

COBRA & DIRECT BILLING EMPLOYER PORTAL QUICKSTART GUIDE



Welcome to Flex Administrators, Inc. COBRA & Direct Billing Employer Portal. This one-stop portal gives you the tools you need to better support your members in the management of their COBRA benefit plans.

The COBRA & Direct Billing Employer Portal is convenient and easy to use. Any-time access to the portal allows you to:

- Add members and member events
- View real-time individual participant account summary, plans, and payments
- View current and prior year plan information
- Retrieve reports generated by the employer
- Load data files
- Access communication history

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HOW DO I GET ACCESS TO THIS PORTAL?

1. You will be sent a New Client Login notice containing a registration code.
2. Navigate to cobra.flexadministrators.com and select **New User Registration**.
3. When going through New User Registration, you will be prompted to enter your registration code and company EIN, and then set up a password.
4. Once a password is created and confirmed, you will be automatically directed to your Home page.
5. For any subsequent logins, you will enter your username on the main login page and then enter your password on a secondary login page.

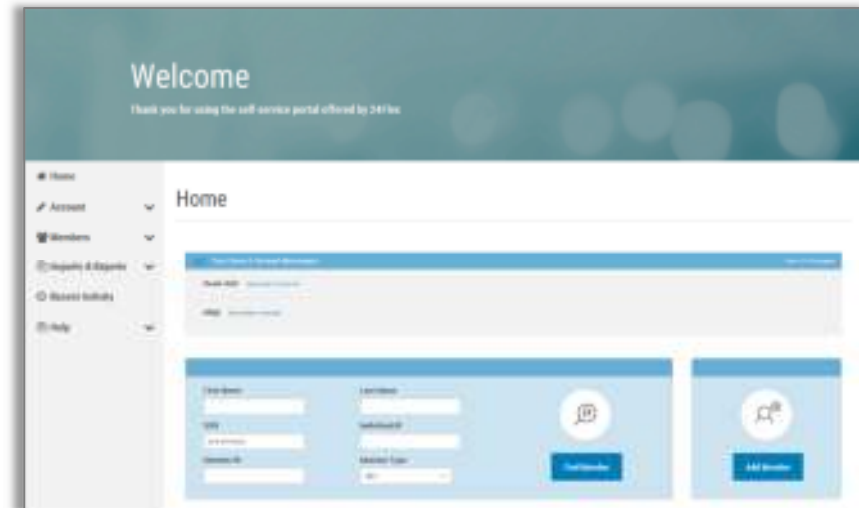


The **Home** page is easy to navigate:

Once you're logged in, everything you need to efficiently and effectively manage your COBRA accounts is found on the Home page. From the Home page, you can:

- Add a new member
- View member-level data
- Check the status of file imports
- View plan information
- Import files
- View communications

The options within the left navigation Main Menu will direct you to any action you need to take.



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HOW DO I ADD NEW MEMBERS?

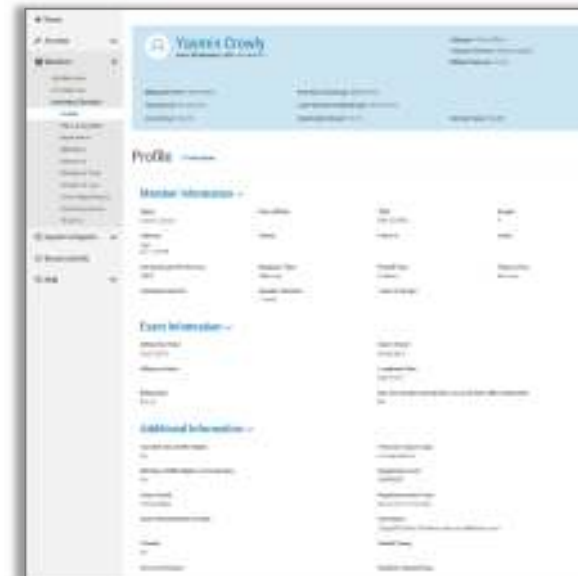
1. You can add a new member using the **Add Member** option available on the Home page or from the **Members** menu option.
2. Select the member type you'd like to add: Qualified Beneficiary, Direct Bill, or New Hire.
3. Click the **Next** button for the member type to begin the process of adding the new member.
4. Complete the required fields, marked with a red asterisk, and click **Next**.
5. Click **Save and Continue** to add new member information until you have completed all required steps.

The appropriate notification letter will be generated by the system and will automatically be sent to your administrator for printing and mailing.



WHAT KIND OF MEMBER-LEVEL DATA CAN I ACCESS?

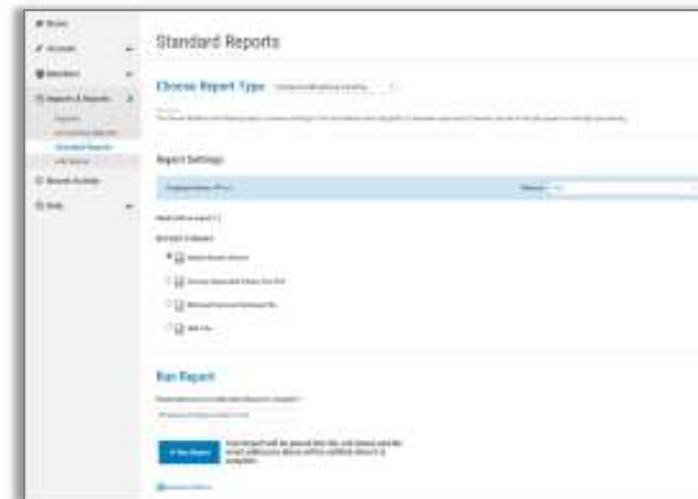
1. You can locate a member's record using the **Find Member** option available on the Home page or from the **Members** menu option.
2. You can search for members using first name, last name, SSN, Individual ID, Member ID, as well as Member Type.
3. Once in the member view, you can access the following information:
 - Demographics
 - Event Information
 - Payments
 - Plan Enrollments
 - Communications
 - Letter Attachments



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HOW DO I VIEW AND REQUEST REPORTS?

1. Select the **Imports & Reports** option to expand it and show the **Accounting Reports** and **Standard Reports** options.
2. After selecting either report option, you will be provided with a drop-down menu to choose which report you would like to generate.
3. Complete the required fields, marked with a red asterisk, and click the **Run Report** button.
4. The report will generate and be available in the **Job Queue**.
5. At the bottom of the page for the chosen report, you are also able to schedule a report for a given date and time, as well as allow the report to generate continuously on a schedule.



ONE OF THE FEATURES OF THE PORTAL IS THE ABILITY TO IMPORT DATA. HOW DOES THAT WORK?

1. Select the **Imports & Reports** option to expand it and show the **Imports** option.
2. After selecting the **Imports** option, you can import demographic, dependent, event, and plan information into the portal using standard CSV formatted import files.
3. **Import Specifications**, used in the creation of your import file, are available on the page.
4. Results will be available in the **Job Queue**.

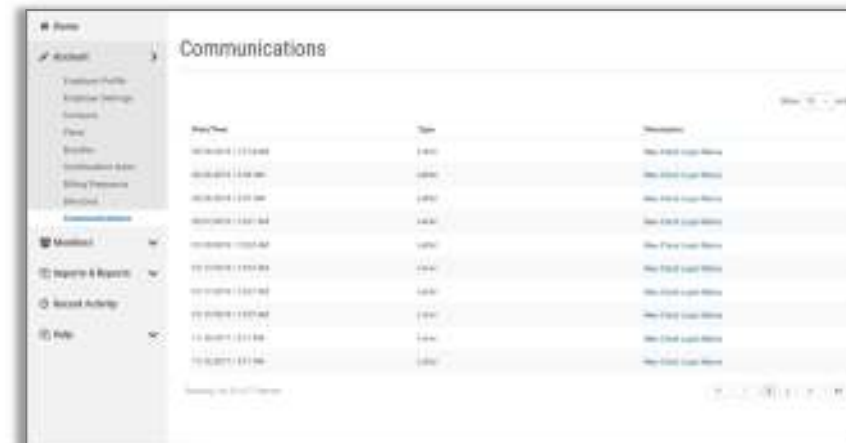


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HOW DO I VIEW COMMUNICATIONS AND MESSAGES?

1. Select the **Account** option to expand it and show the **Communications** option.

From the Communications page you can view the communications provided specifically for you. In addition, selecting the **Communications** option once you've located a member and are in the member view, allows you to view the communications provided for the member



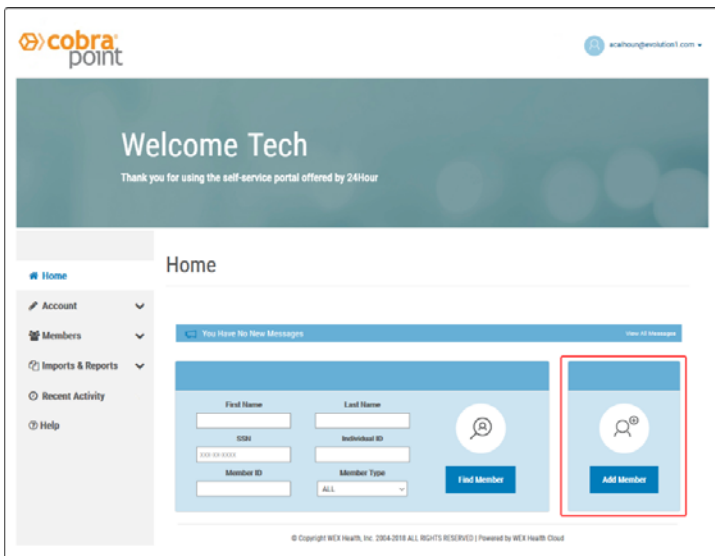
WILL I BE ABLE TO ACCESS ANY OF MY PLAN INFORMATION?

1. Select the **Account** option to expand it and show the **Plans** and **Bundles** options.
2. Selecting either option will display the plans or bundles for Qualified Beneficiary and Direct Bill members.
3. Information available includes:
 - Carrier Information
 - Rates
 - Plan Settings

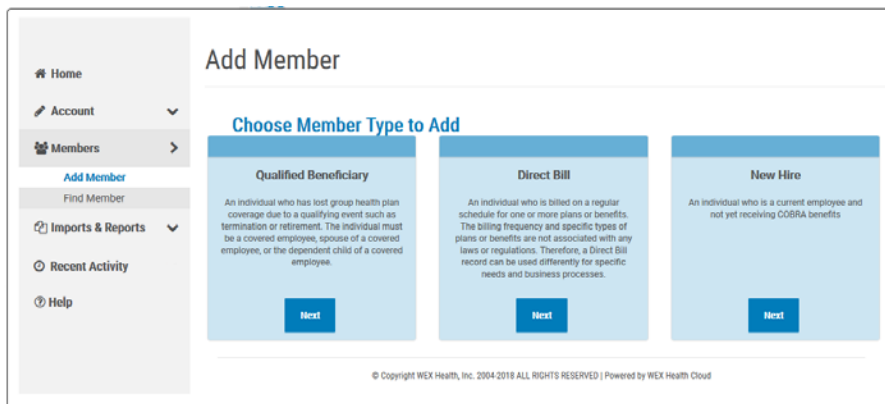


How to Enter a New Employee and Send an Initial Notice/General Rights Notice

1) Log into the portal and select ADD MEMBER



2) Select NEW HIRE

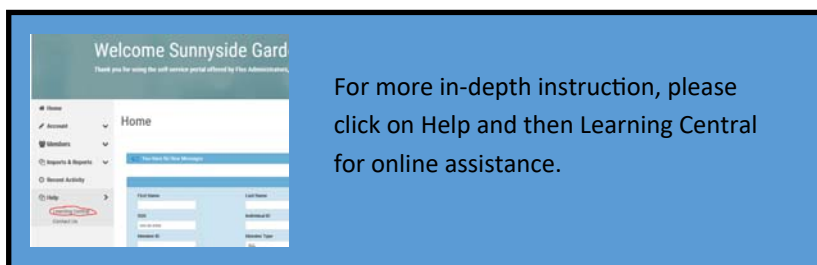
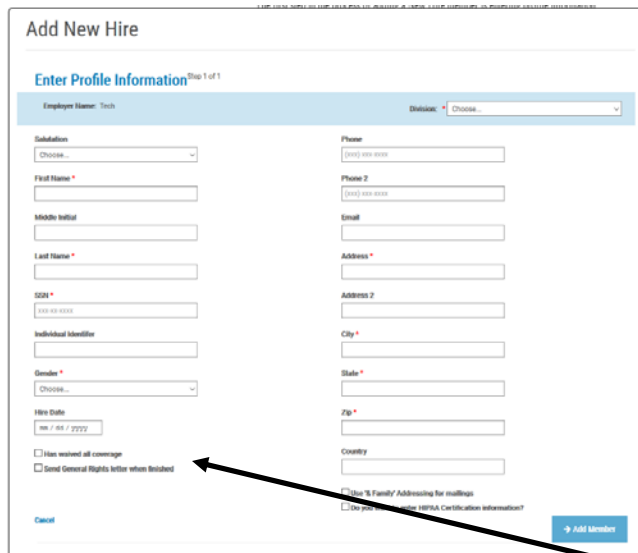


3) Enter Profile Information

Things to keep in mind:

If employee has Waived All Coverage an Initial Notice/General Rights Notice is not required and you also do not need to enter this employee into the system. Please hit CANCEL and do not enter this employee.

If this is a new employee who has elected Coverage you will want to check the box for SEND GENERAL RIGHTS LETTER WHEN FINISHED. This will trigger our system to mail out the Initial Notice/General Rights Notice the following day.



How to Enter a Qualifying Event in order to send COBRA Paperwork

Step 1) Add Member

Even if you have already sent this employee an Initial Notice/General Rights Notice you will still need to select ADD MEMBER in order to generate a COBRA Notice.

2) Select Qualified Beneficiary

3) Enter Profile Information

Add Qualified Beneficiary

Enter Employee Information Step 2 of 7

Tobacco Use *
Unknown

Employee Type *
Unknown

Payroll Type *
Unknown

Years of Service

Premium Coupon Type *
Premium Notice

Event Category *
 Employee
 Dependent

Event Type *
Choose...

Event Date *
MM / DD / YYYY

Date of Hire/Enrollment Date *
MM / DD / YYYY

Has this member already been offered COBRA? *
 Yes
 No

Cancel

4) Employer Employee Information

Tobacco Use: Unknown

Employee Type: Unknown

Payroll Type: Unknown

Premium Coupon Type: Coupon Book

Event Category: If Employee is losing coverage select Employee. If dependents ONLY are losing coverage select Dependent.

Event Type: Select Applicable Event

Event Date: Date of Event

Date of Hire/Enrollment Date: Can be ANY date prior to Event Date. Does not print on anything so it does not need to be accurate.

Has this Member been offered COBRA: Typically NO unless you had a previous administrator already offer this person COBRA.

Add Qualified Beneficiary

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

Add Plan

Plan
 Bundle

Plan *
Choose...

Coverage Level *
Choose...

Cancel

5) Add Plans

Add Plan

Plan
 Bundle

Plan *
Anthem Care-All Medical

Coverage Level *
OB-Only

Plan rate for the selected coverage level is: \$56.00

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 * 04/16/2019

Last Day of Coverage 10/15/2019

Cancel

Add Qualified Beneficiary

Dependents Step 4 of 7

+ Add Dependent Refresh

Name	Date of Birth	Relationship	SSN	Gender
No data to display				

Showing 0 to 0 of 0 entries

Cancel Previous Save & Continue

6) Add all dependents that are losing coverage due to the event

Add Dependent

Relationship:

Qualifying Medical Child Support Order (QMCSO):

Qualification:

First Name:

Middle Initial:

Last Name:

DOB:

Date of Birth:

Gender:

Birthdate Date:

Plan Start Date:

If Address same as Qualified Beneficiary:

Address:

Address 2:

City:

First Last:

State:

Zip:

Country:

Phone:

Phone 2:

Email:

Cancel Add

Make sure to check off the plans that the dependent is losing.

AVAILABLE DEPENDENT BUNDLE(S)

Bundle Name	Start Date	End Date
<input checked="" type="checkbox"/> Bundle 1000	02/01/2018	07/31/2019

+ Add Selected Dependent Bundle(s)

Add Subsidy Schedule

Subsidy Schedule Start:

Subsidy Schedule End:

Subsidy Schedule Type:

Subsidy Schedule Amount Type:

Plan Type:

Amount:

Cancel Add

7) Add Subsidy if the employer will be covering a portion of the premium for a period of time.

Add Qualified Beneficiary

Subsidies Step 5 of 7

Subsidy Schedule has been successfully added

+ Add Subsidy Schedule

Start Date	End Date	Plan Type	Subsidy Type	Subsidy Amount Type	Amount	Edit	Delete
04/18/2018	04/18/2018	Medical	Employer Subsidy	Percentage	10.00%		

Showing 1 to 1 of 1 entries

Cancel Previous Save & Continue

8) Letter Inserts: We currently do not have any letter inserts for any clients. You can Save and then the notice will be in the queue for mailing the following business day.