



# EMPLOYEE BENEFIT SERVICES PROCESSING COBRA

Locate COBRA on the home page:

1. Under click on the number next to COBRA under Company Stats

The screenshot shows the SET SEG home page dashboard. At the top left, there is a search bar for "Employee last name, first name, or full SSN". Below it is a "Welcome back" message with a user profile icon and a "Things to do" section with a "Completed" tab. The "Things to do" list includes: "No partner discrepancies", "No pending benefit enrollments", "No pending profile changes", "No employees missing HR required fields", "No invalid addresses", "No pending EOI", and "Integration actions completed", each with a green checkmark. Below this is a "Quick Links" section with links for "Company Timeline", "Add Employee", "Ad-hoc Reports", "Manage Saved Report Templates", "Org Chart", and "Add Document". On the right side, there is a "List" and "Calendar" view selector, a "Coming Up" section with a "Filter" button, and a "Company Stats" section with a "Customize" button. The "Company Stats" section displays: "Active Employees: 133", "Next Payroll Date: 03/31/2023", and "COBRA: 0".

2. You will then be able to view candidates who are eligible to enroll, enrolled participants, or any participants who have ended their COBRA coverage

The screenshot shows the "COBRA Dashboard" interface. On the left, there is a "Manage" dropdown menu with options for "Dashboard", "Candidates", "Enrolled", and "Ended". The "Candidates" option is highlighted. In the center, there is a horizontal bar chart titled "Top 5 qualifying events for the past 12 months" showing the number of participants for each event: "Voluntary Termination" (14), "Retirement" (4), "Automated Loss of Dependent..." (1), and "Divorce or Legal Separation" (1). On the right, there is a "Read support article" button and an "Overall Usage" section with the following data: "COBRA Participants: 0", "In COBRA election period: 2", and "Election period expired: 18".

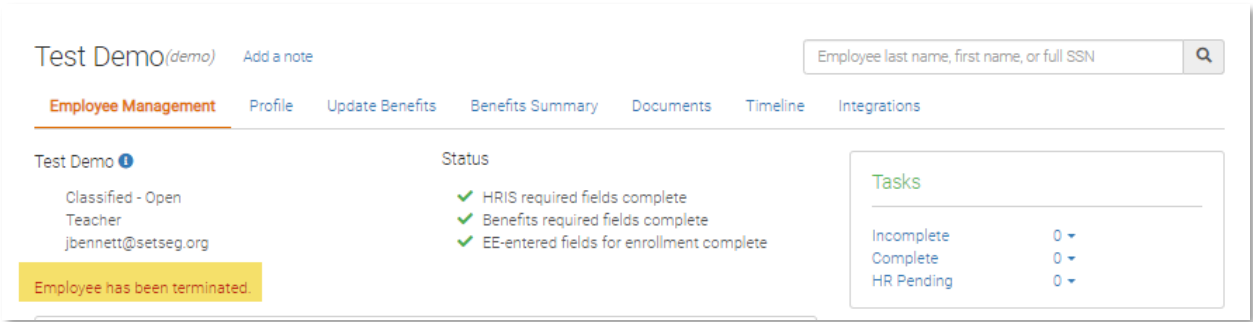


# PROCESSING COBRA

## Adding a COBRA Participant:

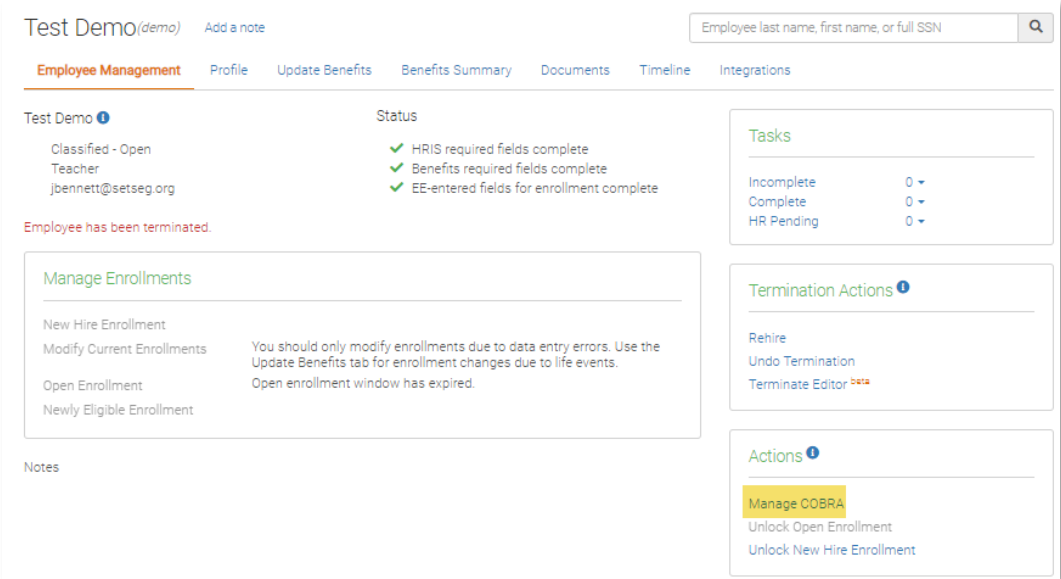
- 1. Make sure the employee is terminated correctly
  - a. Select the Employee Management tab
  - b. Check that the employee is showing as **terminated\***

**Note:** The termination reason you choose will trigger Employee Navigator to calculate the correct eligible dates (i.e. 18, 24, 29 months) – if you have any further questions on how to process a termination, please review the **Processing a Termination** quick guide



\*This will ensure that the employee has been moved to a COBRA candidate.

- 2. Under Actions select **Manage COBRA**





# EMPLOYEE BENEFIT SERVICES PROCESSING COBRA

3. Select **Elect** on the applicable COBRA Qualifying Enrollment Event

The screenshot shows the 'Employee COBRA Overview / Test Demo' page. It features a 'COBRA Enrollments' section with 'No enrollments'. Below it is a 'COBRA Qualifying Enrollment Events' table with one row: 'Demo, Test' with reason 'Voluntary Termination', event date '03/31/2023', and days since '-2'. A yellow 'Elect' button is next to this row. To the right, there is a 'Manual Enrollment beta' section with a note and an 'Add enrollment +' button.

- 4. This will take you to the COBRA Enrollment Editor
- 5. Select the **Actions Menu** (three stacked dots) for the products you wish to enroll in

The screenshot shows the 'Test Demo / COBRA Enrollment Editor' page. It displays three product categories, each with a table of enrolees. A vertical yellow bar highlights the 'Actions Menu' (three stacked dots) for each enrolee row.

Product	Reason	Eligible	Coverage Level	Prior Eligibility	Enrollee	Paid Through	Coverage Ended
2022 BCBSM PPO HSA Medical Classified Employees - Option 2	Voluntary Termination	04/01/2023 to 09/30/2024	n/a	07/01/2022	Test Demo		
					Joe Test (Spouse)		
					Child Test (Child)		
					Littlest Test (Child)		
2022 ADN Dental 50% Classified Employees LF	Voluntary Termination	04/01/2023 to 09/30/2024	n/a	07/01/2022	Test Demo		
					Joe Test (Spouse)		
					Child Test (Child)		
					Littlest Test (Child)		
2022 EyeMed Vision Classified Employees	Voluntary Termination	04/01/2023 to 09/30/2024	n/a	07/01/2022	Test Demo		
					Joe Test (Spouse)		
					Child Test (Child)		
					Littlest Test (Child)		



# EMPLOYEE BENEFIT SERVICES PROCESSING COBRA

6. Select **Elect** and enter a Paid Through Date

**Note:** You will want to enter the paid through date as the **last day the participant is eligible** for COBRA (i.e., 9/30/2024 in this example) – using the last day they are eligible will avoid the participant getting terminated prematurely if the paid through date does not get updated each month

Test Demo / COBRA Enrollment Editor [Back to list](#)

2022 BCBSM PPO HSA Medical Classified Employees - Option 2		Enrollee	Paid Through	Coverage Ended
<a href="#">Modify</a>		Test Demo	09/30/2024	⋮
Reason	Voluntary Termination	Joe Test (Spouse)		⋮
Eligible	04/01/2023 to 09/30/2024	Child Test (Child)		⋮
Coverage Level	Employee	Littlest Test (Child)		⋮
Prior Eligibility				

2022 ADN Dental 50% Classified Employees LF		Enrollee	Paid Through	Coverage Ended
Reason	Voluntary Termination	Test Demo		⋮
Eligible	04/01/2023 to 09/30/2024	Joe Test (Spouse)		⋮
Coverage Level	n/a	Child Test (Child)		⋮
Prior Eligibility	07/01/2022	Littlest Test (Child)		⋮

2022 EyeMed Vision Classified Employees		Enrollee	Paid Through	Coverage Ended
Reason	Voluntary Termination	Test Demo		⋮
Eligible	04/01/2023 to 09/30/2024	Joe Test (Spouse)		⋮
Coverage Level	n/a	Child Test (Child)		⋮
Prior Eligibility	07/01/2022	Littlest Test (Child)		⋮

**Note:**

- You will need to elect and enter a paid through date for each family member you would like to enroll in coverage
- If you wish to enroll just a spouse or dependent, please follow the same steps listed above



# EMPLOYEE BENEFIT SERVICES PROCESSING COBRA

## Adding a Dependent to an Existing Enrollment:

If you need to add a dependent due to a qualifying event:

- 1. Navigate to the Employee Home Page
- 2. Select **Profile** and then **Add Dependent** – enter applicable information

The screenshot shows the 'Cocoa Puffs' employee profile page. The 'Profile' tab is selected. On the left, there is a navigation menu with options like Profile, Employment, Leave Status, Addresses, Contact, Compensation, ACA, Scheduled Changes, and Personal. Below this is a 'Supplemental Info' section with a highlighted 'Dependents' link. The main content area is titled 'Dependents' and features a green 'Add dependent +' button. Below the button is a table with columns for Edit, Name, SSN, DOB, Relationship, Age, Sex, and Sequence number. The table lists three dependents: Chocolate Puffs (Spouse, DOB 01/20/1977, Age 46, M, Sequence 3), Sony Puff (Child, DOB 08/03/1998, Age 24, F, Sequence 1), and Cuckoo Puffs (Child, DOB 09/08/2021, Age 1, M, Sequence 2). A 'view SSN's' checkbox is located to the right of the table.

Edit	Name	SSN	DOB	Relationship	Age	Sex	Sequence number
	Chocolate Puffs	***-**-3333	01/20/1977	Spouse	46	M	3
	Sony Puff	***-**-1111	08/03/1998	Child	24	F	1
	Cuckoo Puffs	***-**-1010	09/08/2021	Child	1	M	2

- 3. Return to the Employee Home Page



# EMPLOYEE BENEFIT SERVICES

## PROCESSING COBRA

### 4. Select Manage COBRA

Cocoa Puffs [Add a note](#)

**Employee Management** Profile Update Benefits Benefits Summary Documents Timeline Integrations

Cocoa Puffs **Status**

- ✓ HRIS required fields complete
- ✗ Benefits required fields complete
- ✓ EE-entered fields for enrollment complete

Employee has been terminated.

**Manage Enrollments**

- New Hire Enrollment
- Modify Current Enrollments You should only modify enrollments due to data entry errors. Use the Update Benefits tab for enrollment changes due to life events.
- Open Enrollment Open enrollment window has expired.
- Newly Eligible Enrollment

Notes

**Tasks**

- Incomplete 0
- Complete 0
- HR Pending 0

**Termination Actions**

- Rehire
- Undo Termination
- Terminate Editor beta

**Actions**

- Manage COBRA
- Unlock Open Enrollment
- Unlock New Hire Enrollment

### 5. Select the Edit icon on the applicable COBRA Qualifying Enrollment Event

### Employee COBRA Overview / Cocoa Puffs

**COBRA Enrollments**

Participant	Reason	Paid Through	Benefits	Edit
Puffs, Cocoa	Voluntary Termination	06/30/2023	Dental	

### 6. This will take you to the COBRA Enrollment Editor



# EMPLOYEE BENEFIT SERVICES PROCESSING COBRA

7. Select the **Actions Menu** (three stacked dots) next to the dependent

Cocoa Puffs / COBRA Enrollment Editor ← Back to list

2021 ADN Dental <span>Modify</span>		Enrollee	Paid Through	Coverage Ended
<b>Reason Eligible</b>	Voluntary Termination	Cocoa Puffs	06/30/2023	⋮
<b>Coverage Level</b>	01/01/2022 to 06/30/2023	Chocolate Puffs (Spouse) <small>(not originally enrolled)</small>		⋮
<b>Prior Eligibility</b>	Employee	Sony Puff (Child)		⋮
		Cuckoo Puffs (Child)		⋮

**Elect Dependent**

8. Select **Elect** and enter a paid through date, then click **Save**

Edit Enrollment ×

Enrollee	Cuckoo Puffs (Child)
Plan	2021 ADN Dental
Paid Through	<input type="text" value="06/30/2023"/>

**Save**



### Terminating a COBRA Participant

- 1. Select the **Actions Menu** (three stacked dots)
- 2. Select **End** and enter the last day of coverage

Test Demo / COBRA Enrollment Editor

2022 BCBSM PPO HSA Medical Classified Employees - Option 2		Enrollee	Paid Through	Coverage Ended	
<a href="#">Modify</a>		Test Demo	09/30/2024	04/30/2023	⋮
<b>Reason</b>	Voluntary Termination	Joe Test (Spouse)			⋮
<b>Eligible</b>	04/01/2023 to 09/30/2024	Child Test (Child)			⋮
<b>Coverage Level</b>	Employee	Littlest Test (Child)			⋮
<b>Prior Eligibility</b>					