

BenefitHelp Solutions COBRA EMPLOYER PORTAL QUICKSTART GUIDE



Welcome to BenefitHelp Solution's COBRA 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.

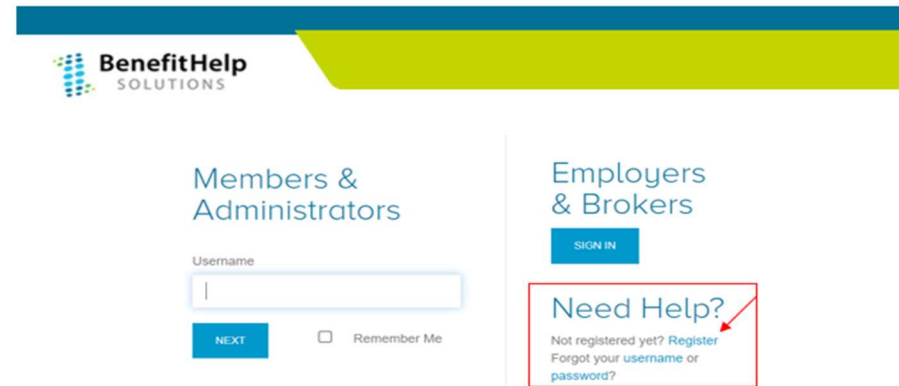
The COBRA Employer Portal is convenient and easy to use. Any-time access to the portal allows you to:

- 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 <https://cobra.benefithelpsolutions.com/> and select **Register**.
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 select **Sign In** under the **Employers and Brokers** section.

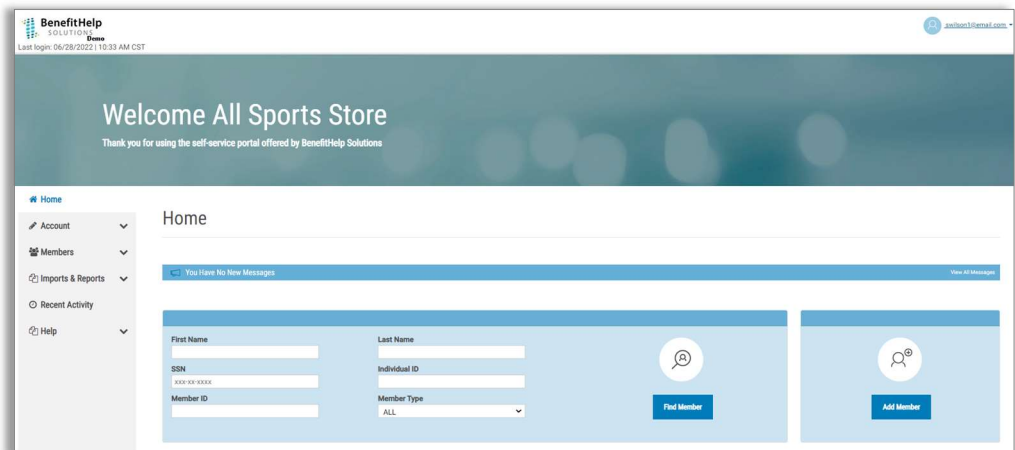


The **Home** page is easy to navigate:

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 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 BenefitHelp Solutions for printing and mailing.

BenefitHelp SOLUTIONS
Last login: 06/28/2022 11:33 AM CST

Home Account Members Add Member Find Member Imports & Reports Recent Activity Help

Add Member

Choose Member Type to Add

Qualified Beneficiary

An individual who has lost group health plan coverage due to a qualifying event such as termination or retirement. The individual must be a covered employee, spouse of a covered employee, or the dependent child of a covered employee.

Next

New Hire

An individual who is a current employee and not yet receiving COBRA benefits.

Next

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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

Account Members Add Member Find Member Individual Member Profile Plans & Bundles Dependents Subsidies Payments Premiums Due Letter Inserts Letter Attachments Communications Timeline Imports & Reports Recent Activity Help

Kasimir Mayo
Qualified Beneficiary Member | SSN: 999-99-9999
Employer: All Sports Store
Employer Division: All Sports Store

Event Date: 01/28/2022
Member has not added any plans
Last Day to Elect:
First Day of Coverage:

Profile

Member Information

Name: Kasimir Mayo	Date of Birth:	SSN: 999-99-9999	Gender: F
Address: 1111 SW 11th St, Somers, WA 99999	Phone:	Phone 2:	Email: megen.hedrick@benefithelp.com
Communication Preference: USPS	Employment Type: Full-Time Employee	Payroll Type: Hourly	Tobacco User: Unknown
Individual Identifier:	Plan Category:	Member Identifier: 121142	Years of Service:

Event Information

Event Category: Employee	Specific Rights Processed Date:
Event Type: Termination	2nd Event: No
Event Date: 01/28/2022	Legacy: No
Date Entered: 03/01/2022	Last Day of Initial Grace Period:

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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.

The screenshot shows the 'Standard Reports' page. On the left is a navigation menu with options: Account, Members, Imports & Reports (selected), Recent Activity, and Help. Under 'Imports & Reports', there are sub-options: Imports, Accounting Reports, and Standard Reports (selected). The main content area is titled 'Standard Reports' and includes a 'Choose Report Type' dropdown set to 'Carrier Notifications Pending'. Below this is a 'Report Settings' section with a dropdown for 'Employer Name' (set to 'All Sports Store') and a 'Mask SSN on report' checkbox. The 'REPORT FORMAT' section has radio buttons for 'Adobe Reader Format' (selected), 'Comma Separated Values Text File', 'Microsoft Access Database File', and 'XML File'. At the bottom, there is a 'Run Report' button and a field for 'Email Addresses to notify when report is complete'.

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**.

The screenshot shows the 'Imports' page. The left navigation menu is the same as the previous screenshot, with 'Imports' selected under 'Imports & Reports'. The main content area is titled 'Imports' and includes a 'Select File & Import Options' section with a file upload button and a 'Select' button. Below this is an 'Import Options' section with checkboxes for: 'Suppress New Member Login Letters', 'Suppress Termination Letters', 'Suppress Take Over Letters for Terminated Members', 'Suppress All Letters', 'Enable Qualified Beneficiary Plan Consolidation', and 'Mask SSN on report'. To the right of these options is a 'Import Specifications' panel with links for 'Version 1.x', 'Version 2.x', and 'Version 3.x'. At the bottom, there is an 'Import File' button and a field for 'Email Addresses to notify when import is complete'.

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HOW DO I VIEW COMMUNICATIONS AND MESSAGES?

1. Select the **Account** option to expand it and show the **Communications** option.
2. 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 members.
3. Information available includes:
 - Carrier Information
 - Rates
 - Plan Settings

