



COBRA Employer Web Portal Tutorial

Introduction

We are excited to provide you with on-line access to your COBRA information through our COBRA Employer Portal! Please take some time to review this tutorial so you understand how to enter new information as well as to access important COBRA information for your company.

The Employer Portal is an important place for a number of reasons including:

1. Providing on-line information on new hires at your company who enroll in a COBRA eligible benefit so PacificSource Administrators can send out the Department of Labor (DOL) required Initial Notice.
 - On the portal, these members are referred to as **New Hires**.
2. Providing on-line information on any **COBRA qualifying events** you have at your company so PacificSource Administrators can send the COBRA Specific Rights Notice (also known by COBRA Election Packet).
 - On the portal, these members are referred to as “**QBs**” or **Qualified Beneficiaries**.
3. Accessing important **COBRA reports** to see information such as, but not limited to:
 - QB status, paid through dates, payment reconciliation, and paperwork that has been mailed.
4. Viewing specific **member’s accounts** to see information such as, but not limited to:
 - Payment history, printable copies of all paperwork sent to the member, plan information, dependents, and a timeline of the QB’s COBRA.

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Logging into the Portal for the First Time

- ✓ Proceed to the COBRA Web Log in screen, accessed by visiting:
 - <https://cobra.pacificsource.com>
 - Select the **New to PacificSource Administrators?** New User Registration link on the right side.

New to PacificSource Administrators?

NEW USER REGISTRATION

- ✓ You will be taken to this New Registration screen:

NEW USER >

1. REGISTRATION INFO
2. LICENSE AGREEMENT
3. CREATE ACCOUNT

New Registration

In order to register you will need the registration code assigned to you. If you are eligible a letter was sent to you via the United States Postal Service ®.

Registration Code

Required

SUBMIT REGISTRATION

CANCEL

- Enter the **Registration code** that you received from PacificSource Administrators (via email or by mail).
- **Note:** If possible, copy and paste your registration code to prevent entering code incorrectly.

- ✓ A second box will appear, requesting the Employer Identification Number (Tax ID Number):

NEW USER >

1. REGISTRATION INFO
2. LICENSE AGREEMENT
3. CREATE ACCOUNT

New Registration

In order to register you will need the registration code assigned to you. If you are eligible a letter was sent to you via the United States Postal Service ®.

Registration Code ✓ Company
Required

Employer Identification Number
Required

By entering the information requested above and by continuing this registration process, you certify that you are the named addressee of the letter which provided you with the registration code you entered on the previous page or a person legally authorized to act on behalf of the name addressee. Information contained in this website is confidential and may be subject to protection under the law, including the Health Insurance Portability and Accountability Act (HIPAA). If you are not the named addressee or authorized to act on behalf of this person, you are hereby notified that any further use of this website is strictly prohibited and may subject you to criminal or civil penalties.

- ✓ Accept the New User License Agreement

NEW USER >

- ✓ REGISTRATION INFO
2. LICENSE AGREEMENT
3. CREATE ACCOUNT

New User License Agreement

PLEASE READ THIS AGREEMENT CAREFULLY. IT GOVERNS YOUR ACCESS TO AND USE OF THE COBRAPoint website and the services and materials provided on the COBRAPoint Website (collectively "COBRAPoint").

NEW COBRAPoint User Agreement PRINT

WEX HEALTH CLOUD USER AGREEMENT

PLEASE READ THIS AGREEMENT CAREFULLY. IT GOVERNS YOUR ACCESS TO AND USE OF THE WEX Health Cloud The Application website and the services and materials provided on the WEX Health Cloud Application (collectively, the "Application").

BY SELECTING "I ACCEPT" OR BY ACCESSING THE APPLICATION, YOU AGREE TO THE TERMS, CONDITIONS AND LIMITATIONS OF THIS AGREEMENT. IF YOU DO NOT AGREE TO BE BOUND BY ALL OF THESE TERMS, CONDITIONS AND LIMITATIONS OF THIS AGREEMENT, YOU MUST PROMPTLY CEASE ALL USE OF THE APPLICATION.

I Accept

BY SELECTING "I ACCEPT" OR BY ACCESSING COBRAPoint, YOU AGREE TO THE TERMS, CONDITIONS AND LIMITATIONS OF THIS AGREEMENT. IF YOU DO NOT AGREE TO BE BOUND BY ALL OF THESE TERMS, CONDITIONS AND LIMITATIONS OF THIS AGREEMENT, YOU MUST PROMPTLY CEASE ALL USE OF COBRAPoint.

Required

- ✓ Complete your Portal Username & Password

NEW USER >

- ✓ REGISTRATION INFO
- ✓ LICENSE AGREEMENT
- 3. CREATE ACCOUNT

Portal Username and Password

Please choose a Username and Password to access the site.

Username:

New Password 
 ✓
Required

Confirm Password
 ✓
Required

- ✓ You are now ready to log into the portal. Enter your username & password. Checking the “Remember Me?” button will keep your Username filled in.

Enter Login Information

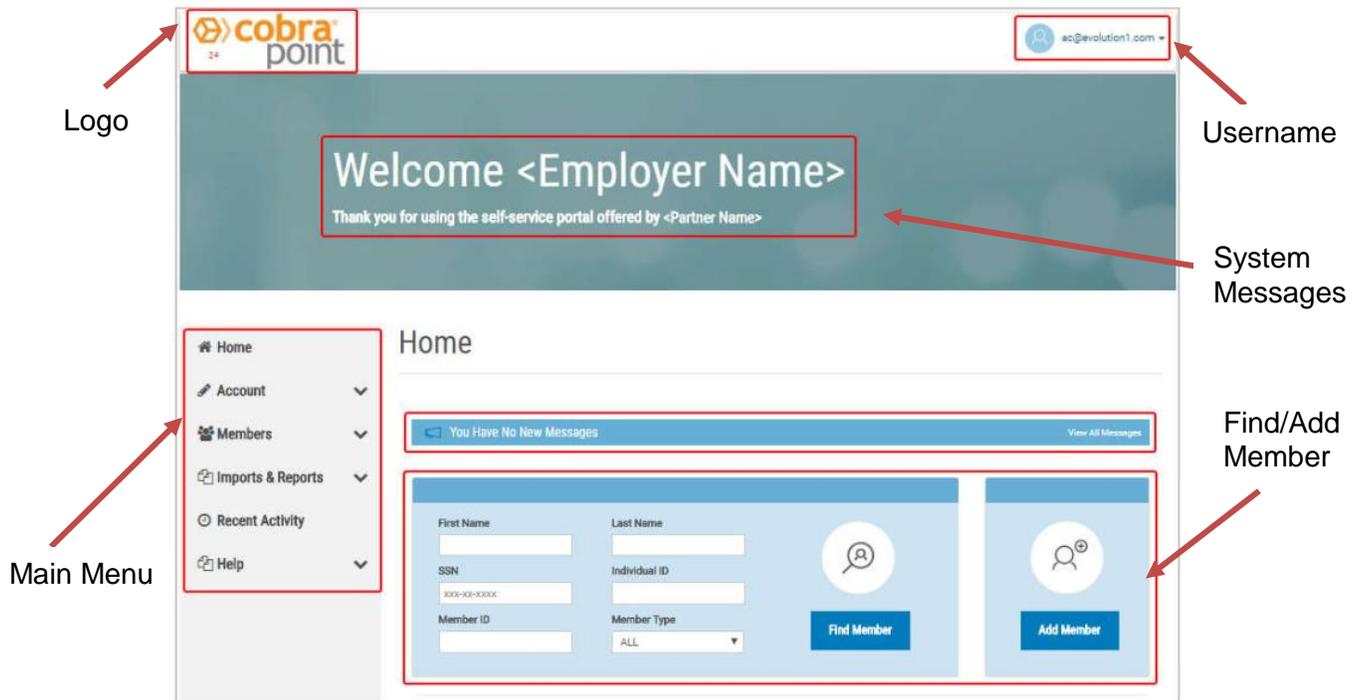
Username

Password

Remember me?

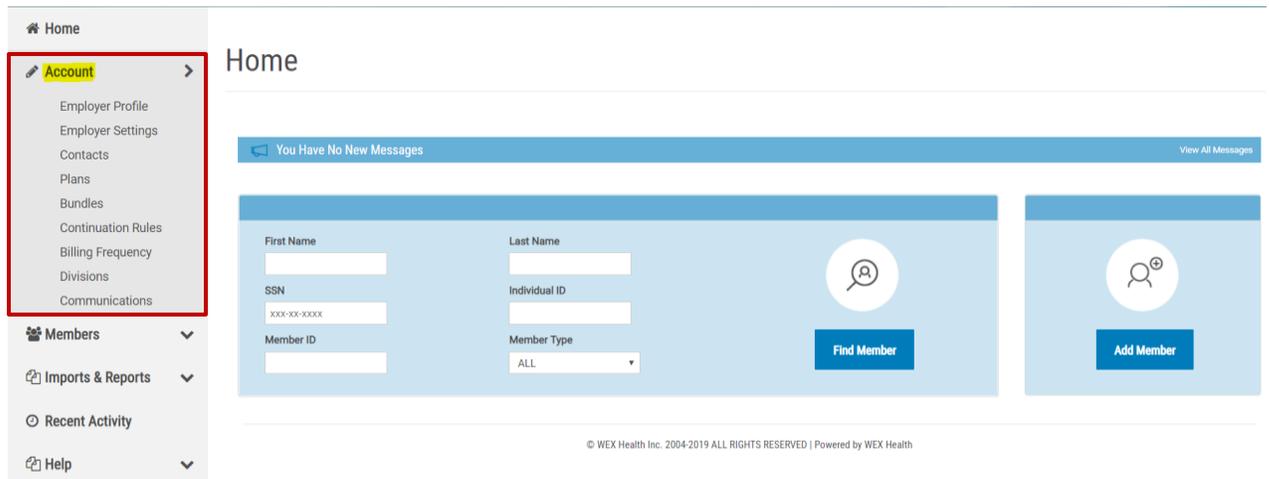
The Home Page

- ✓ Once logged in, you will see this home page:



- ✓ **Logo** – the Administrator logo is displayed in the upper left corner of the page; this is customizable for the Employer (Client) logo upon request.
- ✓ **Username** – the username is displayed in the upper right corner of the page; hover over the username to display the link to logout.
- ✓ **Main Menu** – this is a navigation menu along the left side of the screen. Clicking on a menu item will either expand or open a page in the portal.
- ✓ **System Messages** – these contain information on important events or announcements; they are displayed in the center portion of the page.
- ✓ **Find Member/Add Member** – these allow the user to locate an existing member record or add a new Qualified Beneficiary (QB), Direct Bill (Retiree), or New Hire Member. This is also displayed in the center of the Home Page.

Account Menu



- ✓ **Employer Profile** – contains the account information, the Edit link in the page opens a dialog box to edit the employer contact information.
- ✓ **Employer Settings** – allows the user to view details of the configuration, with categories underneath; this is view-only for employers, to make changes please contact PSA COBRA.
- ✓ **Contacts** – lists the individual system users; clicking next to the Type name for an entry will expand the entry to show additional details; Add a New Contact will allow the user to create a new contact. Clicking the Edit link will allow a user to edit an existing contact's information.
- ✓ **Plans** – this page displays a listing of the insurance plans and carriers provided by the employer; QB and Direct Bill plans are listed separately. Clicking next to the plan name link will open the Plan Detail Page, and contains the link to view rates. This is view only for employers, to make changes please contact PSA COBRA.
- ✓ **Bundles** – this page displays a listing of the insurance plans and carriers provided by the employer as bundled plans (the plans must all be selected together); QB and Direct Bill plans are listed separately. Clicking next to the plan name link will open the Plan Detail Page, and contains the link to view rates. This is view only for employers, to make changes please contact PSA COBRA.
- ✓ **Continuation Rules** – continuation rules show the coverage period, election time frames, payment grace periods, and letter inserts. This is view only for employers, to make changes please contact PSA COBRA.
- ✓ **Divisions** – this is a listing of the administrative or operating units of the employer. There are profile pages within the divisions, including contact information, plans & bundles, and communications. This is view only for employers, to make changes please contact PSA COBRA.
- ✓ **Communications** – this section displays a reverse-chronological list of all letters that have been sent to the employer by the system.

Members

Users can use the **Add Members** option or the **Find Members** options to locate an existing member in the database.

Member types:

- **Qualified Beneficiary** – an individual who has lost group health plan coverage due to a qualifying event such as a termination or loss of eligibility.
- **Direct Bill** –an individual who is billed on a regular schedule for one or more plans or benefits; usually a retiree.
- **New Hire** –an individual who is a current employee (or family member), newly enrolled on benefits for the first time, and not receiving COBRA benefits.

Adding Members – From the **Add Member** page, users can add a new member record to the system.

- ✓ The Choose Member Type to Add section provides a description of each member type. Only the member types enabled for the employer will be displayed.
- ✓ Click the Next button for a member type to begin the process of adding the member.

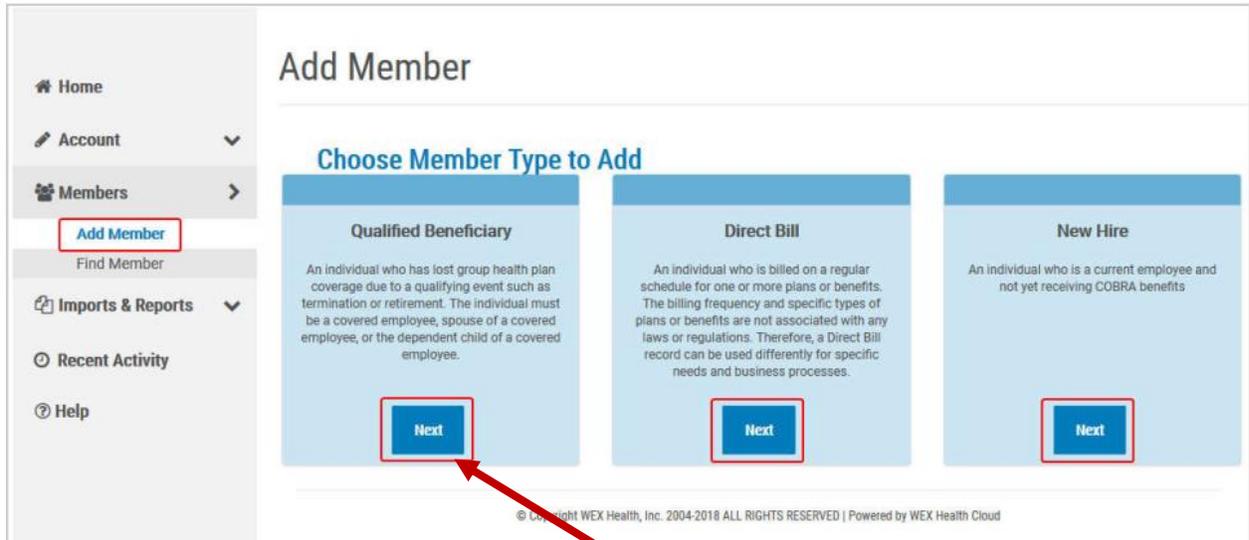
Home

You Have No New Messages [View All Messages](#)

First Name <input type="text"/>	Last Name <input type="text"/>	
SSN <input type="text"/>	Individual ID <input type="text"/>	
Member ID <input type="text"/>	Member Type ALL	
<input type="button" value="Find Member"/>		<input type="button" value="Add Member"/>

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Adding Qualified Beneficiary Members



Add a Qualified Beneficiary Member: Clicking the **Next** button within the Qualified Beneficiary section begins the process of adding a new Qualified Beneficiary Member. Steps are completed on a series of individual pages linked together in sequence. As each page is completed, a **Next** or **Save & Continue** button is displayed. When the final step is reached, an **Add Member** button is displayed. At any time, the user can go back one or more steps to change a previous decision, using the **Previous** button. Clicking **Cancel** will exit the process at any time without saving the record.

Fields marked with the **red asterisk** are required.

The steps are as follows:

- ✓ Enter the profile information
- ✓ Enter employee information
- ✓ Enter plan information
- ✓ Enter dependents
- ✓ Enter subsidy information (employer-paid portion of the COBRA premiums)
- ✓ Letter inserts as applicable
- ✓ Letter attachments as applicable

Enter the Profile Information:

Enter Profile Information Step 1 of 7

Employer Name: Dans Restaurant 12345 Division: * Choose... ▼

Salutation Choose... ▼	Phone (xxx) xxx-xxxx
First Name *	Phone 2 (xxx) xxx-xxxx
Middle Initial	Email
Last Name *	SSN * xxx-xx-xxxx
Address *	Individual Identifier
Address 2	Gender * Choose... ▼
City *	Date of Birth * mm/dd/yyyy
State *	Benefit Group
Zip *	Account Structure
Country	Employer Custom Data

[Cancel](#) [→ Next](#)

Enter Employee Information:

Enter Employee Information Step 2 of 7

Tobacco Use * Unknown ▼	Event Category * <input checked="" type="radio"/> Employee ? <input type="radio"/> Dependent ?
Employee Type * Full-Time Employee ▼	Event Type * Termination ▼
Payroll Type * Hourly ▼	Event Date * 09/25/2018
Years of Service	Date of Hire/Enrollment Date * 01/01/2018
Premium Coupon Type * Coupon Book ▼	

Has this member already been offered COBRA? *
 Yes
 No

[Cancel](#) [← Previous](#) [→ Save & Continue](#)

Enter Plan Information:

Click **+ Add Plan** to open the pop-up window to add the plan information.

Enter Plan Information Step 3 of 7

+ Add Plan

Plans

Plan Name	Start Date	End Date	Coverage Level	Rate
No data to display				

Bundles

Bundle Name	Start Date	End Date	Coverage Level	Rate
No data to display				

Cancel

← Previous → Save & Continue

Add Plan ✕

Plan
 Bundle

Plan is required
Plan *

Choose... ▾

Coverage Level *

Choose... ▾

Select the plan from the dropdown menu, more fields will appear to complete.

Add Plan ✕

Plan
 Bundle

Plan *
PacificSource Medical Stand Alone ▼

Coverage Level *
Choose... ▼

PLAN COVERAGE INFORMATION

18 Months of Coverage *
60 Days to Elect *
45 Days to Make 1st Payment *
30 Days to Make Subsequent Payments *

COVERAGE PERIOD Editing this date changes the First and Last day of Coverage

First Day of Coverage: *
10/01/2018 ✕ 📅

Last Day of Coverage:
03/31/2020

✕ Cancel ✓ Save

Select the coverage level from the drop-down menu.

Confirm the Coverage Period, the First Day of Coverage, then click Save.

Repeat the **+ Add Plan** steps with each plan and coverage level.

Click **Save & Continue** when finished adding plans.

Add Dependents (as applicable):

Click the **+Add Dependent Dependents** Step 4 of 7 button to bring up the menu to add dependents to be offered COBRA.

 **+ Add Dependent**

Name	Relationship	Date of Birth	SSN	Gender
No data to display				

Cancel

← Previous

→ Save & Continue

Add Dependent

Relationship *

Choose...

Qualified Medical Child Support Order (QMCSO)

Salutation

First Name *

Middle Initial

Last Name *

SSN

Date of Birth

Gender

Enrollment Date

Plan Start Date *

Address same as Qualified Beneficiary

Address *

23345 S North St

Address 2

City *

City

State *

State

Zip *

23445

Country

Phone

(xxx) xxx-xxxx

Phone 2

(xxx) xxx-xxxx

Email

✖ Cancel Save

Complete the fields with the **Red ***.

The address information will default to be the same as the Qualified Beneficiary.

When you select the Relationship, additional fields will open at the bottom of the window to add the plans for the dependent. Check the appropriate plans and then [Add Selected Dependent Plans](#). Then click Save.

AVAILABLE DEPENDENT PLAN(S)

<input type="checkbox"/> Deselect All	Plan Name	Start Date	End Date	Plan Type
<input checked="" type="checkbox"/>	PacificSource Medical Stand Alone	10/01/2018	03/31/2020	Medical

[ADD SELECTED DEPENDENT PLAN\(S\)](#)

ADDED DEPENDENT PLAN(S)

Plan Name	Start Date	End Date	Plan Type
No data to display			

Once all dependents and dependent plans have been added, click [Save & Continue](#).

Subsidies:

Subsidies are employer-paid COBRA premiums, often part of a severance agreement.

Click the **+Add Subsidy Schedule** to open the window to add the subsidy.

Subsidies Step 5 of 7

+ Add Subsidy Schedule

Start Date	End Date	Plan Type	Subsidy Type	Subsidy Amount Type	Amount
No data to display					

Cancel ← Previous → Save & Continue

If a subsidy applies, fill in the plan type, the expiration date, and the amount (either a flat amount or a percentage). Then click **Add**.

Add Subsidy Schedule

Subsidy Schedule Start: * 10/02/2018

Subsidy Schedule End: * 10/02/2018

Subsidy Schedule Type: * Employer Subsidy

Subsidy Schedule Amount Type: * Percentage

Plan Type: * Medical

Amount: * 0.00%

When all subsidies have been added, click **Save & Continue** to move to the next screen. If there are no subsidies, this section can be skipped by clicking the **Save & Continue** button.

Letter Inserts: If the employee worked in one of the states listed on the screen, select the letter corresponding to that state. These are state specific letters to be added to the standard COBRA notice. Then click **Save & Continue**.

Letter Inserts Step 6 of 7

- California Specific Rights Letter Insert
- Commonwealth of VA Continuation
- Connecticut Specific Rights Letter Insert
- Georgia State Continuation
- Illinois State Continuation
- Minnesota Continuation Specific Rights Insert
- Minnesota Life Specific Rights Letter Insert
- New York State Continuation
- Oregon Specific Rights Letter Insert
- Rhode Island State Continuation
- Texas Specific Rights Letter Insert
- VEBA Specific Rights Letter Insert

[Cancel](#)

[← Previous](#)

[→ Save & Continue](#)

Letter Attachments: This screen will list any letters to be added to the COBRA notice. Click **Add Member**.

Letter Attachments Step 7 of 7

Attach Name

No data to display

[Cancel](#)

[← Previous](#)

[→ Add Member](#)

Adding Direct Bill Members

The screenshot shows the 'Add Member' interface. On the left is a navigation sidebar with options: Home, Account, Members (with a sub-menu containing 'Add Member' and 'Find Member'), Imports & Reports, Recent Activity, and Help. The main content area is titled 'Add Member' and 'Choose Member Type to Add'. It features three cards: 'Qualified Beneficiary', 'Direct Bill', and 'New Hire'. Each card has a 'Next' button. A red box highlights the 'Add Member' button in the sidebar and the 'Next' button in the 'Direct Bill' card. A red arrow points from the 'Next' button in the 'Direct Bill' card towards the text below.

Add a Direct Bill Member: Clicking the **Next** button within the Direct Bill section begins the process of adding a new Direct Bill Member. Steps are completed on a series of individual pages linked together in sequence. As each page is completed, a **Next** or **Save & Continue** button is displayed. When the final step is reached, an **Add Member** button is displayed. At any time, the user can go back one or more steps to change a previous decision, using the **Previous** button. Clicking **Cancel** will exit the process at any time without saving the record.

A **Direct Bill Member** is commonly a Retiree, and would only apply if the company offers Retiree benefits. Direct Bill Members were formerly known as a “Special Plan Member”.

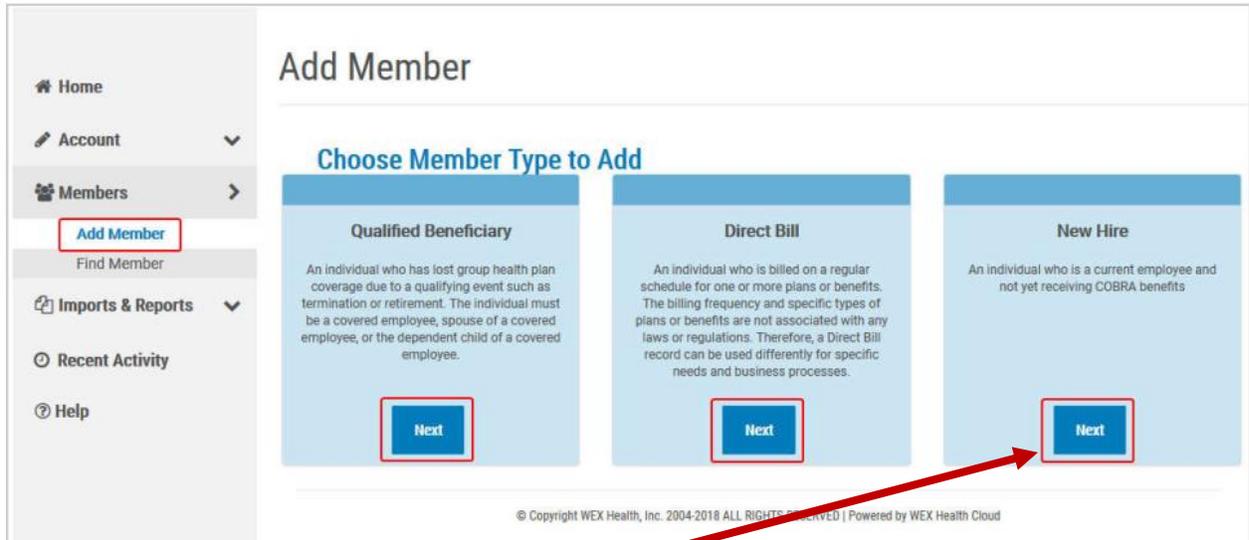
Fields marked with the **red asterisk** are required.

The steps are as follows:

- ✓ Enter the profile information
- ✓ Enter employee information
- ✓ Enter plan information
- ✓ Enter dependents
- ✓ Enter subsidy information (employer-paid portion of the COBRA premiums)
- ✓ Letter attachments as applicable

The steps are similar to adding a new Qualified Beneficiary, and follow the same order.

Adding New Hire Members



Add a New Hire: Clicking the **Next** button within the New Hire section begins the process of adding a New Hire Member. This is a one-step process. Complete the Profile Information and click **Add Member**. Clicking **Cancel** will exit the process at any time without saving the record.

Fields marked with the **red asterisk** are required.

Enter the New Hire information:

Enter Profile Information Step 1 of 1

Employer Name: Dans Restaurant 12345 Division: Choose...

Salutation Choose...	Phone (xxx) xxx-xxxx
First Name *	Phone 2 (xxx) xxx-xxxx
Middle Initial	Email
Last Name *	Address *
SSN *	Address 2
Individual Identifier	City *
Gender *	State *
Hire Date mm/dd/yyyy	Zip *
<input type="checkbox"/> Has waived all coverage	Country
<input checked="" type="checkbox"/> Send General Rights letter when finished	<input checked="" type="checkbox"/> Use % Family Addressing for mailings
	<input type="checkbox"/> Do you want to enter HIPAA Certification information?

Cancel → Add Member

Viewing Member Accounts

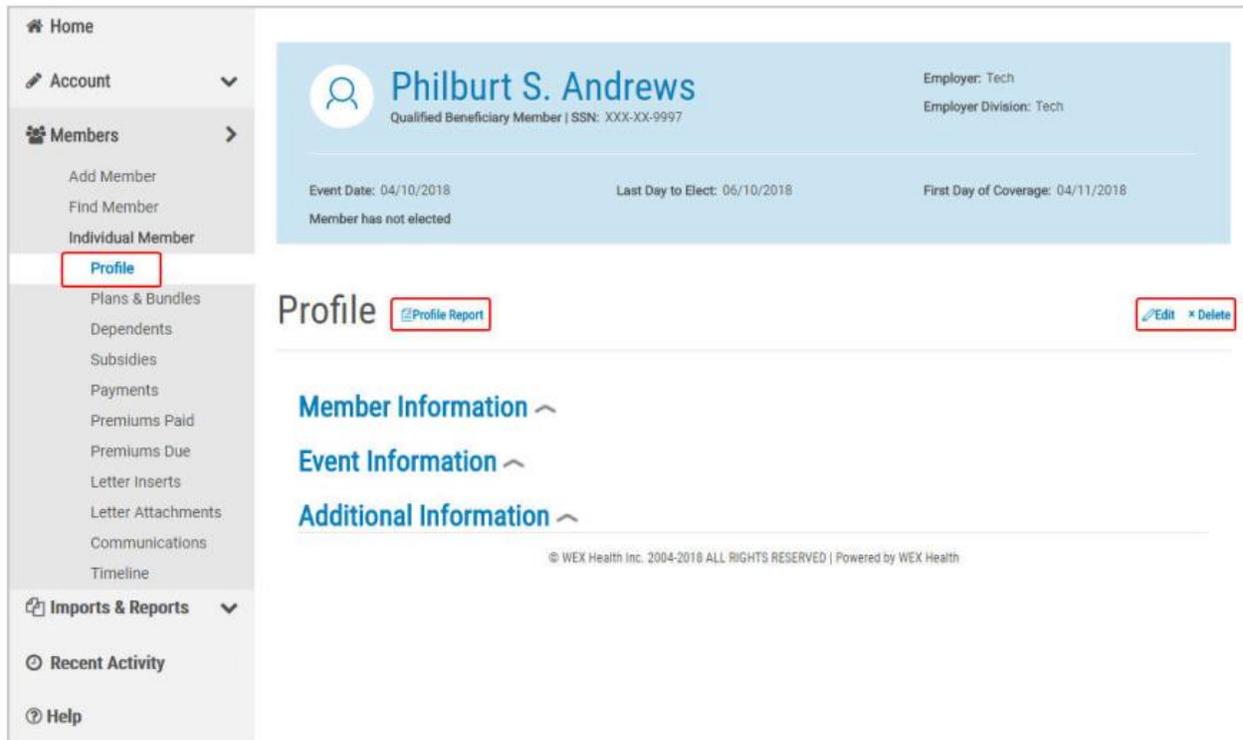
Find Members – From the Find Member page, users can:

- ✓ Use the Member's first name, last name, SSN, individual ID or member ID as search criteria to locate a specific member record.
- ✓ Use the Member Type drop-down menu to locate all members in the system or narrow the search to a specific member type (Qualified Beneficiary, Direct Bill, or New Hire). Only the member types enabled for the Employer will be displayed in the drop-down menu.

The screenshot shows the 'Find Member' interface. On the left is a navigation sidebar with options: Home, Account, Members (with sub-options 'Add Member' and 'Find Member'), Imports & Reports, Recent Activity, and Help. The main area is titled 'Find Member' and contains search fields for First Name (containing 'test'), Last Name, SSN (containing 'XXX-XX-XXXX'), Member ID, Member Type (a dropdown menu set to 'ALL'), and Individual ID. A blue 'Find Member' button is on the right. Below the search fields is a table of results. The table has columns for Member Type, Name, Member Id, and SSN. One result is shown: a Qualified Beneficiary with the name 'Add Plan, Test', Member Id '111924', and SSN 'XXX-XX-4321'. A 'Show 10 entries' dropdown is located above the table. Red boxes highlight the 'Find Member' button in the search area and the 'Add Plan, Test' link in the results table.

Member Type	Name	Member Id	SSN
> Qualified Beneficiary	Add Plan, Test	111924	XXX-XX-4321

After entering search criteria & clicking the **Find Member** button, search results are displayed within the lower half of the page. Clicking a column header allows users to sort search results; Clicking on the **Name** link opens the corresponding member's **Profile** page.



Qualified Beneficiary Member Profile: The **Profile** page is displayed by default. The information is grouped in three sections, **Member Information**, **Event Information**, and **Additional Information**. Clicking a section heading will expand that section to view the contents. Clicking the **Profile Report** link will create a summary report of the member's profile information. The **Edit & Delete** buttons will allow the user to edit or delete the information. These are only available when the record is newly entered and the Specific Rights Notice has not been processed yet.

Note: Direct Bill Member Profile & information is similar to the Qualified Beneficiary Member information.

Plans & Bundles: The **Plans & Bundles** page contains a listing of the insurance plans and plan bundles the member has elected. Clicking next to the plan or bundle name will expand the plan or bundle to display additional details & status.

Home

Account ▾

Members ▸

- Add Member
- Find Member
- Individual Member
 - Profile
 - Plans & Bundles**
 - Dependents
 - Subsidies
 - Payments
 - Premiums Paid
 - Premiums Due
 - Letter Inserts
 - Letter Attachments
 - Communications
 - Timeline

Imports & Reports ▾

Recent Activity

Help ▾

Philburt S. Andrews
 Qualified Beneficiary Member | SSN: XXX-XX-9997

Employer: Tech
 Employer Division: Tec

Event Date: 04/10/2018 Last Day to Elect: 06/10/2018 First Day of Coverage:

Member has not elected

Plans & Bundles

[+ Add Plan](#)

Plans

MEDICAL

Plan Name	Start Date	End Date	Coverage Level	Rate
> Anthem Cure-All Medical	04/11/2018	10/10/2019	QB Only	\$56.00

Bundles

Bundle Name	Start Date	End Date	Coverage Level	Rate
> SKN Bundle	05/01/2018	10/31/2019	EE Only	\$35.20
> Unit-Non-Unit Bundle	04/11/2018	10/10/2019	QB Only	\$1.00

Dependents: The **Dependents Page** displays a list of the member's dependents. Clicking next to a dependent's name will expand the entry to show additional details about the dependent and plans.

The screenshot displays the 'Dependents' page for member Ralph Brown. The left sidebar contains navigation options: Home, Account, Members (with sub-options: Add Member, Find Member, Individual Member, Profile, Plans & Bundles, **Dependents**, Subsidies, Payments, Premiums Paid, Premiums Due, Letter Inserts, Letter Attachments, Communications, Timeline), Imports & Reports, Recent Activity, and Help. The main content area shows the member's profile: Ralph Brown, Qualified Beneficiary Member | SSN: XXX-XX-2221, Employer: Tech, Employer Division: Tech. Below the profile, there are dates: Event Date: 04/03/2018, Last Day to Elect: 06/03/2018, and First Day of Coverage: 04/04/2018. A note states 'Member has not elected'. The 'Dependents' section features a '+ Add Dependent' button and a table with the following data:

Name	Relationship	Date of Birth	SSN	Gender
> Brown, Andrea	Spouse	05/18/1980	111-11-1112	F

Showing 1 to 1 of 1 entries

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Employer Subsidies: Subsidies are when a member's premium is paid by a third party, either in part or in full for a period of time. This is often part of a termination or severance agreement.

The screenshot shows a user interface for a member's profile. On the left is a navigation menu with items: Home, Account, Members, Subsidies (highlighted with a red box), Payments, Premiums Paid, Premiums Due, Letter Inserts, Letter Attachments, Communications, Timeline, Imports & Reports, Recent Activity, and Help. The main content area shows the profile for **Ralph Brown**, a Qualified Beneficiary Member with SSN: XXX-XX-2221. His employer is Tech, and his employer division is Tech. Key dates include Event Date: 04/03/2018, Last Day to Elect: 06/03/2018, and First Day of Coverage: 04/04/2018. A note states "Member has not elected". Below the profile is a section titled "Subsidies" with a red box around the "+ Add Subsidy Schedule" button. A table lists one subsidy entry:

Start Date	End Date	Plan Type	Subsidy Type	Subsidy Amount Type	Amount
04/19/2018	06/19/2018	Medical	Employer Subsidy	Percentage	5.00%

Below the table, it says "Showing 1 to 1 of 1 entries". At the bottom of the page, there is a copyright notice: "© WEX Health Inc. 2004-2018 ALL RIGHTS RESERVED | Powered by WEX Health".

Payments: The **Payments** page contains a listing of payments posted to the member's account. Clicking next to a payment will expand the entry to show the details of the payment.

The screenshot displays the member portal interface for Ralph Brown. On the left is a navigation sidebar with options like Home, Account, Members, Imports & Reports, Recent Activity, and Help. The 'Payments' option is highlighted with a red box. The main content area shows the member's profile information, including name, SSN, and employer details. Below this is a 'Payments' section with a table listing payment entries. One entry is expanded to show details.

Date/Time Entered	Payment Amount	Unallocated Amount	Voided
04/02/2018 02:10 PM	\$200.00	\$46.61	x

Expanded entry details:

- Postmark Date: 04/02/2018
- Payment Method: Check
- Check Number: 1111

Showing 1 to 1 of 1 entries

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Premiums Paid: this lists a summary of the member's paid premiums. This is the amount the member is billed and must pay to keep coverage active. Clicking next to an entry on the list will expand the information to show additional details.

The screenshot displays a user interface for a member's account. On the left is a navigation sidebar with options: Home, Account, Members (with sub-options: Add Member, Find Member, Individual Member Profile, Plans & Bundles, Dependents, Subsidies, Payments, Premiums Paid, Premiums Due, Letter Inserts, Letter Attachments, Communications, Timeline), Imports & Reports, Recent Activity, and Help. The main content area shows the member's profile for **Ralph Brown**, a Qualified Beneficiary Member with SSN: XXX-XX-2221, employed by Tech. Key dates include Event Date: 04/03/2018, Last Day to Elect: 06/03/2018, and First Day of Coverage: 04/04/2018. Below this is a section titled **Premiums Paid** with a table showing one entry for March 1 2018. The table has columns for Billing Period, Premium, Admin Fee, Subsidy, and Paid. A 'Showing 1 to 1 of 1 entries' message is displayed below the table. A footer contains the copyright notice: © WEX Health Inc. 2004-2018 ALL RIGHTS RESERVED | Powered by WEX Health.

Billing Period	Premium	Admin Fee	Subsidy	Paid
▼ March 1 2018	\$150.85	\$0.00	\$0.00	\$153.39

Premiums Due: this page lists the upcoming unpaid premiums through the end of the COBRA coverage.

The screenshot shows a user interface for a member named Ralph Brown. The left sidebar contains navigation options: Home, Account, Members (with sub-options: Add Member, Find Member, Individual Member, Profile, Plans & Bundles, Dependents, Subsidies, Payments, Premiums Paid, Premiums Due, Letter Inserts, Letter Attachments, Communications, Timeline), Imports & Reports, Recent Activity, and Help. The 'Premiums Due' option is highlighted with a red box. The main content area displays the member's profile information: Ralph Brown, Qualified Beneficiary Member | SSN: XXX-XX-2221, Employer: Tech, and Employer Division: Tech. Below this, key dates are listed: Event Date: 04/03/2018, Last Day to Elect: 06/03/2018, and First Day of Coverage: 04/04/2018. The 'Premiums Due' section features a table with the following data:

Premium Due Date	Premium Amount	Subsidy	Total Owed
04/01/2018	\$153.39	\$8.10	\$145.29
05/01/2018	\$153.39	\$8.10	\$145.29
06/01/2018	\$153.39	\$8.10	\$145.29
07/01/2018	\$153.39	\$8.10	\$145.29

Letter Inserts: this contains a listing of the preexisting letter inserts that can be sent to the member; these are usually state-dependent and are included with the Specific Rights Notice sent to the member.

Letter Attachments: this contains a list of pre-existing letters attachments that can be sent to the member; these are usually state-dependent and are included with the Specific Rights Notice sent to the member.

Communications: this page contains lists all system-generated letters sent to the member. Clicking the link within the **Description** column will allow the user to open and download a PDF copy of the letter. Clicking the **Date/Time** column header will sort search results by the time stamp.

The screenshot displays a user interface for a member's account. On the left is a navigation sidebar with options: Home, Account, Members, Individual Member (Profile, Plans & Bundles, Dependents, Subsidies, Payments, Premiums Paid, Premiums Due, Letter Inserts, Letter Attachments), Communications (highlighted with a red box), Timeline, Imports & Reports, Recent Activity, and Help. The main content area shows the member's profile for Philburt S. Andrews, a Qualified Beneficiary Member with SSN XXX-XX-9997, employed by Tech. Key dates include Event Date: 04/10/2018, Last Day to Elect: 06/18/2018, and First Day of Coverage: 04/11/2018. Below the profile is a 'Communications' section titled 'Outgoing Mail' with a 'Show 10 entries' dropdown. A table lists one communication: a 'Letter' sent on '04/19/2018 / 12:02 AM' with the description 'COBRA Specific Rights Notice Letter' (highlighted with a red box). The footer contains the copyright notice: © WEX Health Inc. 2004-2018 ALL RIGHTS RESERVED | Powered by WEX Health.

Timeline: this contains a chronological summary of all important dates, plan dates, letters, notifications, payments, and subsidies associate with the member’s account.

Member Profile: Ralph Brown, Qualified Beneficiary Member | SSN: XXX-XX-2221
 Employer: Tech, Employer Division: Tech

Key Dates: Event Date: 04/03/2018, Last Day to Elect: 06/03/2018, First Day of Coverage: 04/04/2018
 Member has not elected

Timeline Filters: Include Dates, Include Letters, Include Payments, Include Plan Dates, Include Subsidies, Include Carrier Notifications, [Refresh](#)

Timeline Date	Category	Description	Additional Info
04/03/2018	Date	Qualifying Event	
04/04/2018	Plan	FDOC - First Day of COBRA	2 Insurance Type(s)
04/04/2018	Plan	Plan Start	2 Plan(s)
04/19/2018	Subsidy	Subsidy Start	1 Subsidy
04/19/2018	Date	OE Entered	
05/01/2018	Plan	Plan Start	1 Plan(s)
05/01/2018	Plan	FDOC - First Day of COBRA	1 Insurance Type(s)
06/19/2018	Subsidy	Subsidy End	1 Subsidy
04/03/2021	Plan	LDOC - Last Day of COBRA	2 Insurance Type(s)
04/03/2021	Plan	Plan End	2 Plan(s)

Showing 1 to 10 of 12 entries

Viewing Member Accounts

New Hire Member Information: The **Profile** page is displayed by default when opening a New Hire member record using the Find Member feature.

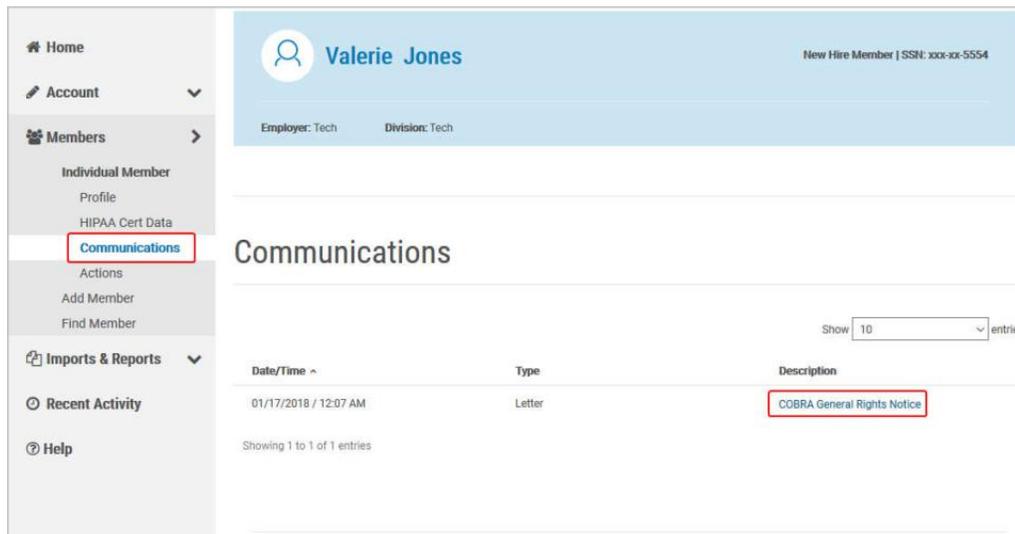
Profile: This allows users to view important information about the member. The information displayed within the **Member Information** section is the information provided when the member was entered.

The screenshot shows the 'Profile' page for Valerie Jones, a New Hire Member with SSN: xxx-xx-5554. The page is divided into a left sidebar and a main content area. The sidebar contains navigation options: Home, Account, Members, Individual Member (with sub-options: Profile, HIPAA Cert Data, Communications, Actions, Add Member, Find Member), Imports & Reports, Recent Activity, and Help. The main content area has a header with the member's name and SSN, and a 'Profile' section. Below this is the 'Member Information' section, which includes fields for Name, Phone, SSN, Gender, Phone 2, Individual Identifier, Mailing Address, Fax, and Hire Date. An 'Edit' link is visible next to the Member Information section. Below the Member Information section, there are three sections: 'Use & Family Addressing For Mailings:' (Yes), 'Has Become A QE:' (No), and 'Has Waived All Coverage:' (No).

HIPAA Certification Data: shown is the information entered initially. If this needs to be edited or added, clicking the **Edit** link allows a user to add information or edit the information.

The screenshot shows the 'HIPAA Cert Data' page for Valerie Jones, a New Hire Member with SSN: xxx-xx-5554. The page is divided into a left sidebar and a main content area. The sidebar contains navigation options: Home, Account, Members, Individual Member (with sub-options: Profile, HIPAA Cert Data, Communications, Actions, Add Member, Find Member), Imports & Reports, Recent Activity, and Help. The main content area has a header with the member's name and SSN, and a 'HIPAA Cert Data' section. Below this is the 'Original Enrollment Date:' (01/03/2018) and 'Last Day of Coverage:' fields, with an 'Edit' link. Below these is the 'Medical Plan:' (Cigna PPO Medical) and 'Coverage Level:' (EE Only) fields. Below the Medical Plan and Coverage Level fields is the 'Dependents' section, which includes a '+ Add a new dependent' link and a 'Refresh' link. Below the 'Dependents' section is a table with columns: Full Name, Relationship, Original Enrollment Date, and Last Day of Coverage. The table contains one entry: Ben Jones, Dependent Child, 01/03/2018. An 'Edit Delete' link is visible next to the entry. Below the table is the text 'Showing 1 to 1 of 1 entries'.

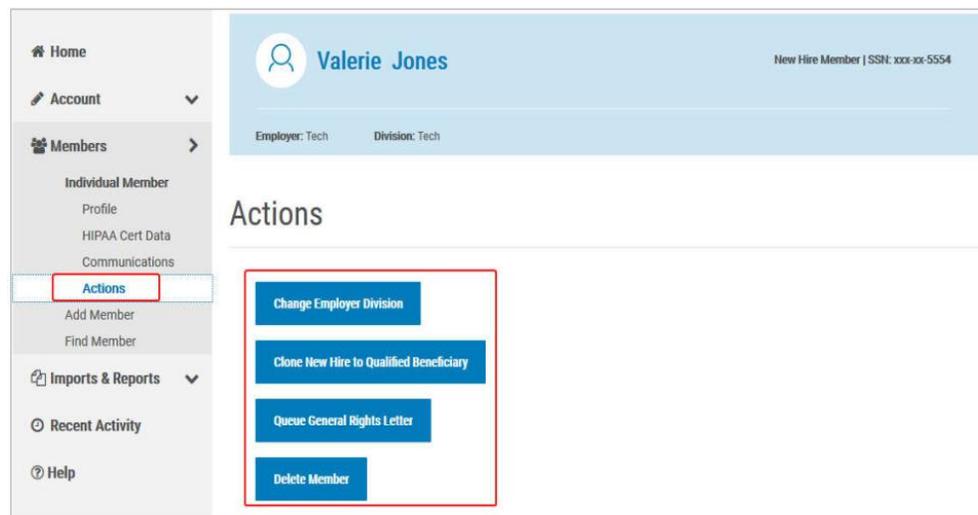
Communications: displays all communications sent to the member through the system. Clicking the link within the **Description** column opens a PDF of the communication. Clicking the **Date/Time** header allows the user to sort the letters by date/time.



Actions: from here, the user can take the following actions within the New Hire member record:

- ✓ Change the Employer Division
- ✓ Clone a New Hire Member to a Qualified Beneficiary member
- ✓ Queue the General Rights letter
- ✓ Delete a New Hire member record

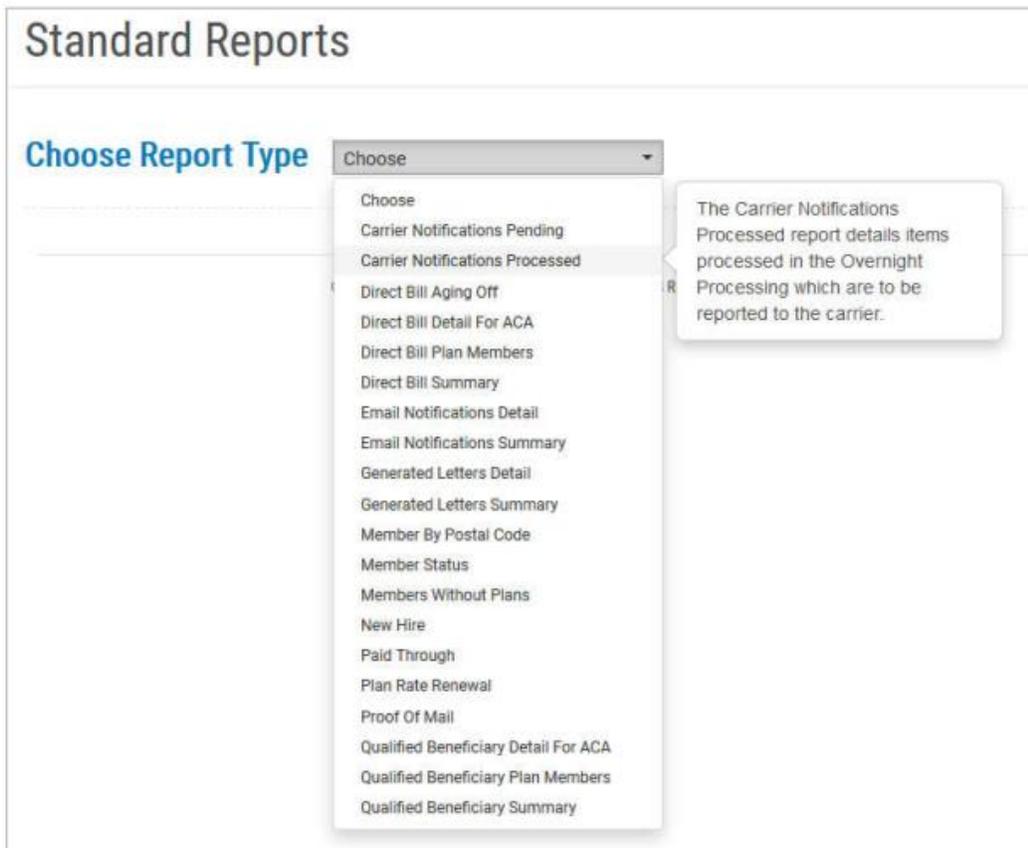
Clicking the button associated with the action will either open a dialog box or immediately initiate the action.



Reports

This menu allows the user to access Accounting Reports, Standard Reports, and the Job Queue.

Standard Reports: This option displays the list of several non-financial reports related to entities, members, plans, rates, & letters. The **Choose Report Type** is a drop-down menu containing a list of available accounting reports. Hovering over the report name displays a brief description of the report. Once a report is selected, the configurable details of the report are displayed within the body of the page.



Job Queue: This displays a list of system tasks. Tasks are separated into two sections – **Active Jobs & Scheduled Jobs**. It contains up to 45 days of content, anything older is automatically removed.

- ✓ **Active Jobs:** this includes manually processed letters, system reports, and pending refunds. Completed jobs also appear here, and can be downloaded in PDF format by clicking the **View** link within the **Download Results** column.
- ✓ **Scheduled Jobs:** this includes jobs that have been configured to run at a specific date & time. Once completed, the jobs will move to the **Active Jobs** section. Clicking the **Unschedule** link will cancel the scheduled job.

The screenshot shows the 'Job Queue' interface. On the left is a navigation sidebar with options: Home, Account, Members, Imports & Reports (with sub-items: Imports, Accounting Reports, Standard Reports), Job Queue (highlighted), Recent Activity, and Help. The main content area is titled 'Job Queue' and includes a 'Refresh' button. It is divided into two sections: 'Active Jobs' and 'Scheduled Jobs'.

Active Jobs Section: This section displays a table of completed jobs. The table has columns for Entered Date/Time, Category, Job Type, Started Date/Time, Completed Date/Time, Download Results, and Message. The first row is highlighted, and its 'View' link is circled in red. Below the table is a pagination control showing 'Showing 1 to 10 of 205 entries'.

Entered Date/Time	Category	Job Type	Started Date/Time	Completed Date/Time	Download Results	Message
> 05/02/2018 5:02 AM	Import	Import	05/02/2018 5:02 AM	05/02/2018 5:02 AM	View	Complete
> 05/02/2018 5:01 AM	Import	Import	05/02/2018 5:01 AM	05/02/2018 5:01 AM	View	Complete
> 05/02/2018 4:54 AM	Import	Import	05/02/2018 4:54 AM	05/02/2018 4:54 AM	View	Complete
> 05/02/2018 4:53 AM	Import	Import	05/02/2018 4:53 AM	05/02/2018 4:53 AM	View	Complete
> 05/02/2018 4:18 AM	Import	Import	05/02/2018 4:18 AM	05/02/2018 4:18 AM	View	Complete
> 05/02/2018 4:17 AM	Import	Import	05/02/2018 4:18 AM	05/02/2018 4:18 AM	View	Complete

Scheduled Jobs Section: This section displays a table of scheduled jobs. The table has columns for Job ID, Job Type, Schedule Name, Scheduled, and Scheduled By. The first row is highlighted, and its 'Unschedule' link is circled in red. Below the table is a pagination control showing 'Showing 1 to 1 of 1 entries'.

Job ID	Job Type	Schedule Name	Scheduled	Scheduled By
14768	Import		06/02/2018 9:45 AM	ac@evolution1.com

Recent Activity

Recent Activity: This is a listing of the member & entity records the viewer has most recently accessed. Records are grouped by type in different sections:

- ✓ Qualified Beneficiaries
- ✓ Direct Bill
- ✓ New Hire
- ✓ Employer Divisions
- ✓ Carriers

Clicking on the section heading will expand the section, displaying the most recently accessed records for that section:

- ✓ Clicking the **Member** link for a Qualified Beneficiary, Direct Bill, or New Hire member will open the member's **Profile** page;
- ✓ Clicking the **Employer Division** link will open that employer Division **Profile** page; and
- ✓ Clicking the **Employer** link will open the associated Employer **Profile** page.

The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar contains the following navigation items: Home, Account, Members, Imports & Reports, **Recent Activity** (highlighted with a red box), and Help. The main content area is titled "Recent Activity" and contains five expandable sections, each with a right-pointing chevron icon: "Most Recently Used Qualified Beneficiaries", "Most Recently Used Direct Bill Members", "Most Recently Used New Hire Members", "Most Recently Used Employer Divisions", and "Most Recently Used Carriers".