBRA participant, choose COBRA Continuant from the Enrollment Type drop-down list and enter the appropriate date in the As Of Date field then click Search Participants. The results appear in a table below the search fields:



Participant Search

Enrollment Type: COBRA Continuant

As Of Date: 3/30/2022

Search By: Last Name

Search Value: Sample

1 record(s)

Note: Clicking any link below will open the full administrative portal.

User ID	Name	DOB	Home Address	Employee ID	Coverage Begin	Coverage End	Coverage Type	Active	Term COBRA	Portal
7183330	Sample, Sally	7/17/1985	105 Decker Court #310 Irving, TX 75062		1/1/2022	12/31/2022	COBRA	☑	Term	View

The results table includes a Portal column with a link for each participant. Clicking this link takes you to the individual’s account in the participant portal. When accessing the participant portal via this link, you see exactly what the participant sees when they access their portal account. This can be very helpful when you receive questions from your participants.

You can find more information about the participant portal in the Participant Portal section of this document.

Full Site

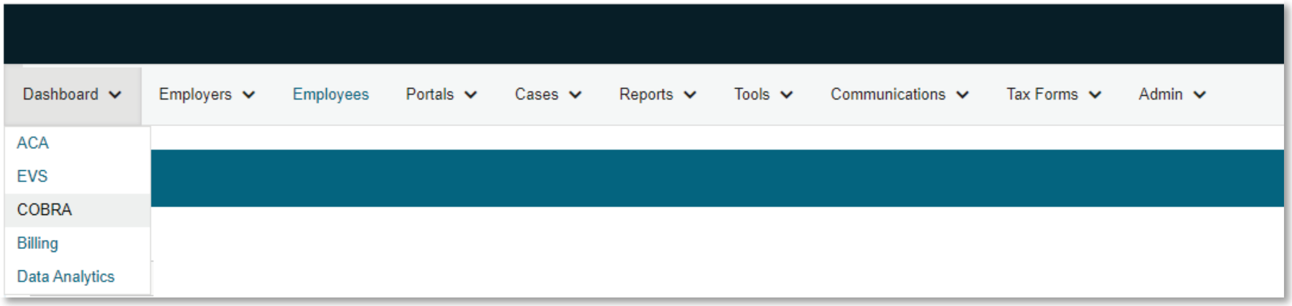
While you can do nearly everything related to COBRA and Billing Services related from the “essentials” portal, we also offer a “full site” of more in-depth tools and features, as outlined below.

To access the full site, click on My Solutions in the top navigation menu and then choose Full Site from the drop-down list.

Dashboard

The first page you see when accessing the full site is the Dashboard. The charts on the Dashboard allow you to monitor the status of your programs visually.

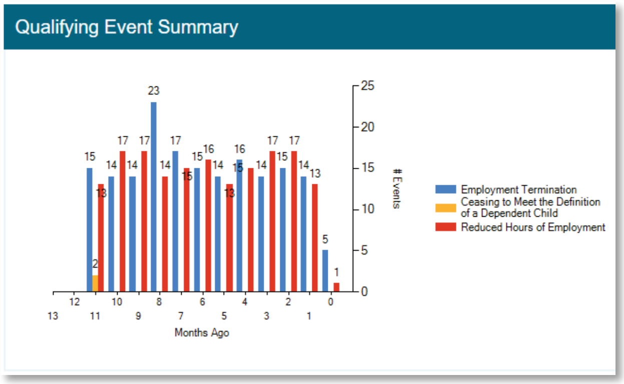
Tip: If you access the UnifyHR platform for more than one service, or if you’re not seeing COBRA or Billing information, click Dashboard in the menu and choose COBRA or Billing from the drop-down list.

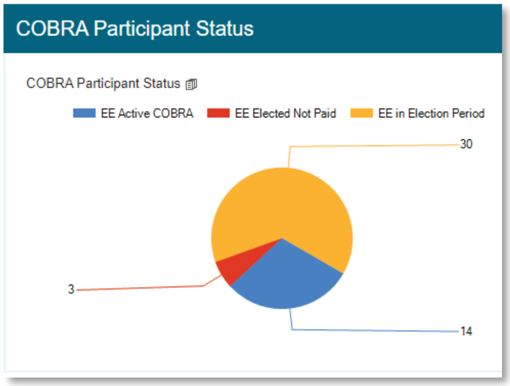


The charts on the COBRA Dashboard include:

- **Qualifying Event Summary**: This bar chart reflects the number of qualifying events by reason, by month.
- **COBRA Participant Status**: This pie chart reflects the number of active COBRA participants, the number of individuals in their election period, and the number of individuals who have elected coverage but have not yet paid.
- **Premium Remitted**: This bar chart reports the total amount of premiums remitted by month.
- **New Hires**: This bar chart reports the number of new hires each month (as submitted via the UnifyHR platform).

Chart Examples

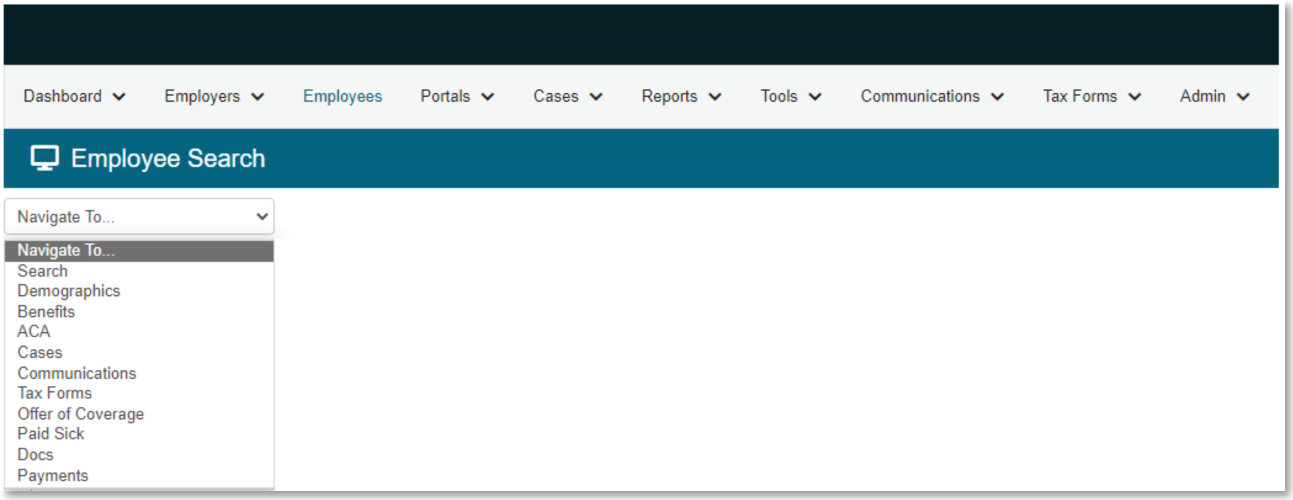




Employees

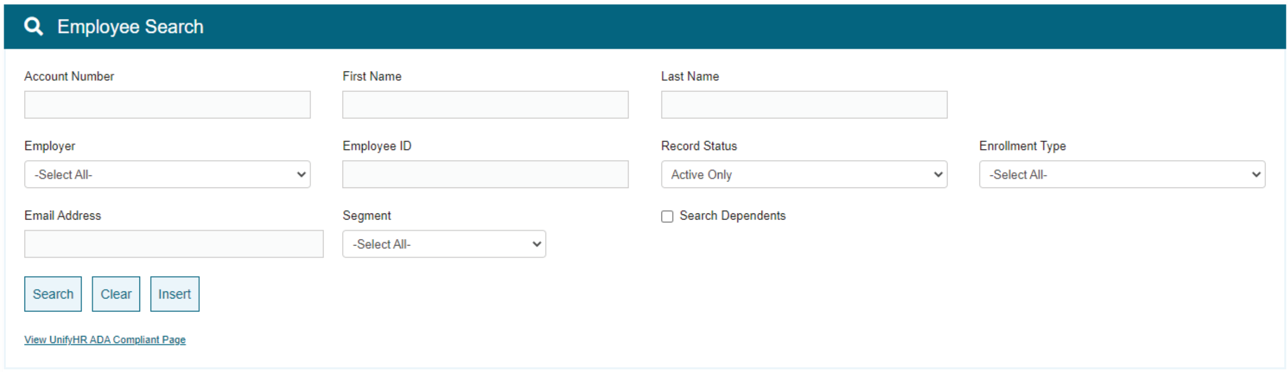
Click on Employees in the main menu to view information about your employees. Use the Navigate To drop-down list to quickly jump to key information, including:

- Search
- Demographics
- Benefits
- Cases
- Communications
- Docs
- Payments



Search

It’s easy to find employees using our employee search feature. You can search by name, account number, record status, enrollment type, or email address.



Employer: -Select All-

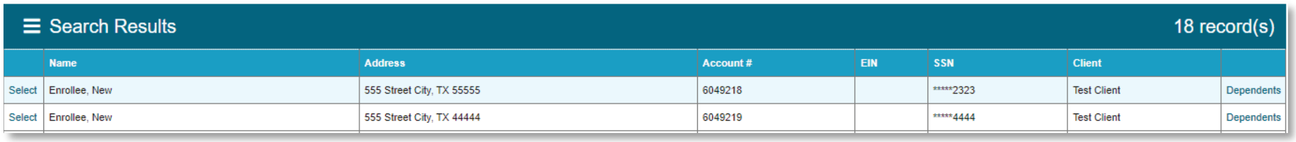
Record Status: Active Only

Enrollment Type: -Select All-

Segment: -Select All-

☐ Search Dependents

To view more information about an employee, click on the Select link in the Search Results section. The row will highlight in blue to let you know the record is selected.



	Name	Address	Account #	EIN	SSN	Client	
Select	Enrollee, New	555 Street City, TX 55555	6049218		*****2323	Test Client	Dependents
Select	Enrollee, New	555 Street City, TX 44444	6049219		*****4444	Test Client	Dependents

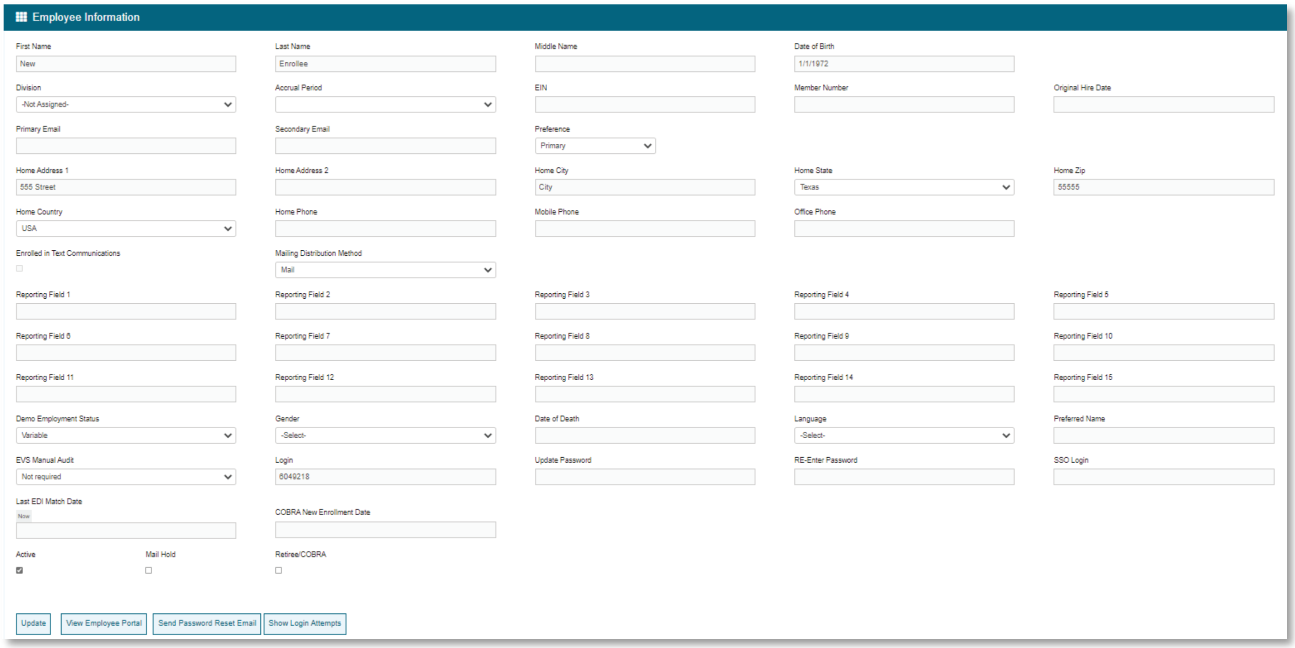
Demographics

With an employee record selected, choose Demographics from the Navigate To drop-down list to view:

- Employee information
- Dependents
- Employment history
- Eligibility
- Union
- Employee disability

Employee Information

The Employee Information section includes basic demographic information like name, address, email address, and other reporting fields.



Employee Information

First Name	New
Last Name	Enrollee
Middle Name	
Date of Birth	1/1/1972
Division	-Not Assigned-
Accrual Period	
EIN	
Member Number	
Original Hire Date	
Primary Email	
Secondary Email	
Preference	Primary
Home Address 1	555 Street
Home Address 2	
Home City	City
Home State	Texas
Home Zip	55555
Home Country	USA
Home Phone	
Mobile Phone	
Office Phone	
Enrolled in Text Communications	☐
Mailing Distribution Method	Mail
Reporting Field 1	
Reporting Field 2	
Reporting Field 3	
Reporting Field 4	
Reporting Field 5	
Reporting Field 6	
Reporting Field 7	
Reporting Field 8	
Reporting Field 9	
Reporting Field 10	
Reporting Field 11	
Reporting Field 12	
Reporting Field 13	
Reporting Field 14	
Reporting Field 15	
Demo Employment Status	Variable
Gender	-Select-
Date of Death	
Language	-Select-
Preferred Name	
EVS Manual Audit	Not required
Login	6049218
Update Password	
RE-Enter Password	
SSO Login	
Last EDI Match Date	
COBRA New Enrollment Date	
Active	☑
Mail Hold	☐
Retiree/COBRA	☐

Participant Portal Summary Page

A series of function buttons appear at the bottom of the Employee Information section. Clicking on the View Employee Portal button opens a new window that lets you view the participant's record within our participant portal.

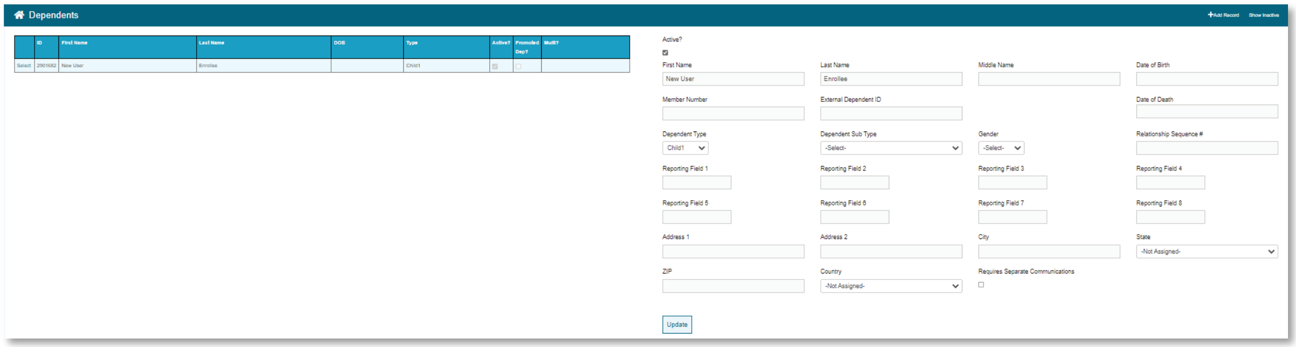
The participant's home page provides a complete summary of the participant's account and activity, including:

- Participant demographics
- Dependent information
- Documents submitted
- Mailings and forms
- Coverage information
- Invoices
- Payments

Viewing the participant's record in the participant portal is the quickest and easiest way to access a participant's information. Learn more in the Participant Portal section.

Dependents

The Dependents section lists the employee's dependents, along with their name, date of birth, dependent type, and other reporting fields.



	ID	First Name	Last Name	DOB	Type	Active?	Promoted Dep?	Multi?
Select	2901682	New User	Enrollee		Child1	☑	☐	

Active? ☑

First Name: New User

Last Name: Enrollee

Middle Name:

Date of Birth:

Member Number:

External Dependent ID:

Date of Death:

Dependent Type: Child1

Dependent Sub Type: -Select-

Gender: -Select-

Relationship Sequence #:

Reporting Field 1:

Reporting Field 2:

Reporting Field 3:

Reporting Field 4:

Reporting Field 5:

Reporting Field 6:

Reporting Field 7:

Reporting Field 8:

Address 1:

Address 2:

City:

State: -Not Assigned-

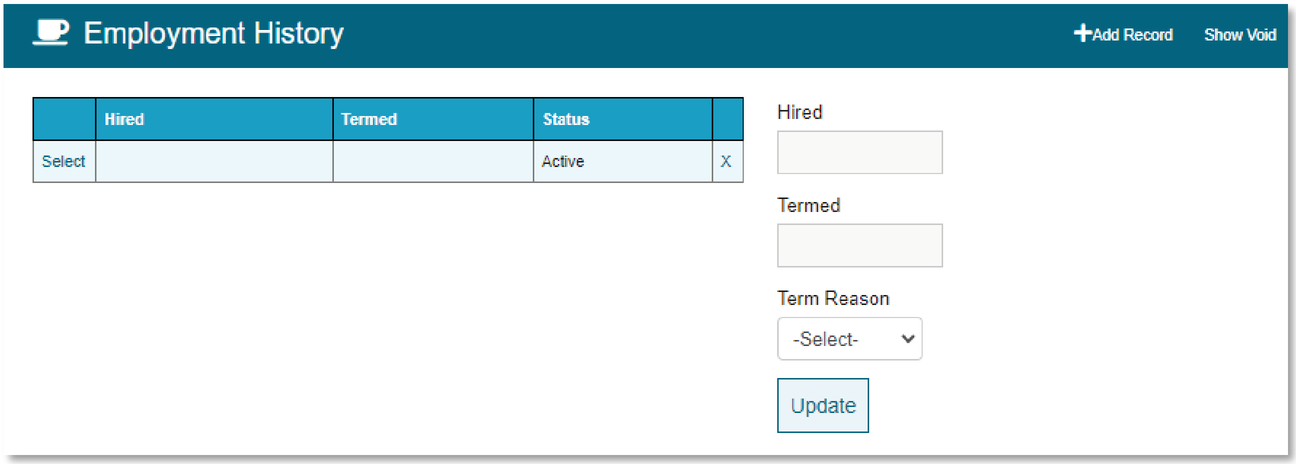
ZIP:

Country: -Not Assigned-

Requires Separate Communications ☐

Employment History

The Employment History section highlights the employee's hire date, as well as the termination date and reason (when applicable).



	Hired	Termed	Status	
Select			Active	X

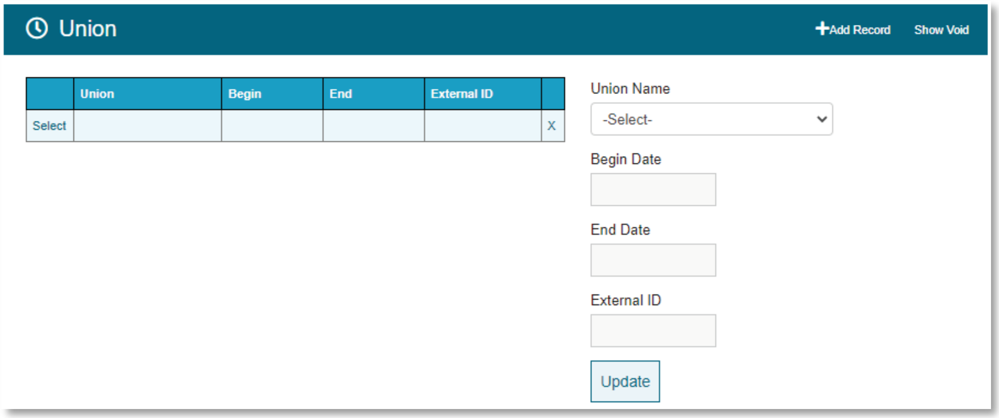
Hired:

Termed:

Term Reason: -Select-

Union

The Union section outlines union information for the selected employee (if applicable).



	Union	Begin	End	External ID	
Select					X

Union Name: -Select-

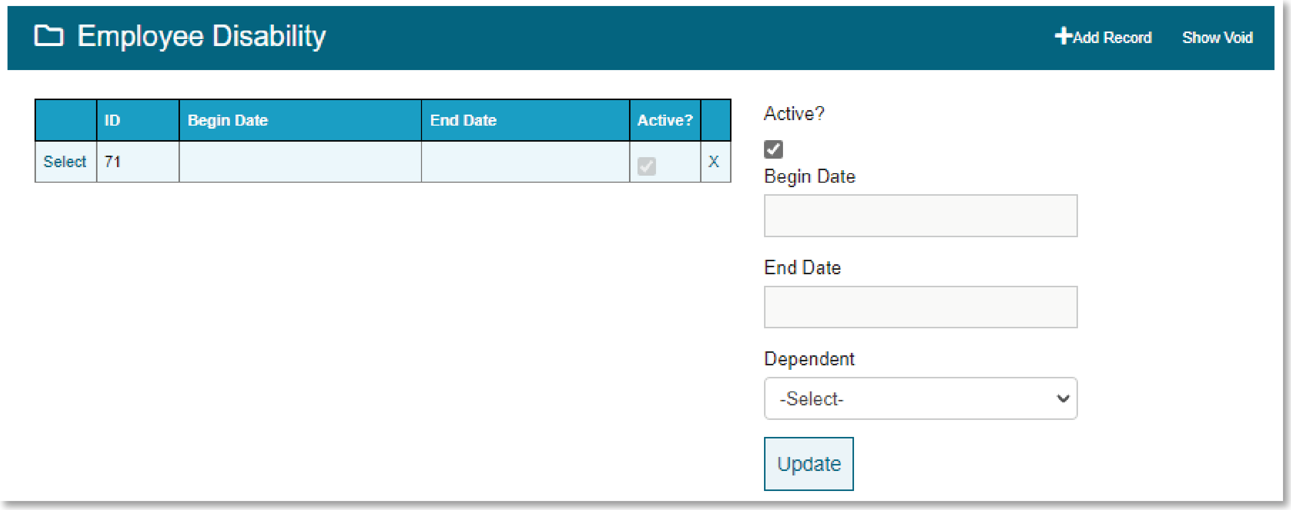
Begin Date:

End Date:

External ID:

Employee Disability

The Employee Disability section notes if an employee or dependent was disabled during a period of COBRA coverage.



	ID	Begin Date	End Date	Active?	
Select	71			☑	X

Active?
☑

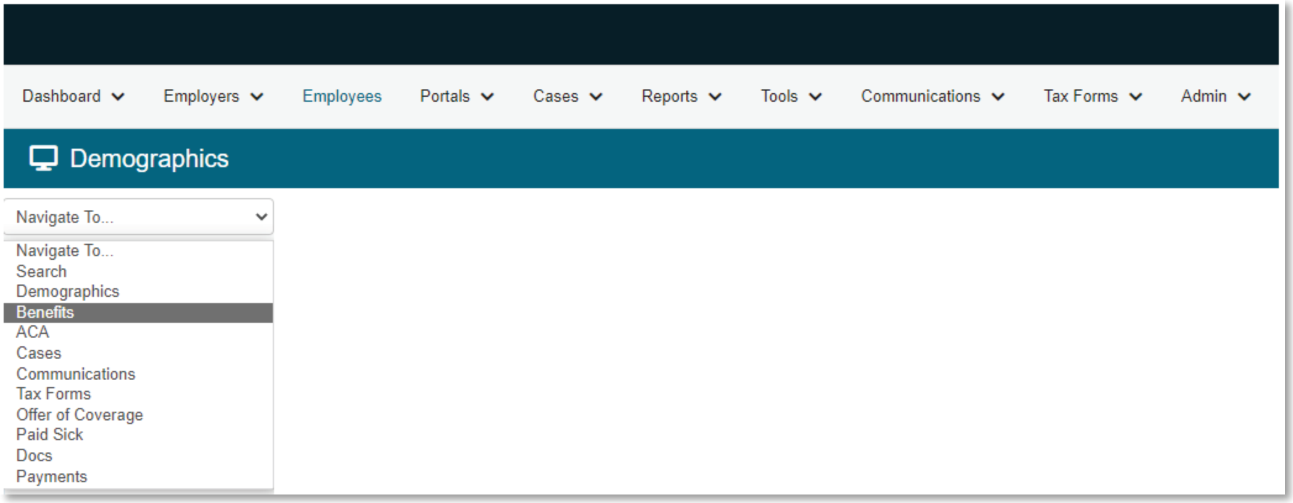
Begin Date

End Date

Dependent
-Select-

Benefits

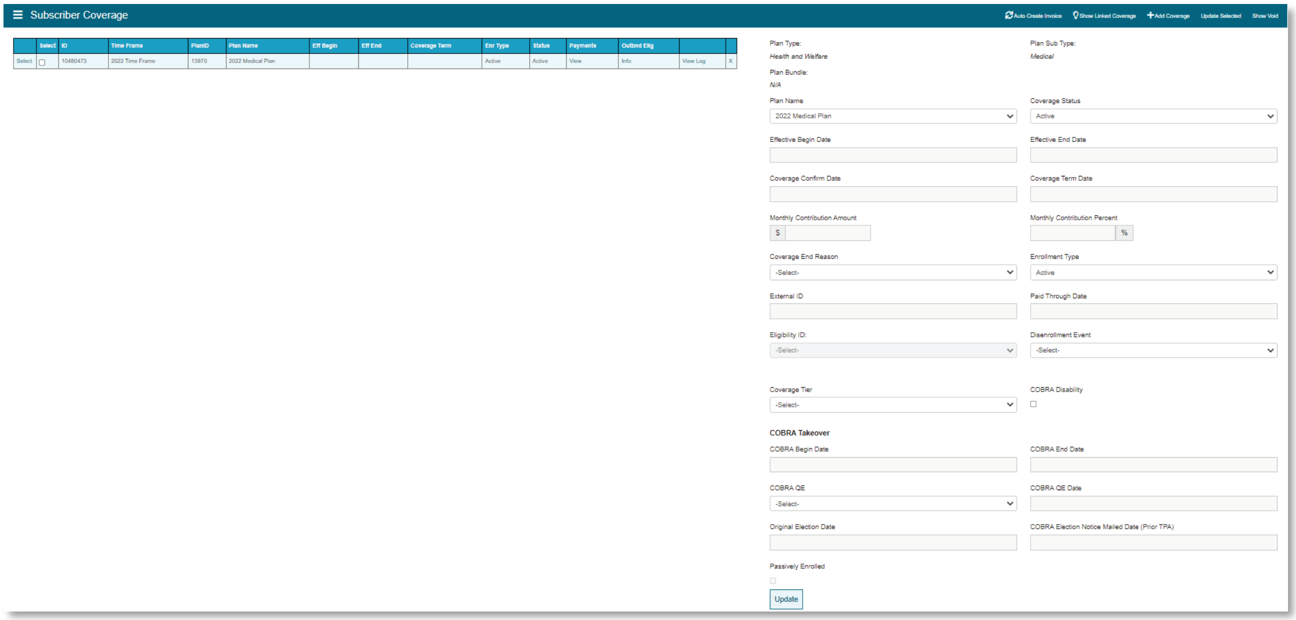
Select Benefits from the Navigate To drop-down to view benefits information for the selected employee.



The Benefits page has two sub-pages that appear as links under the main section. The Enrollment sub-page contains coverage information. The Eligibility sub-page contains enrollment events and eligibility information.

Enrollment Sub-Page: Subscriber and Dependent Coverage

The Subscriber Coverage and Dependent Coverage sections list individuals with coverage (if applicable). You can also find coverage begin and end dates, along with the reason why coverage ended (when applicable). You can also view takeover information here (a “takeover” is an individual who was already on COBRA when we began providing services – in other words, we “took over” administration for these individuals).



	Select	ID	Time Frame	PlanID	Plan Name	Eff Begin	Eff End	Coverage Term	Enr Type	Status	Payments	Outbnd Elig		
Select	☐	10480473	2022 Time Frame	13970	2022 Medical Plan				Active	Active	View	Info	View Log	X

Plan Type: *Health and Welfare*

Plan Sub Type: *Medical*

Plan Bundle: *N/A*

Plan Name: 2022 Medical Plan

Coverage Status: Active

Effective Begin Date

Effective End Date

Coverage Confirm Date

Coverage Term Date

Monthly Contribution Amount $

Monthly Contribution Percent %

Coverage End Reason: -Select-

Enrollment Type: Active

External ID

Paid Through Date

Eligibility ID: -Select-

Disenrollment Event: -Select-

Coverage Tier: -Select-

COBRA Disability ☐

COBRA Takeover

COBRA Begin Date

COBRA End Date

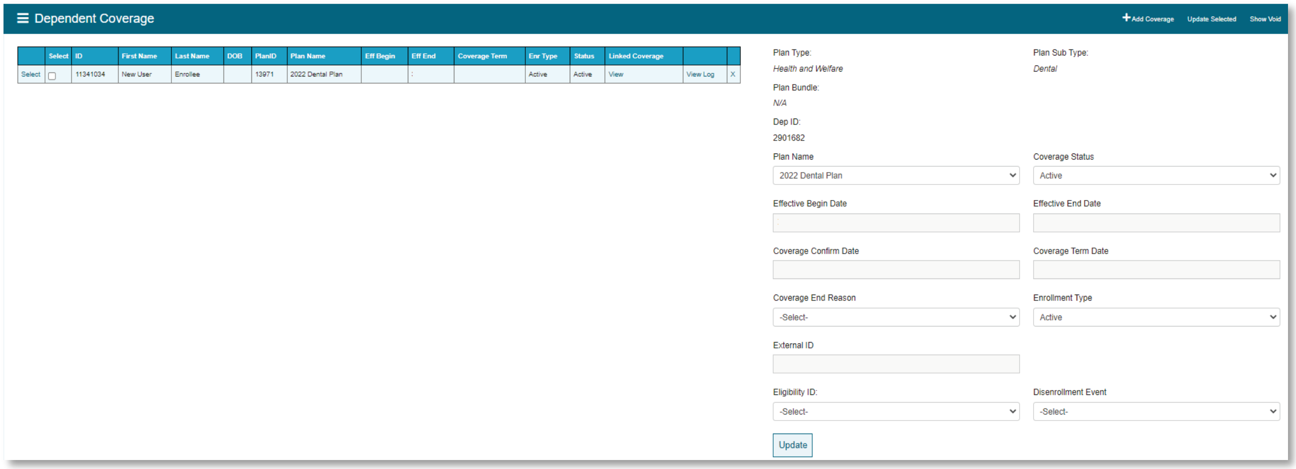
COBRA QE: -Select-

COBRA QE Date

Original Election Date

COBRA Election Notice Mailed Date (Prior TPA)

Passively Enrolled ☐



	Select	ID	First Name	Last Name	DOB	PlanID	Plan Name	Eff Begin	Eff End	Coverage Term	Enr Type	Status	Linked Coverage		
Select	☐	11341034	New User	Enrollee		13971	2022 Dental Plan		:		Active	Active	View	View Log	X

Plan Type: *Health and Welfare*

Plan Sub Type: *Dental*

Plan Bundle: *N/A*

Dep ID: 2901682

Plan Name: 2022 Dental Plan

Coverage Status: Active

Effective Begin Date

Effective End Date

Coverage Confirm Date

Coverage Term Date

Coverage End Reason: -Select-

Enrollment Type: Active

External ID

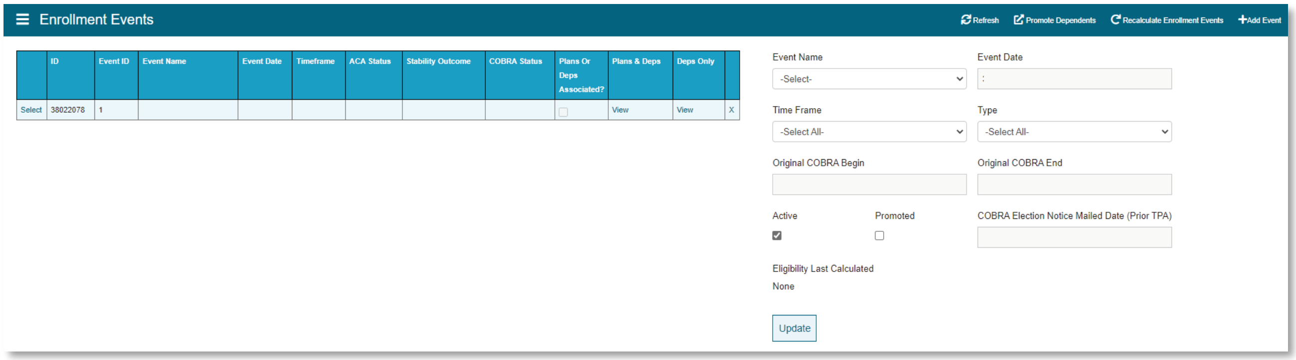
Eligibility ID: -Select-

Disenrollment Event: -Select-

Eligibility Sub-Page: Enrollment Events

The Enrollment Events section lists any enrollment events experienced by the employee or their family members. Enrollment Events may include:

- Termination of employment
- Reduced hours of employment
- Death of employee
- Divorce or legal separation
- Ceasing to meet the definition of a dependent child

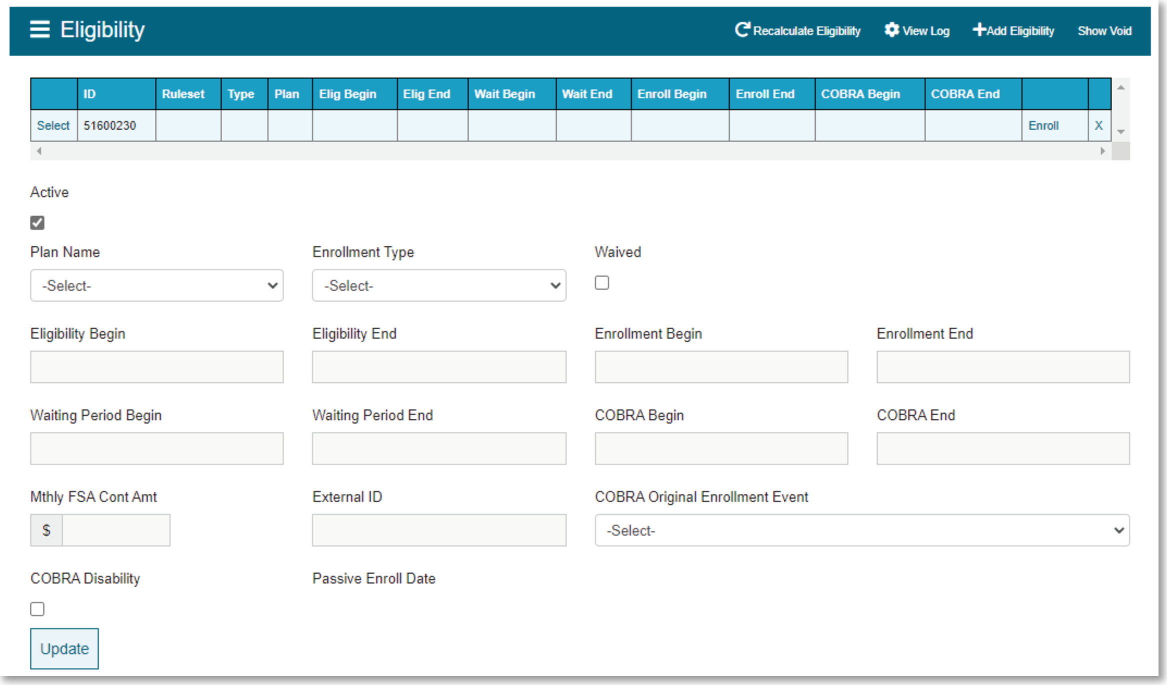


	ID	Event ID	Event Name	Event Date	Timeframe	ACA Status	Stability Outcome	COBRA Status	Plans Or Deps Associated?	Plans & Deps	Deps Only	
Select	38022078	1							☐	View	View	X

Event Name: -Select-
Event Date: :
Time Frame: -Select All-
Type: -Select All-
Original COBRA Begin
Original COBRA End
Active ☑
Promoted ☐
COBRA Election Notice Mailed Date (Prior TPA)
Eligibility Last Calculated
None

Eligibility Sub-Page: Eligibility

The Enrollment Events listed above trigger corresponding eligibility events. You can view these items in the Eligibility Section. Eligibility start and end dates, along with enrollment and COBRA-related dates, automatically populate based on the employer's plan and business rules.



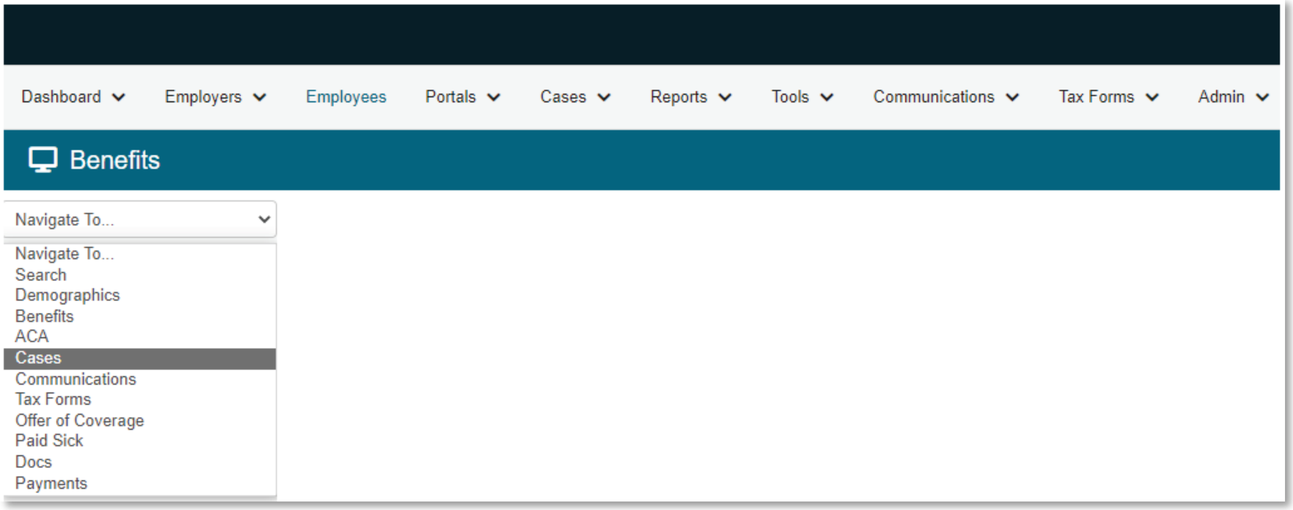
	ID	Ruleset	Type	Plan	Elig Begin	Elig End	Wait Begin	Wait End	Enroll Begin	Enroll End	COBRA Begin	COBRA End		
Select	51600230												Enroll	X

Active
☑
Plan Name: -Select-
Enrollment Type: -Select-
Waived ☐
Eligibility Begin
Eligibility End
Enrollment Begin
Enrollment End
Waiting Period Begin
Waiting Period End
COBRA Begin
COBRA End
Mthly FSA Cont Amt: $
External ID
COBRA Original Enrollment Event: -Select-
COBRA Disability ☐
Passive Enroll Date

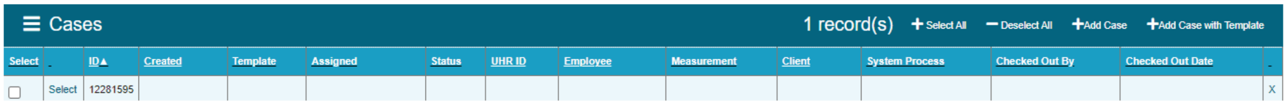
Cases

The UnifyHR platform includes a case management feature for tracking activity. Cases can be manually entered or automatically created by the system when certain things happen.

You can view cases by selecting Cases from the Navigate To drop-down list.

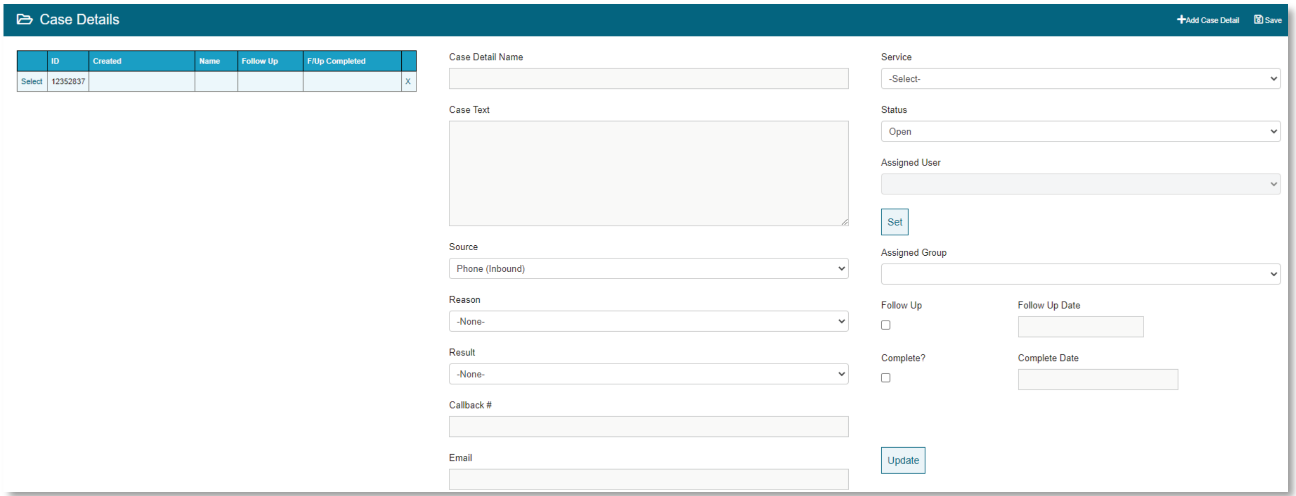


The Cases section lists all cases. Click the Select link to view the details of a case.



Select	_	ID▲	Created	Template	Assigned	Status	UHR ID	Employee	Measurement	Client	System Process	Checked Out By	Checked Out Date	_
☐	Select	12281595												X

The Case Details section indicates if a case is open or closed, whom the case is assigned to, the source of the case, and related dates.



	ID	Created	Name	Follow Up	F/Up Completed	
Select	12352837					X

Case Detail Name

Case Text

Source: Phone (Inbound)

Reason: -None-

Result: -None-

Callback #

Email

Service: -Select-

Status: Open

Assigned User

Assigned Group

Follow Up ☐

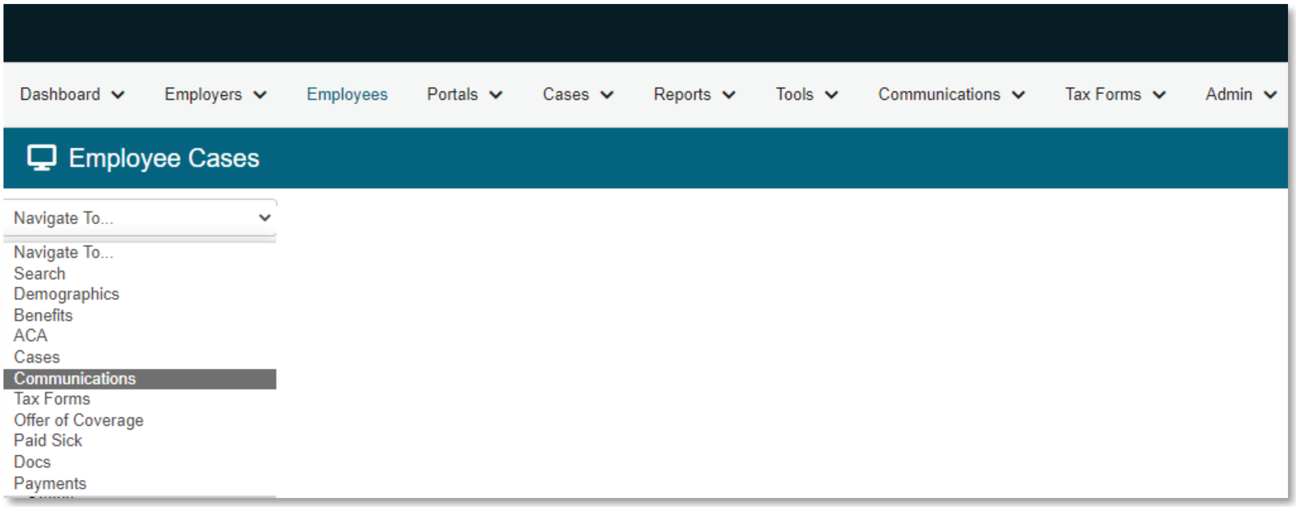
Follow Up Date

Complete? ☐

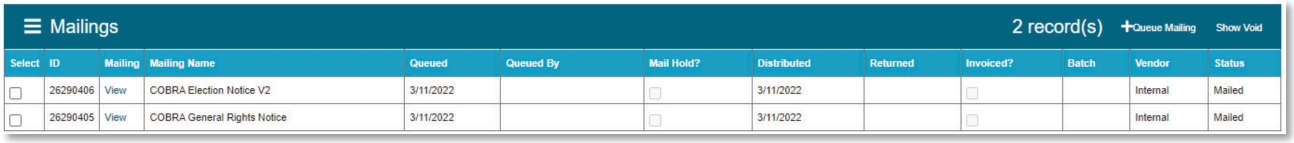
Complete Date

Communications

You can view all documents sent to employees by choosing Communications from the Navigate To drop-down list. Documents may be sent by mail, email, text, or added to the portal as an alert (note that COBRA notices are not sent by email or text).



The Mailings section list all documents sent by mail. You can view communications sent by other methods in the respective Emails, Portal Alerts, and Text Messages sections.



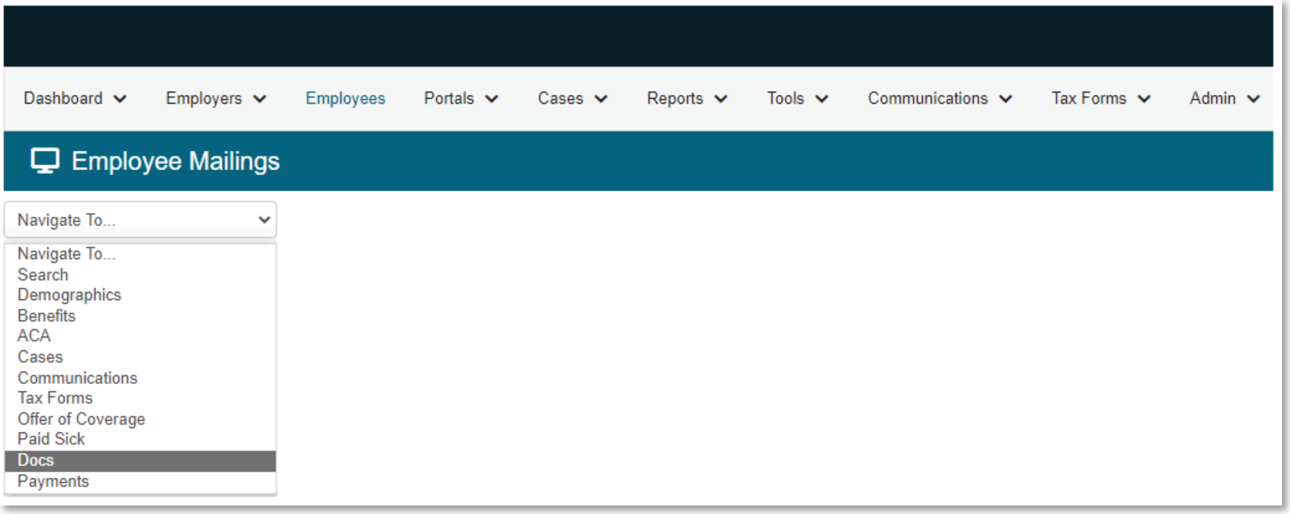
Select	ID	Mailing	Mailing Name	Queued	Queued By	Mail Hold?	Distributed	Returned	Invoiced?	Batch	Vendor	Status
☐	26290406	View	COBRA Election Notice V2	3/11/2022		☐	3/11/2022		☐		Internal	Mailed
☐	26290405	View	COBRA General Rights Notice	3/11/2022		☐	3/11/2022		☐		Internal	Mailed

Communications include:

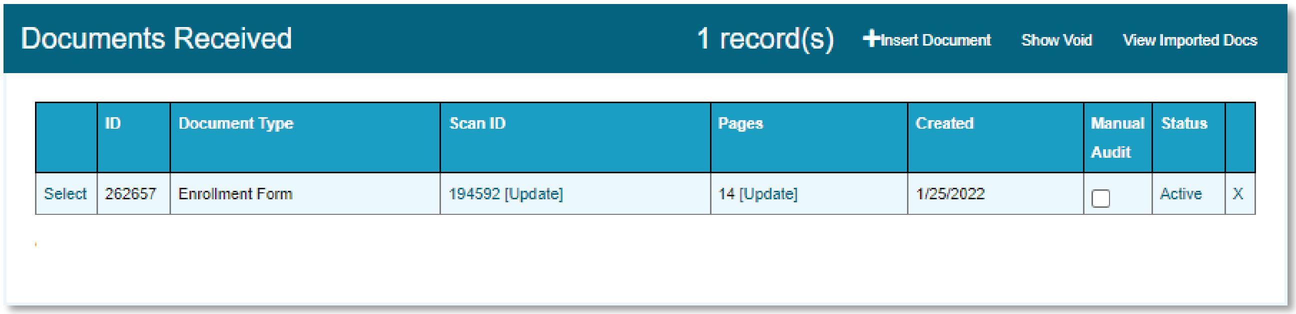
- COBRA General Rights Notice
- COBRA Election Notice
- COBRA Payment Reminder Notice
- COBRA Notice of Insufficient Premium Payments
- COBRA Open Enrollment
- COBRA Rate Change Notice
- COBRA Early Termination Notice
- COBRA Expiration Notice
- COBRA Notice of Unavailability
- Payment Refund Notice

Docs

Select Docs from the Navigate To drop-down list to view documents submitted by the employee.

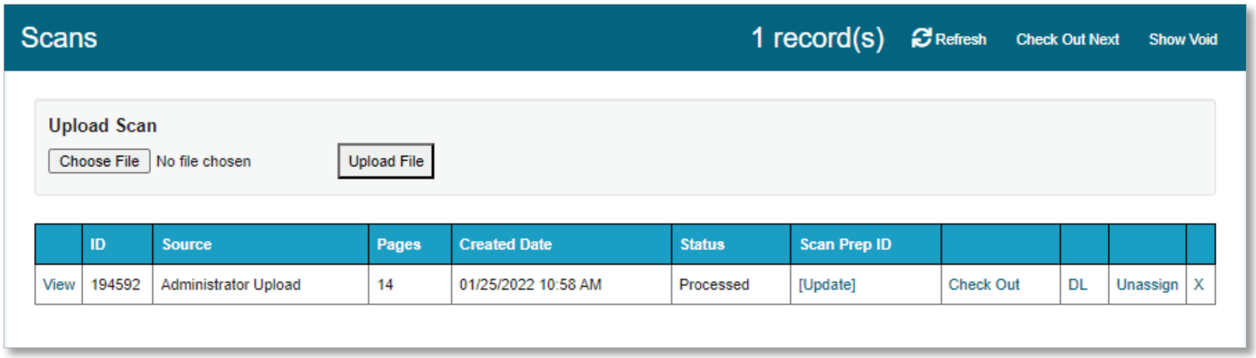


The Documents Received section lists all documents received from the employee. Documents may include checks, election notices, and open enrollment forms.



	ID	Document Type	Scan ID	Pages	Created	Manual Audit	Status	
Select	262657	Enrollment Form	194592 [Update]	14 [Update]	1/25/2022	☐	Active	X

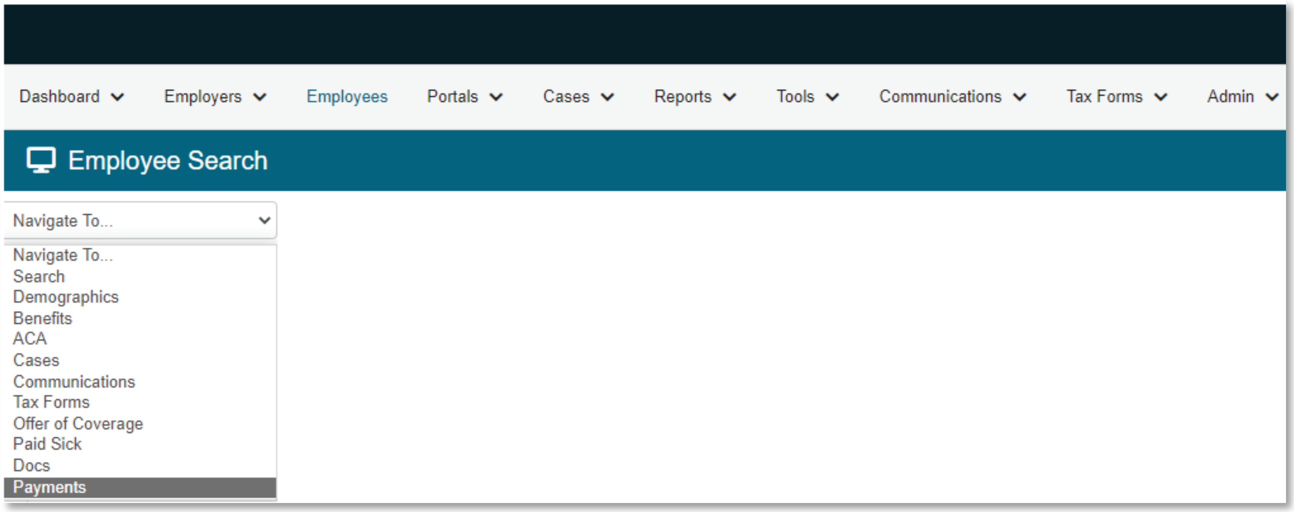
To view the scanned image of a document, select the document in the Documents Received section, and then click the View link in the Scans section.



	ID	Source	Pages	Created Date	Status	Scan Prep ID				
View	194592	Administrator Upload	14	01/25/2022 10:58 AM	Processed	[Update]	Check Out	DL	Unassign	X

Payments

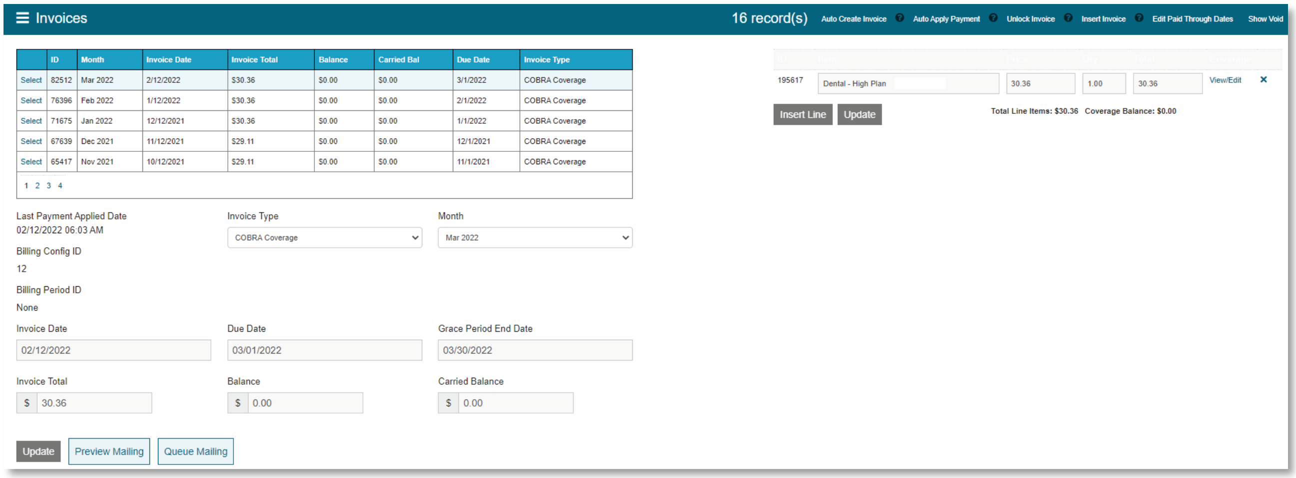
Choose Payments from the Navigate To drop-down list to view invoice and payment information.



The Invoices section lists all invoices issued for the employee. You can also view the plan information and amount, as well as the due date and grace period end date.

If any portion of a payment is applied to an invoice, that amount is deducted from the amount owed.

Select an invoice to view a breakdown of the plans and rates billed for on that invoice.



	ID	Month	Invoice Date	Invoice Total	Balance	Carried Bal	Due Date	Invoice Type
Select	82512	Mar 2022	2/12/2022	$30.36	$0.00	$0.00	3/1/2022	COBRA Coverage
Select	76396	Feb 2022	1/12/2022	$30.36	$0.00	$0.00	2/1/2022	COBRA Coverage
Select	71675	Jan 2022	12/12/2021	$30.36	$0.00	$0.00	1/1/2022	COBRA Coverage
Select	67639	Dec 2021	11/12/2021	$29.11	$0.00	$0.00	12/1/2021	COBRA Coverage
Select	65417	Nov 2021	10/12/2021	$29.11	$0.00	$0.00	11/1/2021	COBRA Coverage

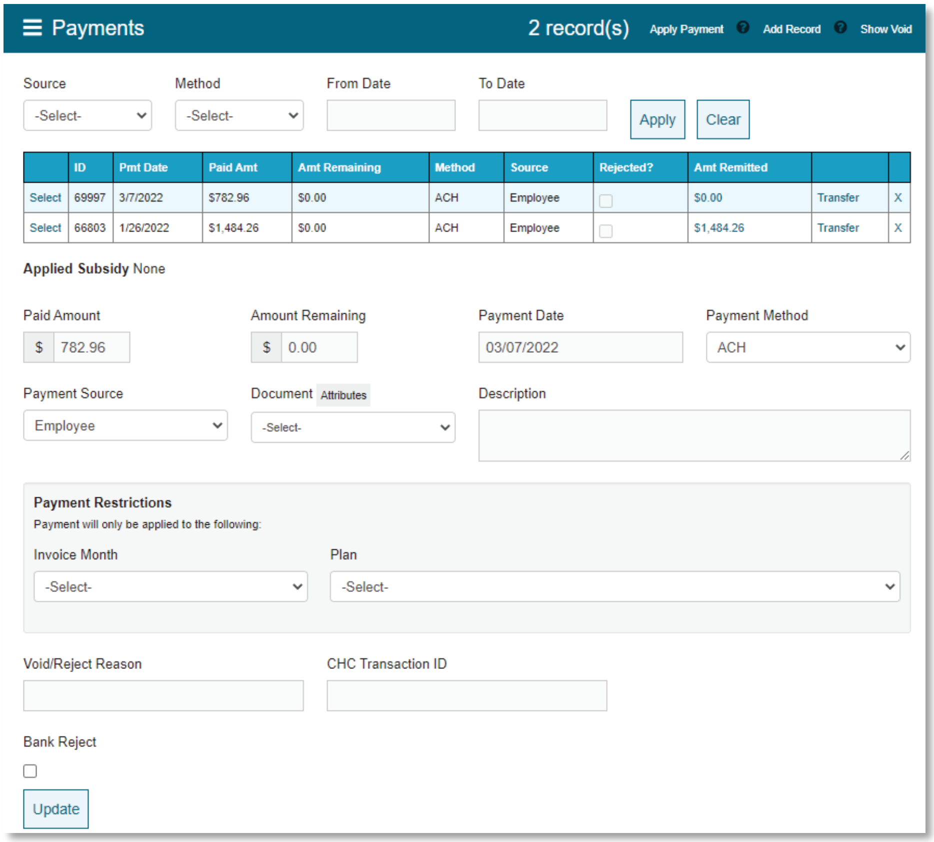
1 2 3 4

Last Payment Applied Date: 02/12/2022 06:03 AM
Invoice Type: COBRA Coverage
Month: Mar 2022
Billing Config ID: 12
Billing Period ID: None
Invoice Date: 02/12/2022
Due Date: 03/01/2022
Grace Period End Date: 03/30/2022
Invoice Total: $ 30.36
Balance: $ 0.00
Carried Balance: $ 0.00

ID	Item	Price	Qty	Total	Coverage	
195617	Dental - High Plan	30.36	1.00	30.36	View/Edit	✕

Total Line Items: $30.36 Coverage Balance: $0.00

The Payments section lists all payments received, as well as the payment date and method.



	ID	Pmt Date	Paid Amt	Amt Remaining	Method	Source	Rejected?	Amt Remitted		
Select	69997	3/7/2022	$782.96	$0.00	ACH	Employee	☐	$0.00	Transfer	X
Select	66803	1/26/2022	$1,484.26	$0.00	ACH	Employee	☐	$1,484.26	Transfer	X

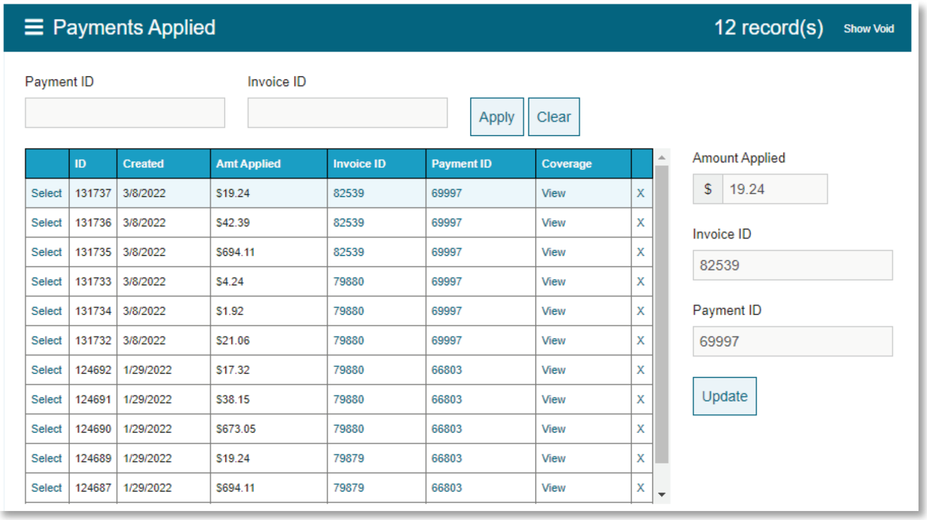
Applied Subsidy None

Paid Amount: $ 782.96
Amount Remaining: $ 0.00
Payment Date: 03/07/2022
Payment Method: ACH
Payment Source: Employee
Document: -Select-
Description:

Payment Restrictions
Payment will only be applied to the following:
Invoice Month: -Select-
Plan: -Select-

Void/Reject Reason:
CHC Transaction ID:
Bank Reject ☐

Payments applied to an invoice appear in the Payments Applied section. The ID in the Payments section appears in the Payment ID column in the Payments Applied section. A single payment may apply to multiple invoices, which means the same Payment ID may appear multiple times.



	ID	Created	Amt Applied	Invoice ID	Payment ID	Coverage	
Select	131737	3/8/2022	$19.24	82539	69997	View	X
Select	131736	3/8/2022	$42.39	82539	69997	View	X
Select	131735	3/8/2022	$694.11	82539	69997	View	X
Select	131733	3/8/2022	$4.24	79880	69997	View	X
Select	131734	3/8/2022	$1.92	79880	69997	View	X
Select	131732	3/8/2022	$21.06	79880	69997	View	X
Select	124692	1/29/2022	$17.32	79880	66803	View	X
Select	124691	1/29/2022	$38.15	79880	66803	View	X
Select	124690	1/29/2022	$673.05	79880	66803	View	X
Select	124689	1/29/2022	$19.24	79879	66803	View	X
Select	124687	1/29/2022	$694.11	79879	66803	View	X

Amount Applied: $ 19.24
Invoice ID: 82539
Payment ID: 69997

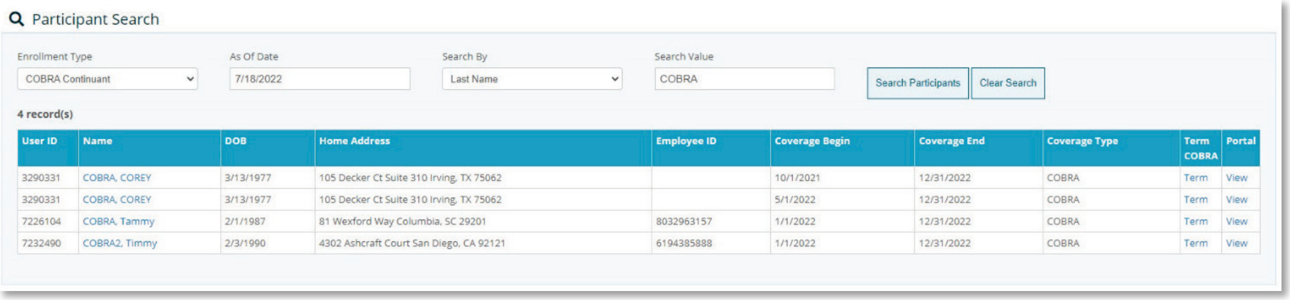
Any refunds or subsidy amounts appear in the Refunds and Subsidy sections, respectively.

Participant Portal

You can also learn about the participant portal by watching our Participant Portal Overview video.

You can view participant information in the same way participants do by accessing our Participant Portal.

To view a participant's information on the Participant Portal, first perform a Participant Search to locate the participant's record, then click View in the Portal column.



Participant Search

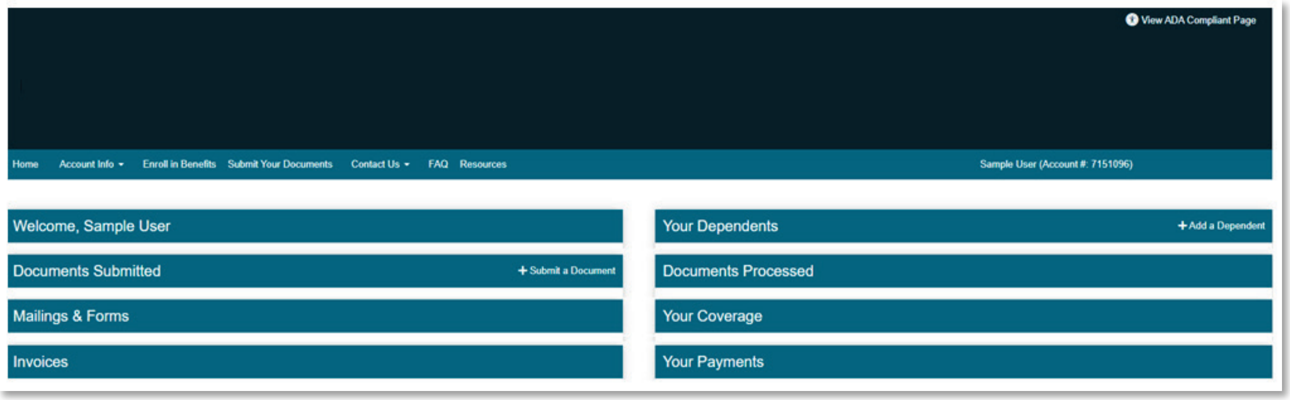
Enrollment Type: COBRA Continuant
As Of Date: 7/18/2022
Search By: Last Name
Search Value: COBRA

4 record(s)

User ID	Name	DOB	Home Address	Employee ID	Coverage Begin	Coverage End	Coverage Type	Term COBRA	Portal
3290331	COBRA, COREY	3/13/1977	105 Decker Ct Suite 310 Irving, TX 75062		10/1/2021	12/31/2022	COBRA	Term	View
3290331	COBRA, COREY	3/13/1977	105 Decker Ct Suite 310 Irving, TX 75062		5/1/2022	12/31/2022	COBRA	Term	View
7226104	COBRA, Tammy	2/1/1987	81 Wexford Way Columbia, SC 29201	8032963157	1/1/2022	12/31/2022	COBRA	Term	View
7232490	COBRA2, Timmy	2/3/1990	4302 Ashcraft Court San Diego, CA 92121	6194385888	1/1/2022	12/31/2022	COBRA	Term	View

The participant's home page provides a complete summary of the participant's account and activity, including:

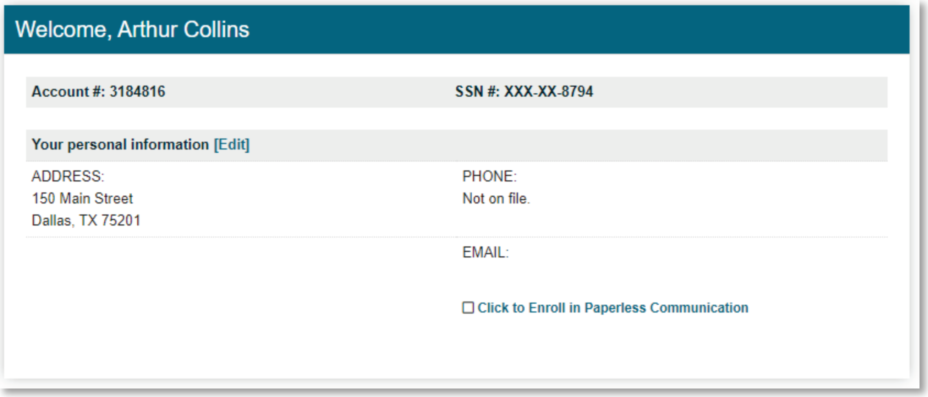
- Participant demographics
- Dependent information
- Documents submitted
- Mailings and forms
- Coverage information
- Invoices
- Payments



The screenshot above is from a test account, so no username is present, and the sections are all collapsed.

Welcome

The Welcome section presents the participant's account number and contact details. Participants can also sign up for paperless communications by checking the box in this section (some notices must be sent by mail even when a participant selects paperless communications).



Welcome, Arthur Collins

Account #: 3184816 **SSN #:** XXX-XX-8794

Your personal information [Edit]

ADDRESS:
150 Main Street
Dallas, TX 75201

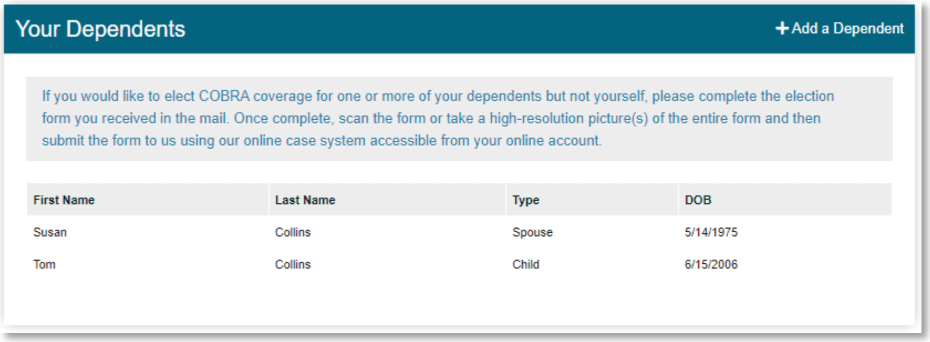
PHONE:
Not on file.

EMAIL:

☐ Click to Enroll in Paperless Communication

Your Dependents

The Your Dependents section lists any dependents tied to the participant. The dependent type and date of birth are also listed.



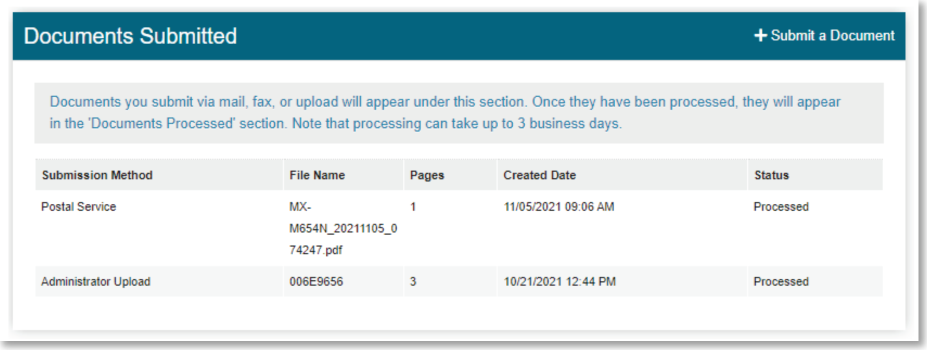
Your Dependents

If you would like to elect COBRA coverage for one or more of your dependents but not yourself, please complete the election form you received in the mail. Once complete, scan the form or take a high-resolution picture(s) of the entire form and then submit the form to us using our online case system accessible from your online account.

First Name	Last Name	Type	DOB
Susan	Collins	Spouse	5/14/1975
Tom	Collins	Child	6/15/2006

Documents Submitted

All documents submitted by the participant are viewable in the Documents Submitted section.



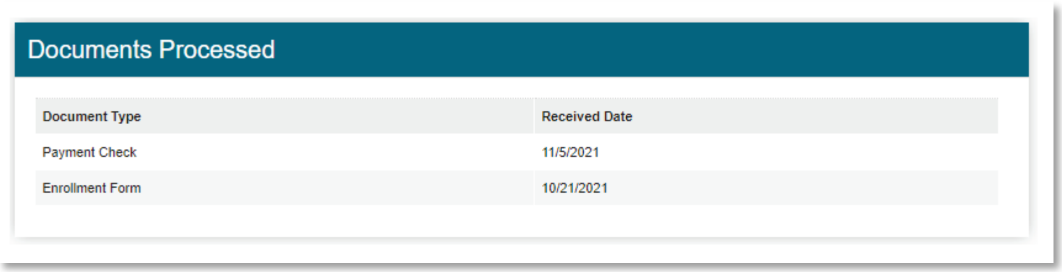
Documents Submitted

Documents you submit via mail, fax, or upload will appear under this section. Once they have been processed, they will appear in the 'Documents Processed' section. Note that processing can take up to 3 business days.

Submission Method	File Name	Pages	Created Date	Status
Postal Service	MX-M654N_20211105_074247.pdf	1	11/05/2021 09:06 AM	Processed
Administrator Upload	006E9656	3	10/21/2021 12:44 PM	Processed

Documents Processed Section

From time to time, participants may need to submit documents to us. The Documents Submitted section lists any documents sent to us, along with details about the document(s).



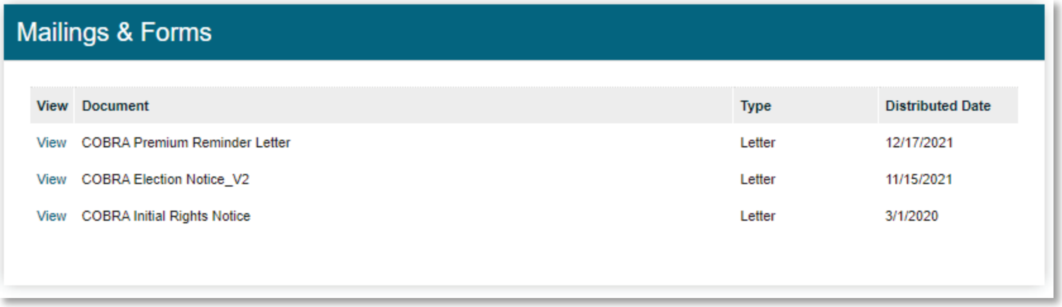
Documents Processed

Document Type	Received Date
Payment Check	11/5/2021
Enrollment Form	10/21/2021

Mailings & Forms

The Mailing & Forms section lists all documents sent to a participant. The section includes the document name, type, and distribution date.

Click the View link next to the document name to view the document.

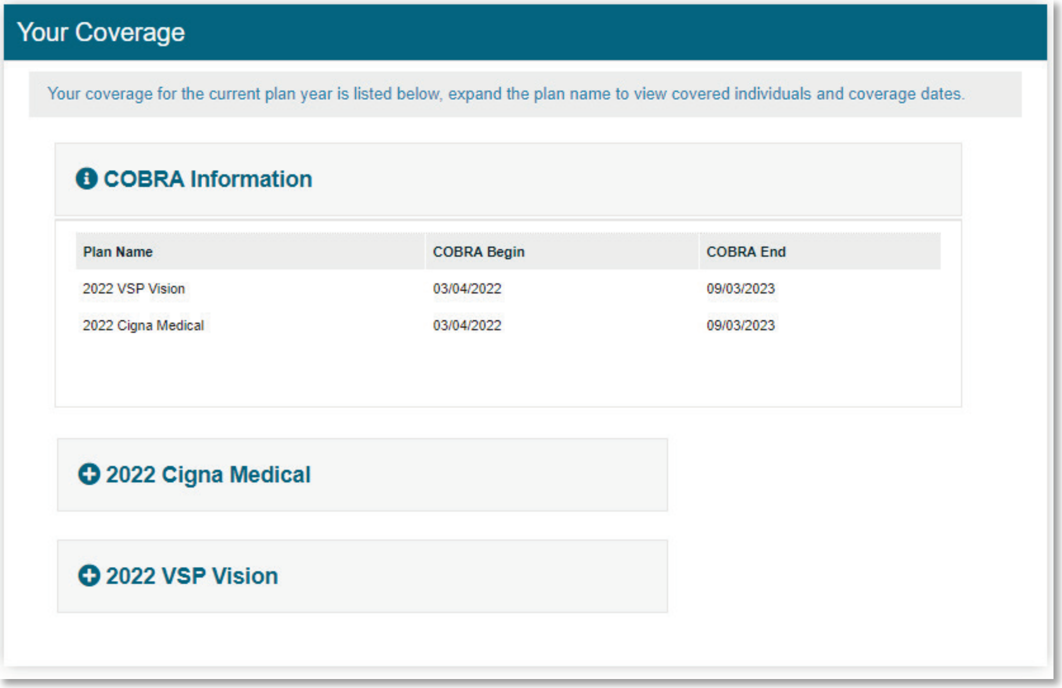


Mailings & Forms

View	Document	Type	Distributed Date
View	COBRA Premium Reminder Letter	Letter	12/17/2021
View	COBRA Election Notice_V2	Letter	11/15/2021
View	COBRA Initial Rights Notice	Letter	3/1/2020

Coverage

A participant's current plan year coverage is viewable in the Your Coverage section. Click the + sign to view the individuals covered and the coverage dates.



Your Coverage

Your coverage for the current plan year is listed below, expand the plan name to view covered individuals and coverage dates.

ℹ COBRA Information

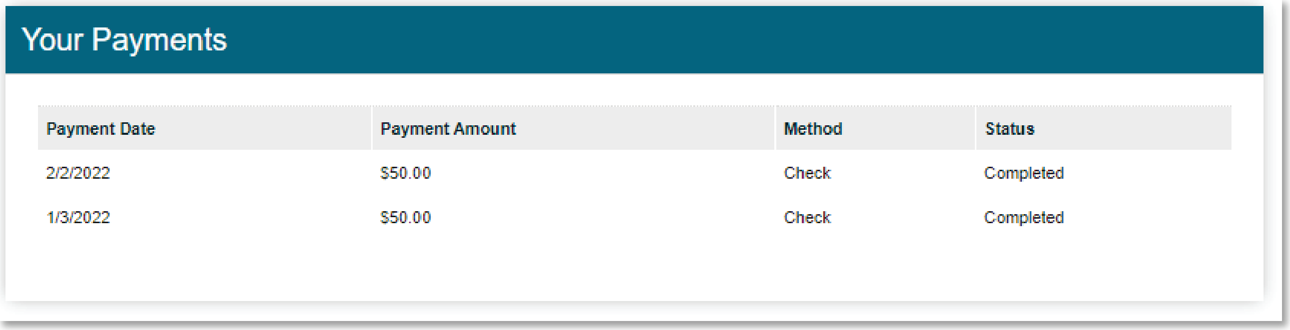
Plan Name	COBRA Begin	COBRA End
2022 VSP Vision	03/04/2022	09/03/2023
2022 Cigna Medical	03/04/2022	09/03/2023

⊕ 2022 Cigna Medical

⊕ 2022 VSP Vision

Payments

The Your Payments section lists all payments made by a participant. We list the payment date, payment amount, and source so payments are easy to identify.



Your Payments

Payment Date	Payment Amount	Method	Status
2/2/2022	$50.00	Check	Completed
1/3/2022	$50.00	Check	Completed

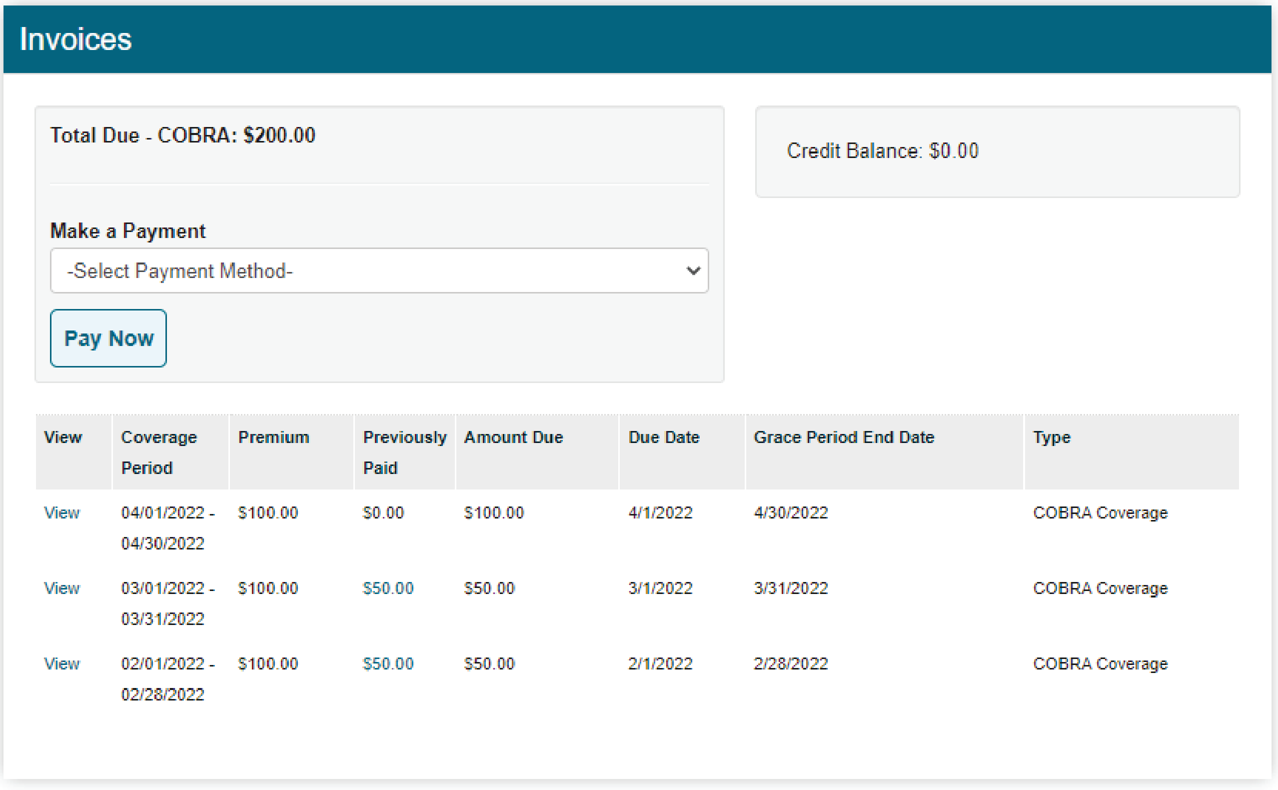
Invoices

The Invoices section lists all invoices issued to the participant. The coverage period, premium amount, previously paid amount, monthly payment amount, due date, grace period end date, and coverage type are also listed.

We call out the Total Due and Credit Balance amounts so it's easy to check current status.

A credit balance occurs when we receive payment, but that payment has not yet been applied to an invoice. Any credit balance amount will be applied to the next invoice we generate.

Click the View link next to the Coverage Period to view an invoice.



Invoices

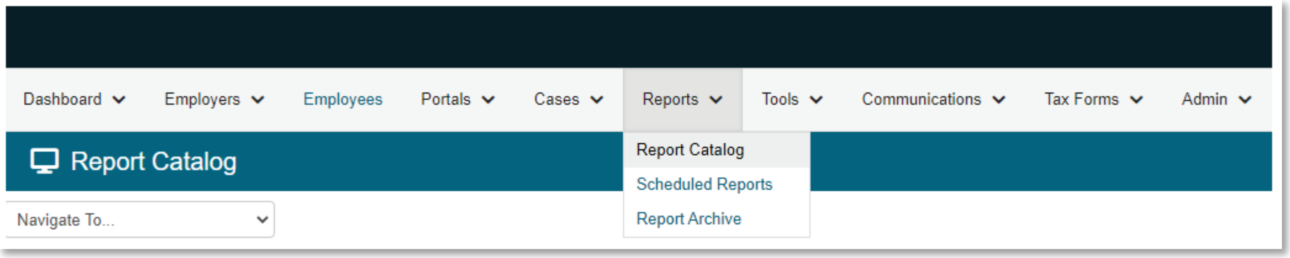
Total Due - COBRA: $200.00

Credit Balance: $0.00

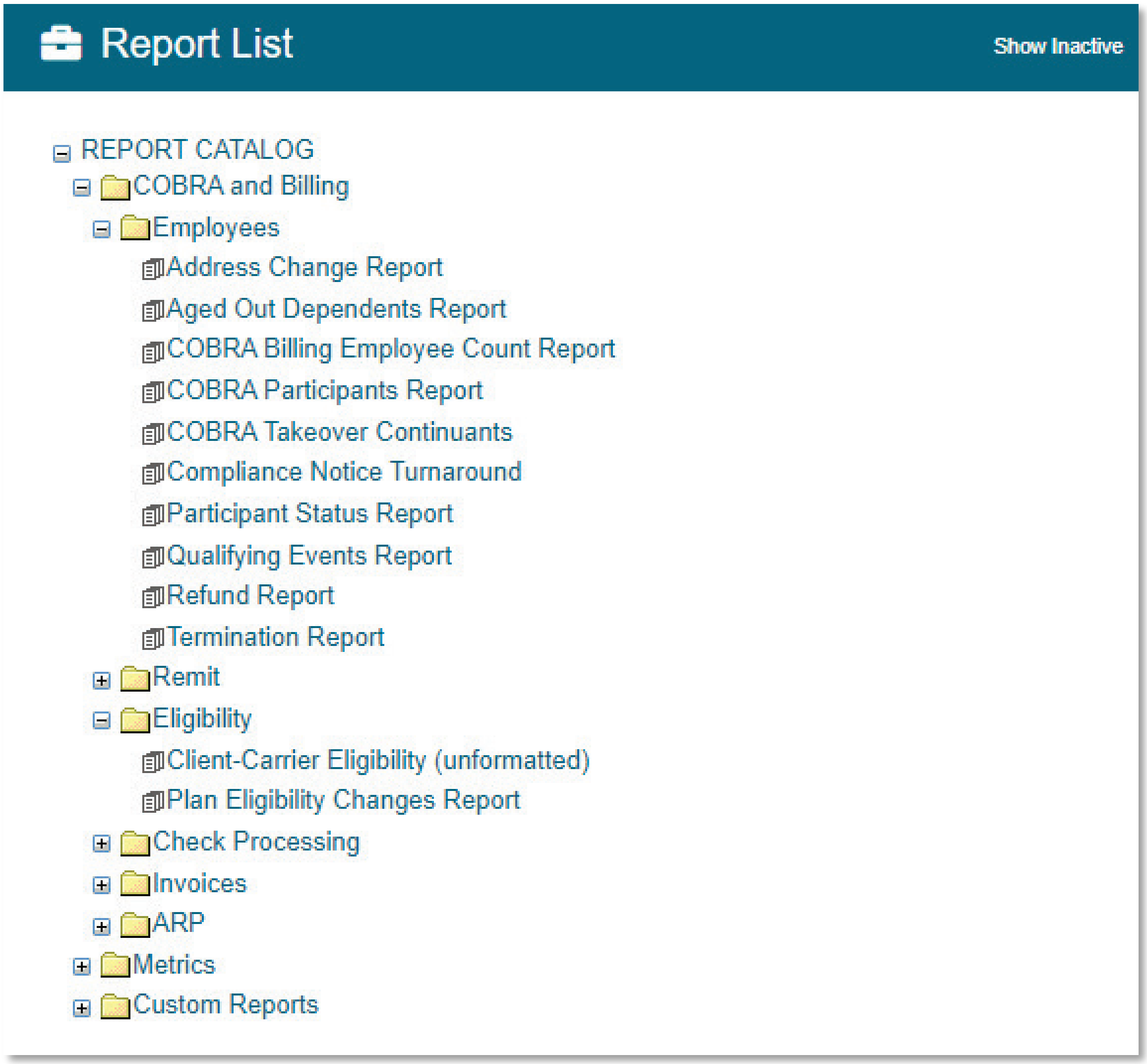
View	Coverage Period	Premium	Previously Paid	Amount Due	Due Date	Grace Period End Date	Type
View	04/01/2022 - 04/30/2022	$100.00	$0.00	$100.00	4/1/2022	4/30/2022	COBRA Coverage
View	03/01/2022 - 03/31/2022	$100.00	$50.00	$50.00	3/1/2022	3/31/2022	COBRA Coverage
View	02/01/2022 - 02/28/2022	$100.00	$50.00	$50.00	2/1/2022	2/28/2022	COBRA Coverage

Reports

We offer a suite of reports to help you manage your COBRA and Billing Services programs. To access the reports, click on Reports in the main menu, and then choose Report Catalog from the drop-down list.



In the Report List, open the COBRA and Billing folder. You will find the most popular reports in the Employees and Eligibility folders.



- REPORT CATALOG
  - COBRA and Billing
    - Employees
      - Address Change Report
      - Aged Out Dependents Report
      - COBRA Billing Employee Count Report
      - COBRA Participants Report
      - COBRA Takeover Continuants
      - Compliance Notice Turnaround
      - Participant Status Report
      - Qualifying Events Report
      - Refund Report
      - Termination Report
    - Remit
    - Eligibility
      - Client-Carrier Eligibility (unformatted)
      - Plan Eligibility Changes Report
    - Check Processing
    - Invoices
    - ARP
  - Metrics
  - Custom Reports

The most commonly used reports are:

- **COBRA Participants Report**: The continuants report lists all COBRA continuants along with their SSN, name, address, DOB, coverage dates, and paid through date. You choose the date range for the report.
- **Qualifying Events Report**: The QE report lists all qualifying events and related information, including account number, name, status, date, type, and COBRA begin and end dates. You choose the date range for the report.
- **Termination Report**: The COBRA term report lists all employees terminated and includes their account number, name, plans, COBRA enrollment window dates, COBRA coverage dates, termination reason, and date. You choose the date range for the report.
- **Participant Status Report**: The participant status report lists individuals by their COBRA status: active COBRA participants, those in their election period, and those who have elected and are within their initial premium payment period.
- **Aged Out Dependents**: The aged-out dependents report lists all dependents who have aged out of plan coverage and are now eligible for COBRA coverage. The report includes the employee’s name and the dependent’s name and age. This is a “snapshot” report (it contains a “snapshot” of this information at the time you run the report).
- **Plan Eligibility Changes Report**: The outbound eligibility report lists all participants with an eligibility change. The report includes the participant’s name, SSN, plan ID, paid through date, and COBRA and coverage begin and end dates. You choose the date range for the report.

If you need help with any reports, please contact your client service team. They can also set up scheduled reports to make sure you receive the information you need when you need it.