



User Manual

Client Portal

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Recommended PC Settings

To access and use the Portal you will need:

- Internet Explorer 7.0 with SP2 installed
- Cookies enabled on Internet Explorer 7.0
- JavaScript enabled on Internet Explorer 7.0
- Display resolution of at least 1024 x 768 pixels
- Mouse (or pointing device)
- Keyboard

To fully view reports and letters you will need:

- Adobe Acrobat Reader 7.0 (or higher)
- Microsoft Excel 2000 (or higher)

To print reports and letters you will need

- Printer capable of printing on 8.5 x 11 inch paper

COBRApoint COBRA Software requires Internet Explorer 7.0 (IE) or above. To find out what version of IE you have follow the instructions below:

- In Internet Explorer, click on the Help menu
- Select About Internet Explorer
- Read the version number located on the first line. If the version number says 7.0, then you have IE7.

COBRApoint Software requires that you enable cookies for session management. To enable cookies in IE7 follow the instructions below:

- Open your Internet Explorer browser
- Click Tools located at the top of the browser and select Internet Options
- Click Privacy located at the top of the window
- Click Advanced
- Check the check box Override automatic cookie handling
- Check the box to Enable Always allow session cookies

COBRApoint requires that you have JavaScript enabled in your web browser. To enable JavaScript in IE7 follow the instructions below:

- In Internet Explorer, click on the Tools menu
- Select Internet Options...
- Select the Security Tab
- Click on Custom Level...
- Scroll to Java permissions, click to select High Safety
- Select to Enable Active scripting
- Click OK
- Click OK

- In Internet Explorer, click on the File menu
- Close browser
- Re-launch browser

COBRApoint will automatically open PDF reports within the same internet browser. For maximum image viewing each user can change Adobe's set-up information to open the selected report in a separate window. To do so follow these steps:

- Open Adobe
- Select Preferences
- Select Internet in the left selection menu
- Uncheck the checkbox "display PDF in browser"

Login Generation

The first time a TPA selects the option to generate a login for a client a **New Client Login Letter** will be sent to the client. This letter contains the user registration code needed to configure the client contact's account. Subsequent logins for the client will not receive a **New Client Login Letter**.

Login Process

First Time User Registration

First time users must be required to register. The registration process contains multiple steps.

- Verification of identity. New user must enter their unique registration number from their letter.
- COBRApoint will then display the following message "If you are not the below named person 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." Along with the Client Name associated with this unique registration number and the user's email address. A client portal user is also prompted to enter their companies EIN number.
- The user will then be presented with a click-through license agreement. The user must actively check a box confirming "I accept these Terms and Conditions" and then they can click to complete their registration.
- The final step of the registration process is to display the user's user name (their email address as entered in their client contact screen by a TPA user) and ask them to enter a new password twice.

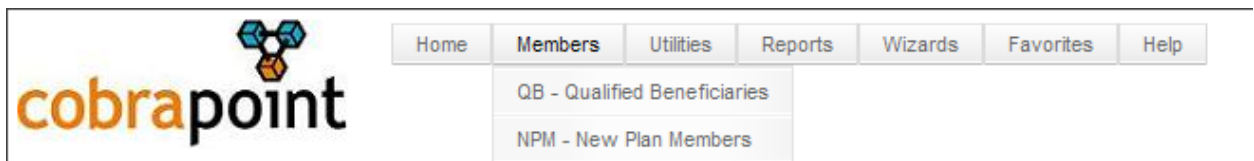
Forgot Password

The "forgot password" functionality will be displayed on the login screen of the client portal. The user will be prompted to reenter their original registration number and EIN. If the user does not have their unique registration number, please contact your COBRA administrator for this information. Once the user properly enters their registration number and EIN, you will be reminded of the user name and prompted to enter a new password.

About the Interface

COBRApoin't's client portal interface is designed for ease of use and structured logically to allow users easy navigation.

Across the top are Tabs with drop-down capabilities for additional information.



The left-hand side of COBRApoin't displays a searchable list of the member selected at the top.

The screenshot shows the member search and display interface. On the left side, there are search criteria for 'QB' (Qualified Beneficiaries): radio buttons for 'QB' (selected) and 'NPM', input fields for 'Last Name:', 'First Name:', 'SSN:', and 'Individual ID:', a checkbox for 'Include Inactive', and a 'Search' button. Below these is a table with columns 'Name', 'SSN', and 'Ind. ID'. The table contains three rows of data: 'MAN, TESTING AGAIN' (SSN: 339-39-3939), 'TESTING, CONTINUALLY' (SSN: 145-96-8798), and 'TESTINGTHINGS, STILL' (SSN: 123-45-6894). Above the table are links for 'Add a new QB' and 'Refresh'. On the right side, there are search criteria for 'NPM' (New Plan Members): radio buttons for 'QB' and 'NPM' (selected), input fields for 'Last Name:', 'First Name:', 'SSN:', and 'Individual ID:', a checkbox for 'Include Inactive', and a 'Search' button. Below these is a table with columns 'Name', 'SSN', and 'Ind. ID'. The table contains one row of data: 'NPM, TEST' (SSN: 233-13-1313). Above the table are links for 'Add a new NPM' and 'Refresh'.

The right-hand side of the application is the work area in which information is displayed and may be edited. Here the user can again find tabs under which information is logically sorted.

QB Information:

Name:	STILL TESTINGTHINGS
Address:	1515 MAIN SE ROAD OMAHA, NE 68106
SSN:	123-45-6894
DOB:	5/21/1976
Individual ID:	
Phone:	
Email:	

QB Event Information:

Event Category:	Employee
Event Type:	Termination
Qualifying Event Date:	6/15/2008
Original Enrollment Date:	1/1/2008
Specific Rights Processed Date:	5/30/2008
2nd Event:	No
Legacy:	No
Latest Election PMD:	8/30/2008
1st Payment Latest PMD:	

QB Additional Information:

Disability Extension Approved:	No
Uses Health Coverage Tax Credit:	No
Conversion Letter Processed:	No
At Least 1 Dependent on QMCSO:	No
Last Subsidy Month:	
Registration Code:	xdLDHX09
Registration Date/Time:	
User Name:	

Client / Client Division:

Client:	ABC Test Company	Client Division:	ABC Test Company
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Last Payment:

Postmark Date	Entered Date	Amount	Payment Method	Check #

Next Payment:

Premium Month	Amount Due	Latest PMD

Plan Information as of: 6/2/2008

Insurance Type	Plan	First Day of COBRA	Last Day of COBRA	Coverage Level	Status	Bundle Name

GENERAL INFORMATION

Home

The Home Tab will always contain the client data that is being accessed.

Home Members Utilities Reports Wizards Favorites Logoff

Quick Search

General Contacts Plans Bundles Divisions Communications

Client Group: **CustomLetterTextValidation**
Client Name: **Letter Test Inc.**
DBA Name: **Letters for All**
EIN: **98-9898989**

Primary Address: Address: <input type="text" value="12369 Maple St"/> Address2: <input type="text"/> City: <input type="text" value="Omaha"/> State: <input type="text" value="NE"/> Zip: <input type="text" value="68106-_____"/>	Phone Numbers: Phone: <input type="text" value="(402) 444-4989"/> Fax: <input type="text" value="(402) 444-5555"/>	Billing Start: Billing Start Date: <input type="text" value="01/01/2007"/>
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------

Client Options:

<input checked="" type="checkbox"/> Send HIPAA Cert with Specific Rights and Termination letters	Client Premium Notice Type: Coupon Book
<input checked="" type="checkbox"/> Allow Client Portal Access	Employee Count Range: 20 or More Employees
<input checked="" type="checkbox"/> Allow SPM Plans	
<input type="checkbox"/> Automatically Create a Subsidy for any QB Payment short by Insignificant Amount	

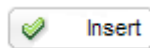
Edit a Client

Certain data on the client General tab can be edited

- Access the "General" Tab of the client record
- Make desired changes
- Click the "Save" button

Add a Contact

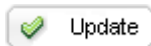
- Access the record to which a contact will be added
- Click on the “Contacts” Tab
- Click the “Add a new Contact” link
- Enter all necessary information
- Click the “Save” button



Edit a Contact

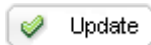
Contacts may be edited at any time.

- Access the contact to be edited
- Click on the “Edit” link next to the contact
- Make desired changes
- Click the “Save” button



Deactivate a Contact

- Access the contact to be deactivated
- Uncheck the “Active” checkbox located in the left hand corner
- Click the “Update” button



Activate a Contact

- Access the contact to be activated
- Check the “Active” checkbox in the left hand corner
- Click the “Update” button

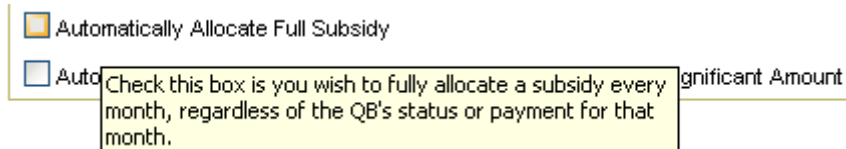


NOTE: *Only data on the General Tab and the Contacts Tab can be added or edited.*

NOTE: *If the desired information to be edited cannot, please contact your administrator.*

Tool Tips

By hovering over any field in COBRApoint, a tool tip will appear explaining the usage of this field.



Refresh Option

At any point the user can click the refresh link to update information displayed on the page.

Typically this should not be necessary, but should be tried before seeking further trouble shooting opportunities.



Search Function

The Global Quick Search box is located in the upper right hand corner of the main COBRApoint application. At any time a user may enter a partial word, one word, or multiple word search string and a “Google-like” return will result.



The Search tab on the main COBRApoint menu interface will take the user to an advanced search entry screen where more complex searches may be performed than through the Global Quick Search.

The following fields can be search for:

- QB Name
- Dependent Name
- NPM Name
- Email
- Social Security Number
- Date of Birth

Required Information

COBRApoinT requires certain data fields for accurate processing of QBs and NPMs. The system will not allow saving of an action without all of the required information. These fields are highlighted in red for ease of use.

Primary Address:			
Address:	<input type="text"/>		
Address2:	<input type="text"/>		
City:	<input type="text"/>	St: <input type="text"/>	Zip: <input type="text"/>
Country:	<input type="text"/>		

Wizards

COBRApoinT provides a number of wizards to assist users and ease the entry of commonly manually entered information. These wizards may be quickly accessed through the tab in the application, or within the appropriate section of COBRApoinT. (i.e. clicking on the “Add a new QB” link within the Members tab will open the appropriate wizard)

Reports	Wizards	Favorites	Help
	Add a new QB Wizard		
	Add a new NPM Wizard		

1. General 2. Event 3. Plans 4. Dependents 5. Subsidies 6. Letter Inserts

Client Name: ABC Test Company Division: ABC Test Company

Salutation: Choose... First Name: MI: Last Name:

Identification Information:
 SSN: Individual Identifier:

Contact Information:
 Email: Phone: Phone 2:

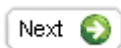
Primary Address:
 Address: Address2: City: St: Zip: Country:

Demographics:
 Gender: Male Female DOB: Tobacco Use: Unknown

Employee Information:
 Employee Type: Unknown Payroll Type: Unknown Years of Service:

Previous Next Finish Cancel

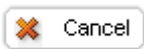
Wizards will lead the user through a number of screens necessary to enter a record into COBRApoint. Users navigate through the wizard by using the “Next” and “Previous” buttons at the bottom of the screen.



When all necessary information is entered, users may save the record by clicking “Finish”. COBRApoint will not allow saving of the record without all necessary information completed.



The “Cancel” button allows users to exit the wizard without saving any previously entered information.



The following Wizards are available:

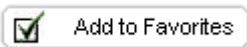
- Add a new QB
- Add a new NPM

Favorites

COBRAPoint allows users to pick their “favorite” records, which could be records that are accessed on a regular basis.

Favorites are based on a login, not at the database level. To add records to the Favorites list, complete the following steps:

- Access the record (QB or NPM)
- Click on “Add to Favorites” Button



To access the Favorite List click on the “Favorites” Tab at the top of the screen.




This screen will display the following information:

- Favorite QBs
 - Member Name
 - SSN
 - Ind. ID
 - Qualifying Event Date
 - Client
- Favorite NPMs
 - Member Name
 - SSN
 - Ind. ID
 - Client
- Most Recently Used QBs
 - Last Accessed
 - Member Name
 - SSN
 - Ind. ID
 - Qualifying Event Date
 - Client Name
- Most Recently Used NPMs
 - Last Accessed

- Member Name
- SSN
- Ind. Id

NOTE: *The amount of Most Recently Used (MRU) records can be determined by changing the number on the bottom of the screen. (5, 10, 15, 20, 25, 50, 100)*

of Items in MRU Lists: 

NOTE: *Most Recently Used records as well as favorites are determined per user log-in and are individual to each user.*

To remove a record from the favorite list, click on the “Remove” link next to the record.

Favorite QBs				
Member	SSN	Ind. ID	Qualifying Event Date	Client
MAN, TESTING AGAIN	339-39-3939		06/15/2008	ABC Test Company Remove

WORKING WITH RECORDS

Entering Records

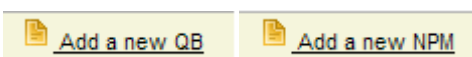
There are multiple ways that records may be entered into COBRApoint:

- Client enters data through the COBRApoint Client Portal
- Client uploads files into COBRApoint through the Client Portal

The following types of records may be uploaded using a file:

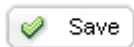
- QBs
- Legacy or Takeover QBs
- NPMs

Manual entry of records can occur through *wizards* which can be found under the *Wizards Tab*, or by clicking on the “Add a new...” link within the section of the record to be entered, for example: “Add a new QB” or “Add a new NPM” when in the Member section.



Updating Records

To update a record, access the appropriate QB or NPM record, make desired changes and click the Save button.

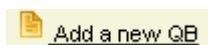
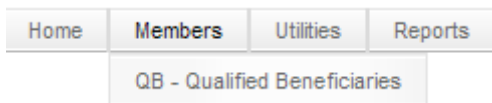
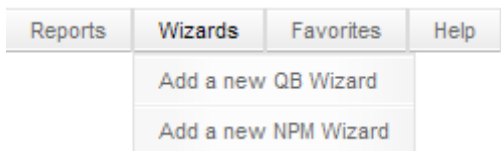


NOTE: *Changes to a member record cannot be done once the Specific Rights or Initial Notice has been printed.*

QUALIFIED BENEFICIARIES (QBs)

Entering a QB

Within the Client Portal, click on the “Add a new QB” link to launch the Wizard or access the “Add a new QB Wizard” through the Wizards Tab or through the Members Tab.



- Follow the wizard
- Click the “Finish” button



NOTE: *There can be multiple entries of the same QB with the same SSN. COBRApointhas the following uniqueness constraints on QBs.*

- *There cannot be multiple entries of the same SSN in combination with the same Qualifying Event Date (QE Date) under the same Client.*

California QBs

If a QB is entered with a California address, the QB will automatically receive the California Conversion Letter as well as a California Termination Letter.

NOTE: *In order for this to work correctly, the QBs state **has to be entered as CA.***

Legacy QBs - Takeovers

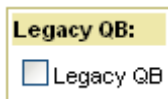
A Legacy QB is often also referred to as a “takeover” and is a member that is pending or enrolled under COBRA and has been previously managed by another COBRA administrator or the employer themselves.

NOTE: *When entering a legacy QB who is already paid till the end of COBRA there might be potential conflicts if this QB is undergoing changes in the future (i.e. coverage level change, rate change). Since COBRApont never created payment records for this QB, the system would not recognize the change and would not re-allocate monies. Users should follow these steps in order to ensure accuracy:*

- *Enter QB with a paid-through date up until the current month*
- *Contact your administrator to enter the remaining amount as non-cash payment*

NOTE: *COBRApont allows the maximum time of the next payment due as the following of the current month. If the QB has paid further in the future, please contact your administrator for assistance.*

A Legacy QB should be entered through the “Add a new QB” Wizard. On the **Event Tab (2.)** of the Wizard click the Legacy QB check-box.



The image shows a small rectangular box with a yellow header containing the text "Legacy QB:". Below the header is a white area containing a small square checkbox followed by the text "Legacy QB".

When checking the Legacy QB check box, additional fields will require input in order to place the QB at the correct time of the COBRA life cycle.

1. General 2. Event 3. Plans 4. Dependents 5. Subsidies 6. Letter Inserts

Qualifying Event Information:
 Category: Employee Dependent
 Event Type: Choose...
 Event Date:

HIPAA Information:
 Original Enrollment Date:

Legacy QB:
 Legacy QB
 Date Specific Rights Notice was Printed:
 Postmark Date of Election Form:

Next Premium Owed
 Month: 01 - January Year: 2008

Disability Extension
 Disability Approved
 Send Takeover Letter
 Conversion Letter Has Been Sent

Previous Next Finish Cancel

Upon entry of a legacy QB, COBRApoint will generate a Takeover letter, informing the QB about the new administrator.

COBRApoint will automatically send a Conversion Notice to any QB reaching the 180-day mark. If that QB has an address in the state of CA the notice will automatically include special language for CA residents. If the legacy QB is already past this time frame, COBRApoint will generate a Conversion Notice upon entry.

If there is a balance on the QBs account please contact your administrator for assistance

Tips for the “Add a New QB Wizard”

The screenshot displays the 'Add a New QB Wizard' interface with the following sections and fields:

- Navigation Tabs:** 1. General (selected), 2. Event, 3. Plans, 4. Dependents, 5. Subsidies, 6. Letter Inserts
- Client Information:** Client Name: Letter Test Inc., Division: Letter Test Inc. (dropdown)
- Personal Information:** Salutation: Choose... (dropdown), First Name: [text], MI: [checkbox], Last Name: [text]
- Identification Information:** SSN: [text], Individual Identifier: [text]
- Contact Information:** Email: [text], Phone: () - - - , Phone 2: () - - -
- Primary Address:** Address: [text], Address2: [text], City: [text], St: [text], Zip: [text], Country: [text]
- Demographics:** Gender: Male Female, DOB: [text], Tobacco Use: Unknown (dropdown)
- Employee Information:** Employee Type: Unknown (dropdown), Payroll Type: Unknown (dropdown), Years of Service: [text]
- Navigation Buttons:** Previous, Next, Finish, Cancel

TIP: COBRApoint will allow multiple records with the same SSN. Therefore search for the to-be entered QB to ensure no double entry.

Qualifying Event Information: Category: <input checked="" type="radio"/> Employee <input type="radio"/> Dependent Event Type: Choose... Event Date: <input type="text"/>	HIPAA Information: Original Enrollment Date: <input type="text"/>
Legacy OB: <input type="checkbox"/> Legacy OB	

TIP: The Event Type drop down populates with the appropriate reason, depending on the selected Category i.e. Employee or Dependent. If Employee is chosen the event types such as Termination or Retirement appear. When selecting Dependent, event types such as Divorce or Ineligible Dependent show in the drop down.

1. General 2. Event 3. Plans 4. Dependents 5. Subsidies 6. Letter Inserts

Add a Plan [Refresh](#)

Insurance Type	First Day of COBRA	Last Day of COBRA	Months COBRA	Days Elect	Days 1stPmt	Days SubPmts	Status	Status Date	Election Postmark	Term Date
No records to display.										

Previous Next Finish Cancel

TIP: A QB can be saved without assigning a plan but no COBRA Specific Rights (SR) Notice will added in the letter queue. Once the user adds plans to the QB the SR Notice will generate.

1. General 2. Event 3. Plans 4. Dependents 5. Subsidies 6. Letter Inserts

General

Plan Bundle

Plan:

Coverage Level:

Insurance Type Information:		First / Last Days of COBRA:	
# Months of Coverage:	<input type="text" value="18"/>	FDOC (First Day of COBRA):	<input type="text" value="06/01/2008"/>
# Days to Elect:	<input type="text" value="60"/>	LDOC (Last Day of COBRA):	<input type="text" value="11/30/2009"/>
# Days to Make 1st Payment:	<input type="text" value="45"/>		
# Days to Make Subsequent Payments:	<input type="text" value="30"/>		

TIP: If the QB should have more than one plan, select the first plan, click insert. You may insert as many plans as applicable.

TIP: Only one plan per insurance type may be added. i.e. a QB cannot have 2 Dental Plans.

TIP: When entering a Legacy QB, COBRApont will ask for an additional Plan Start Date as well as a Send Plan Change Letter check-box. This date can either be the next month a premium payment is due or the COBRA start date of the QB.

Start Date:

Plan Bundle

Plan:

Coverage Level:

Insurance Type Information:

# Months of Coverage:	<input type="text" value="18"/>
# Days to Elect:	<input type="text" value="60"/>
# Days to Make 1st Payment:	<input type="text" value="45"/>
# Days to Make Subsequent Payments:	<input type="text" value="30"/>

First / Last Days of COBRA:



FDOC (First Day of COBRA):

LDOC (Last Day of COBRA):





Legacy QB Plan Change Letter:

Send Plan Change Letter

1. General 2. Event 3. Plans 4. Dependents 5. Subsidies 6. Letter Inserts

 Add a Dependent  Refresh

Name	Relation	Date of Birth	SSN	Sex
No records to display.				

 Previous  Next  Finish  Cancel

1. General 2. Event 3. Plans 4. Dependents 5. Subsidies 6. Letter Inserts

General Plans

Relationship: Choose...
Salutation: Choose... First Name: MI: Last Name:

Identification Information:
SSN: - - -

Contact Information:
Email:
Phone: () - - Phone 2: () - -

Address: Same As QB

Demographics:
Gender: Male Female
DOB:

HIPAA Information:
Enrollment Date:

1. General 2. Event 3. Plans 4. Dependents 5. Subsidies 6. Letter Inserts 7. Notes

General Plans

Relationship: Choose...
 Salutation: Choose... First Name: MI: Last Name:

Identification Information:
 SSN: - - -

Contact Information:
 Email:
 Phone: () - - Phone 2: () - -

Address: Same As QB

Demographics:
 Gender: Male Female
 DOB:


HIPAA Information:
 Enrollment Date:

TIP: If a Dependent is entered for which an age/sex rated plan should be entered the date of birth and gender is required. Otherwise the age/sex rated plan will not be displayed as a selection option.

TIP: Before clicking Insert be sure to fill out the Plans Tab as well

TIP: Only plans will be available that have a coverage level higher than “QB Only”.

1. General 2. Event 3. Plans 4. Dependents 5. Subsidies 6. Letter Inserts

 [Add a Subsidy Schedule](#) [Refresh](#)

Start Date	End Date	Insurance Type	Subsidy Amount Type	Amount
No records to display.				

 Previous  Next  Finish  Cancel

1. General 2. Event 3. Plans 4. Dependents 5. Subsidies 6. Letter Inserts

Subsidy Schedule

Subsidy Schedule Start: 06/01/2008 Subsidy Schedule End: 06/30/2008

Subsidy Schedule Amount Type: Percentage Amount: 100.00 %


Insurance Type: Medical

Ok Cancel

Previous Next Finish Cancel

TIP: Subsidy Schedules can be entered for all plan types assigned to that QB. Users can enter multiple subsidy schedules for different time frames. Subsidy Schedules may be entered as a percentage or flat amount.

State Specific Document	
<input type="checkbox"/>	California Specific Rights Letter Insert
<input type="checkbox"/>	Connecticut Specific Rights Letter Insert
<input type="checkbox"/>	Minnesota Continuation Specific Rights Insert
<input type="checkbox"/>	Minnesota Life Specific Rights Letter Insert
<input type="checkbox"/>	Oregon Specific Rights Letter Insert
<input type="checkbox"/>	Texas Specific Rights Letter Insert

 Save

TIP: Users can select all appropriate inserts that will be added to the letter generation.

TIP: All Inserts are only user specified. COBRApont 2.1 does not automatically add inserts based on rules (i.e. QB Address - State).

TIP: Make sure to click the save button to save settings.

TIP: At any point of the Wizard past the 3rd Tab (Plan), the user may click “Finish” to save the record.

Dependent Events

Dependent Events are entered through the “Add a QB Wizard”.
On the Event Tab Select “Dependent Event”.

COBRApont will prompt the user to enter some additional information.

Employee Information:
Employee Name:
Employee SSN:

Second Events

Second Events are entered through the “Add a QB Wizard”.
Second Events may only be entered for Dependent Events.
On the Event Tab Select “Dependent Event”.
Select the Second Event Check Box.

COBRApoint will prompt the user to enter some additional information.

Second Event:
 Second Event
Original First Day of Cobra:

NOTE: *Be sure to enter First Day of COBRA (FDOC) and not the Original Qualifying Event date.*

NOTE: *If there were multiple plans with differing FDOC's, (which can occur when one plans was an Event Termination type and another plan was an End of Month Termination type) the later FDOC should be entered as Original First Day of COBRA.*

QB Profile Screen

The QB Profile screen is the first tab in the QB record that is displayed when the member is accessed. The fields displayed give the user a quick overview of information found in the QB record.

QB Information:

Name:	Robert Cali
Address:	12596 Ocean Way Los Almos, CA 98756
SSN:	879-65-2315
DOB:	9/14/1976
Individual ID:	
Phone:	
Email:	

QB Event Information:

Event Category:	Employee
Event Type:	Termination
Qualifying Event Date:	12/31/2007
Original Enrollment Date:	1/1/2002
Specific Rights Processed Date:	8/8/2008
2nd Event:	No
Legacy:	No
Latest Election PMD:	10/7/2008
1st Payment Latest PMD:	4/20/2008

QB Additional Information:

Disability Extension Approved:	No
Uses Health Coverage Tax Credit:	No
Conversion Letter Processed:	No
At Least 1 Dependent on QMCSO:	No
Last Subsidy Month:	
Registration Code:	
Registration Date/Time:	
User Name:	

Client / Client Division:

Client:	Letter Test Inc.	Client Division:	Letter Test Inc.
---------	------------------	------------------	------------------

Last Payment:

Postmark Date	Entered Date	Amount	Payment Method	Check #
3/6/2008	3/6/2008	\$510.00	Check	3258

Next Payment:

Premium Month	Amount Due	Latest PMD
5/2008	\$255.00	5/31/2008

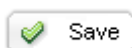
Plan Information as of: 9/12/2008

Insurance Type	Plan	First Day of COBRA	Last Day of COBRA	Coverage Level	Status	Bundle Name
Medical	Medical	01/01/2008	06/30/2009	EE Only	Terminated	

Update a QB Record

General Tab

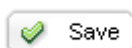
- Access a QB record
- Make desired changes
- Click the "Save" button



Qualifying Event Date

When it is necessary to change a QBs Qualifying Event Date proceed with the following.

- Access a QB record and go to the Event Tab
- Make desired changes
- Click the "Save" button



NOTE: *The Qualifying Event date can only be changed for a QB prior to the Specific Rights Notice being printed. If the SR notice has already printed, please contact your administrator.*

Reading the QB Plan Screen

Add a Plan		Elect Selected Plans								Refresh	
Insurance Type	First Day of COBRA	Last Day of COBRA	Months COBRA	Days Elect	Days 1stPmt	Days SubPmts	Status	Status Date	Election Postmark	Term Date	
<input type="checkbox"/> Medical	12/01/2007	11/30/2010	36	60	45	30	P	12/04/2007			
	Start Date	End Date	Plan Name	Policy Number	Coverage Level	Bundle Name					
<input type="checkbox"/> Edit	12/01/2007	11/30/2010	PPO Medical Plan	7097806	QB Only	Med/Dnt/V'sn - Option 1	Drop	Delete			
<input type="checkbox"/> Dental	12/01/2007	11/30/2010	36	60	45	30	P	12/04/2007			
	Start Date	End Date	Plan Name	Policy Number	Coverage Level	Bundle Name					
<input type="checkbox"/> Edit	12/01/2007	11/30/2010	Dental Option High	70870	QB Only	Med/Dnt/V'sn - Option 1	Drop	Delete			
<input type="checkbox"/> Vision	12/01/2007	11/30/2010	36	60	45	30	P	12/04/2007			
	Start Date	End Date	Plan Name	Policy Number	Coverage Level	Bundle Name					
<input type="checkbox"/> Edit	12/01/2007	11/30/2010	Vision Plan	u097809	QB Only	Med/Dnt/V'sn - Option 1	Drop	Delete			

When a QB is entered into COBRApont Last Day of COBRA (LDOC) will be displayed as the maximum date that this QB is COBRA eligible.

If a QBs plan status is TP, the Termination Date will be the day prior to the COBRA Qualifying Event Date of the plan.

All plans are sorted by Insurance Type (Medical, Dental, Vision...)

First Day of COBRA (FDOC) may differ from plan to plan, depending on the plan's Termination Type. If the QB experiences a Qualifying event on 11/12/2007, FDOC for an End of Month (EOM) plan would be 11/30/2007. FDOC for an Event plan would be 11/13/2007 and FDOC for a Washroll plan would be 10/31/2007.

Last Day of COBRA may also differ from plan to plan. It is calculated based on FDOC + Months of COBRA.

The following columns display either the default created by COBRApont based on federal COBRA regulations or if these fields were edited by the administrator.

- Months of COBRA is the maximum continuation period.
- Days Elect displays the number of days an election may be entered.
- Days 1st Pmt displays the number of days until QB has to bring his/her account to current.

- Days SubPmts displays the number of days the QB has for each monthly payment after the payment due date (1st of the month).
- Status column displays the plan status based on Insurance Type. This status can differ from plan to plan. See Plan Status Explained section for more details on statuses.
- Status Date displays the date the status last changed. This date may differ from plan to plan.
- Election Postmark shows the date the election for each plan was postmarked. This date may differ from plan to plan.
- The Termination Date shows the date that COBRApoint terminated the QB plan for none-payment, or the plan was terminated by a user with this effective date.

The checkbox next to the plan indicates whether the plan has been elected or not.

The Start Date of the plan indicates when the plan started for this QB. Multiple plans can be listed underneath an insurance type when the start dates differ and follow the End Date of the previous plan.

The End Date displays when this plan with this specific coverage level was ended.

The Plan Name shows the Plan as it was entered into COBRApoint. This is a clickable link and takes the user to the plan screen where the detailed information about this plan can be found.

The column Bundle Name indicates if the plan is part of a bundle or not.

Enter a Subsidy

- Access a QB record
- Select Subsidies Tab
- Click the “Add a Subsidy Schedule” Link
- Complete Subsidy Schedule
- Click the “OK” button

Subsidy Schedule

Subsidy Schedule Start: 06/01/2008 Subsidy Schedule End: 06/30/2008

Subsidy Schedule Amount Type: Percentage Amount: 100.00 %

Insurance Type: Medical

Ok Cancel

NOTE: *The following rules apply to subsidies:*

- *A subsidy may be entered as a Flat Amount or Percentage.*
- *A subsidy schedule may be entered for the full term of COBRA or only for certain months.*

- A subsidy schedule may be entered for specific plans
- The subsidy schedule may be used to “make up for” partial payments
- A subsidy can only be entered for a full month. If a Subsidy Schedule is entered for an Event Type plan which will be prorated the entire month should be entered. COBRApoint will NOT give “additional” days of COBRA if a Subsidy is entered for a full month.

View a Generated Letter

COBRApoint stores all letters within the record to which address it was sent. These PDF files may be retrieved at any time by accessing the QBs Communication Tab and clicking on the link of the appropriate letter.

Date/Time ▼	Type	Description	Page Count
09/19/2007 12:15PM	Letter	Enrollment Confirmation Notice	2
09/19/2007 12:14PM	Letter	45 Day Notice With No Payment	1
09/19/2007 12:11PM	Letter	COBRA Specific Rights Notice Letter	10

QB Plan Status Explained

P = Pending – QBs plan status is pending if they are still within their 60 or 45 day grace periods and have elected and not paid or elected and made a partial payment.

E = Enrolled – QBs plan status is enrolled if QB has elected and paid the first month of COBRA in full and possible subsequent months.

DE= Disability Extension – QBs plan status is disability extension if that QB qualifies for the 11-month Social Security Disability extension.

T= Terminated – QB can terminate for the following reasons:

- A QBs plan status can move from P to T when the 60-day election period has expired
- A QBs plan status can move from P to T when the 45-day grace period has expired
- A QBs plan status can move from E to T for the following reasons:
 - It's the QBs Last Day of COBRA
 - The QB fails to make a timely COBRA premium
 - The QB is covered on another plan
 - The QB is now entitled to Medicare
 - The employer no longer provides this plan
 - A payment was voided and the QB is now outside the 30-day payment grace period
- A QBs plan status can move from E to DE when a valid Disability Extension is entered and the QB is in last 11-months of COBRA coverage
- A QBs plan status can move from DE to T for the following reasons:

- It is the QBs Last Day of COBRA
- The QB fails to make a timely COBRA premium
- The QB is covered on other plan
- The QB is now entitled to Medicare
- The QB is no longer disabled after disability extension has begun
- The employer no longer provides this plan

QB Premiums Screen

Jane Widow - 124-59-8456 | Letter Test Inc.

Quick Search

Profile General Event Plans Dependents Subsidies Payments Premiums Letter Inserts								
Communications								
Next Payment Premium Month/Year: 04/2008 --- Last Postmark Date: 5/1/2008 Amount Due: \$841.50 --- Unallocated Amount: \$0.00 --- QB Owes: \$841.50								
Expand All Collapse All Refresh								
Premium Year/Month	Premium	Admin Fee	Subsidy	Owed	Paid	Still Owed		
2008/3	\$853.00	\$17.06	\$0.00	\$870.06	\$870.06	\$0.00		
<input type="checkbox"/>	Plan Name	Policy Number	Premium	Admin Fee	Subsidy	Owed	Paid	Still Owed
<input type="checkbox"/>	Medical	789456	\$825.00	\$16.50	\$0.00	\$841.50	\$841.50	\$0.00
	Postmark Date	Date Entered	Date Deposited	Payment Amount	Allocated Amount	Remitted	User	
	03/06/2008	03/06/2008	03/06/2008	\$50.00	\$9.88	<input checked="" type="checkbox"/>	theresa.allan@cobrapoint.com	
	03/06/2008	03/06/2008	03/06/2008	\$860.18	\$831.62	<input checked="" type="checkbox"/>	theresa.allan@cobrapoint.com	
<input type="checkbox"/>	Dental	123456	\$28.00	\$0.56	\$0.00	\$28.56	\$28.56	\$0.00
	Postmark Date	Date Entered	Date Deposited	Payment Amount	Allocated Amount	Remitted	User	
	03/06/2008	03/06/2008	03/06/2008	\$860.18	\$28.56	<input checked="" type="checkbox"/>	theresa.allan@cobrapoint.com	


NEW PLAN MEMBERS (NPMs)

Entering a NPM

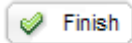
Within the Client Portal, click on the “Add a new NPM” link to launch the Wizard or access the “Add a new NPM Wizard” through the Wizards Tab or through the Members Tab.

Reports	Wizards	Favorites	Help
	Add a new QB Wizard		
	Add a new NPM Wizard		

NPM - New Plan Members

 Add a new NPM

- Follow the wizard
- Click the “Finish” button



NOTE: There can be multiple entries of the same NPM with the same SSN.

Tips for the “Add a New NPM Wizard”

1. General
2. HIPAA Cert Data

Client Name: Letter Test Inc. Division: Letter Test Inc.

Salutation: Choose... First Name: MI: Last Name:

Identification Information:

 SSN: _ - _
 Individual Identifier:

Contact Information:

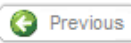



 Email:
 Phone: () _ - _ Phone 2: () _ - _

Mailing Address:

 Address:
 Address2:
 City: St: Zip:
 Country:
 Use '& Family' addressing for mailings

Other Data:

 Gender: Male Female
 Has become a QB
 Has waived all coverage
 Send General Rights letter when finished.

 Previous
Next 
 Finish
 Cancel

TIP: Entering the NPM will generate the Initial Notice of Rights under COBRA and HIPAA (General Rights) based upon the information entered.

TIP: The option of “Send General Right letter when finished” will always default and be checked. If choosing not to send the General Rights letter and sending a HIPAA Certificate, uncheck this box.

TIP: If the NPM has “Waived All Coverage” upon eligibility, checking this box will generate the Special Enrollment Rights under HIPAA letter. This letter is the last page of the General Rights letter, the Send General Rights letter box should always remain checked if the NPM has waived.

Other Data:

Gender: Male Female

Has become a QB

Has waived all coverage

Send General Rights letter when finished.

TIP: In the Mailing Address fields, if the NPM has elected family coverage with their election, the check box of “Use ‘& Family’ addressing for mailings” should remain checked. If the NPM elected single coverage, uncheck the box. This will determine the how the letter is addressed.

Mailing Address:

Address:

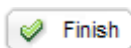
Address2:

City: St: Zip:

Country:

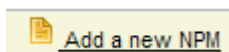
Use '& Family' addressing for mailings

Once the required fields and sections are completed, choose Finish at the bottom of the screen.

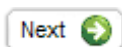


Entering a HIPAA Certificate (non-qualifying event)

Within the Client Portal, click on the “Add a new NPM” link to launch the Wizard or access the “Add a new NPM Wizard” through the Wizards Tab or through the Members Tab.



- Follow the wizard
- Click the “Next” on the bottom



TIP: The option of “Send General Right letter when finished” should be unchecked when entering HIPAA Cert Data.

Other Data:

Gender: Male Female

Has become a QB

Has waived all coverage

Send General Rights letter when finished.

Once the General Tab is completed, click “Next” to proceed to the Tab labeled “HIPAA Cert Data” and check the box labeled “Enter HIPAA Certificate data”.

1. General | 2. HIPAA Cert Data

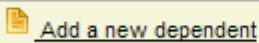

Enter HIPAA Certificate data

Original enrollment date:

Last day of coverage:

Medical plan:

Coverage level:

Dependents:

Full Name	Relationship	Original Enrollment Date	Last Day of Coverage
No records to display.			

Complete the HIPAA Cert Data screen to generate Certificate of Credible coverage for the employee and dependents, if applicable.

If dependents are applicable, they will need to be entered using the “Add a new dependent” option.

The screenshot shows a web application interface for entering HIPAA certificate data. At the top, there are two tabs: "1. General" and "2. HIPAA Cert Data", with the second tab selected. Below the tabs is a checkbox labeled "Enter HIPAA Certificate data" which is checked. The main form area contains several input fields: "Original enrollment date:" with the value "01/01/2006", "Last day of coverage:" (empty), "Medical plan:" with a dropdown menu showing "Medical", and "Coverage level:" with a dropdown menu showing "QB + Spouse". Below these fields is a section titled "Add a new dependent" with a "Refresh" button. Underneath is a table with columns: "Full Name", "Relationship", "Original Enrollment Date", and "Last Day of Coverage". The table contains one row: "HIPAA Spouse", "Spouse", "01/01/2006", and an empty cell. Below the table is a "Delete" button. To the left of the table is the label "Dependents:". Below the table is a "Add new dependent" form with fields for "Full name:", "Relationship:" (dropdown menu showing "Choose..."), "Original enrollment date:", and "Last day of coverage:". There are "Save" and "Cancel" buttons below this form.

Once this screen is complete click on the “Finish” button and the record will be complete.

To generate the Certificate of Credible Coverage, access the record entered, choose the HIPAA Cert Data Tab and choose the “Queue HIPAA Certification Letter”

Queue HIPAA Certification Letter

View a Generated Letter

COBRApont stores all letters within the record to which address it was sent. These PDF files may be retrieved at any time by accessing the NPMs Communication Tab and clicking on the link of the appropriate letter.

General		HIPAA Cert Data		Communications	
Date/Time	Type	Description	Page Count		
09/12/2008 04:49PM	Letter	COBRA General Rights Notice	4		

ADMINISTRATOR UTILITIES

Import Data Files

This utility enables the customer to import files of new QBs or NPMs based on file specifications provided by COBRApoint. After processing an upload file, a success/failure report will result.

- Select the Utilities Tab
- Click on Administrator Utilities
- Select Import
- Browse for the file to be imported on your local machine or network
- Click the Import File button

Import - Imports business objects from a CSV file

NOTE: *The uploaded file has to be in COBRApoint's predetermined file format. Contact your administrator for file specifications.*

The following rules apply:

- COBRApoint will reject records that have incorrect information.
- COBRApoint will reject records with missing information.
- COBRApoint will reject an entire file if any records are incorrect.

NOTE: *COBRApoint will display a Success/Failure message after import similar to the one below:*

Import - Imports business objects from a CSV file

Successfull Import!

Import Totals	
Category	# Processed
Lines Processed:	135
Total Errors:	0
Clients Imported:	1

REPORTS

Report Types

COBRApoint's main Reports Tab divides the report types into Standard Reports and Accounting Reports.

Standard Reports

- Member Status Report

The Member Status Report can be run real-time and system-wide. Data is sorted by client, then plan, then status and displays the members Full Name, Type, SSN, Coverage Description, Event First Day of Coverage, Termination Date and Monthly Premium.

Member Status						
Client Name:	Eldorados					
Division Name:	Eldorados East					
<hr/>						
Plan Name:	Delta Dental DPO					
Carrier Name:	Delta Dental					
Status:	E					
Full Name	Type	SSN	Coverage Description	Event First Day of Coverage	Termination Date	Monthly Premium
JACKSON, JACKIE	QB	789-45-6133	EE + Spouse	3/1/2008		\$25.00
<hr/>						
Plan Name:	UHC PPO MEDICAL					
Carrier Name:	UNITED HEALTHCARE					
Status:	E					

- Carrier Notification Report(Pending)

Carrier Notification Reports are run real-time and displays all unprocessed carrier notifications. The report lists the Client Name, Client Division and Carrier Contact. It displays Plan Name, Policy number, Carrier Name, Carrier notification Type, Name of the Member, SSN, Sex and Effective Date.

The following types will be displayed:

- Reinstatement (election)
- Termination
- Termination, dependent(s) only
- Disregard termination
- Address/Name Change
- Status (coverage level) change
- Plan added
- Plan add, dependent(s) only
- Disability extension
- Month-End Update

- Carrier Notification Report (Processed)

Carrier Notification Reports are run real-time and displays all processed carrier notifications. The report lists the Client Name, Client Division and Carrier Contact. It displays Plan Name, Policy Number, Carrier Name, Generated Date Time, Carrier notification Type, Name of the Member, SSN, Sex and Effective Date.

The following types will be displayed:

- Reinstatement (election)
- Termination
- Termination, dependent(s) only
- Disregard termination
- Address/Name Change
- Status (coverage level) change
- Plan added
- Plan add, dependent(s) only
- Disability extension
- Month-End Update

Processed Carrier Notifications Report

Client Name: Letter Test Inc.
 Division Name: Letter Test Inc.

Carrier Contact: Enrollment
 123596 M Street
 Omaha NE 68106
 Phone: (402) 333-3365
 Fax: (402) 333-3364
 Email: Enrollmant@BCBS.com
 Web Link:

Plan Name: Dental	Policy Number: 123456	Carrier Name: Blue Cross Blue Shield		
Generated Date Time: 6/19/2008 8:32 PM				
Carrier Notification Type: Plan add				
Name	SSN	DOB	Sex	Effective Date
PERESON102, TEST	XXX-XX-4321	5/21/1949	M	12/1/2008
Carrier Notification Type: Termination				
Name	SSN	DOB	Sex	Effective Date
Widow, Jane	XXX-XX-8456	12/17/1969	F	3/31/2008
Generated Date Time: 6/1/2008 1:00 AM				
Carrier Notification Type: Disregard termination				
Name	SSN	DOB	Sex	Effective Date
Doe, John	XXX-XX-6132	12/15/1969	M	3/6/2008
Name	SSN	DOB	Sex	Effective Date
Widow, Jane	XXX-XX-8456	12/17/1969	F	3/6/2008
Widow, Janny		Dependent Child	F	
Widow, Jonny		Dependent Child	M	

- Proof Of Mail

The Proof Of Mail report run real-time by a date and provides a list of letters that were generated on the specified date. The report displays the Client Name, Client Division and is sorted File Name, Letter Name, Addressee and Address.

Proof Of Mail Report

Client: Urban Wine Company
 Client Division: Urban Wine Company

File Name: 20080915_2Pg_DX.PDF (Only Letters Requiring "Proof of Mail" are Listed)

Letter Name	Addressee	Address	City	ST	Postal Code	Country
COBRA Termination Notice	Mr. LEGACY DEPENDEVENT	2900 MAIN	OMAHA	NE	68106	

Total Number of Mailings in File 20080915_2Pg_DX.PDF Requiring "Proof of Mail": 1

Grand Total Number of Mailings Requiring "Proof of Mail": 1

- Plan Rate Renewal

The Plan Rate Renewal report is run real-time shows plans that renew in the next 30,60,90 days or have renewed within the past 30,60,90 days. The report displays Client Name, Client Division and the Criteria. It is sorted by Plan Name, Policy Number, Carrier, Enrollment Contact, Phone, Effective Date, End Date and Renewal Date.

Plan Rate Renewal Report

Client Name: Letter Test Inc.
12369 Maple St
Omaha, NE 68106

Division Name: Letter Test Inc.
12369 Maple St
Omaha, NE 68106

Renewal Dates That Occurred Within the Previous 90 Days

Plan	Policy Number	Carrier	Enrollment Contact	Phone	Effective Date	End Date	Renewal Date
testmedical	99	Blue Cross Blue Sheild	Enrollment	(402) 333-3365	6/1/2007		6/1/2008
Renewal Dates That Occurred Within the Previous 90 Days Total:							1
Letter Test Inc. Division Total:							1

- **Paid Through Report**

The Paid Through Report is run real-time and shows the paid through date of all currently enrolled members in COBRApoin. The report displays Client Name, Client Division and the Member Type. It is sorted by Name, SSN, Qualifying Event Date and Paid Through Date.

Paid Through Report

9/15/2008 4:25 PM

Client Name: Urban Wine Company

Division Name: Urban Wine Company

Member Type: Qualified Beneficiary

Name	SSN	Qualifying Event Date	Paid Through Date
5500, TEST	005-52-2222	4/21/2008	9/30/2008
TEST, VERIZON	098-95-6532	8/15/2008	10/31/2008
Qualified Beneficiary Total:			2
Division Total:			2
Client Total:			2
Grand Total:			4

- **Generated Letters Summary Report**

The Generated Letters Summary Report is run real-time and shows a total of all system generated letters for a date or date range. The report displays Client Name and Client Division. It is sorted by Letter Description and Quantity.

Generated Letters Summary Report

Client Name: Letter Test Inc.

Division Name: Letter Test Inc.

Letters	
Description	Qty
COBRA General Rights Notice	1
Letters Total:	1
Letter Test Inc. Total:	1
Letter Test Inc. Total:	1

Generated Letters Summary Report - Grand Totals

Grand Total Letters:	1
Grand Total Inserts:	0
Grand Total Letters and Inserts:	1

- Generated Letters Detail Report

The Generated Letters Detail Report is run real-time and shows the detail of each system generated letter for a date or date range. The report displays Client Name and Client Division. It is sorted by Letter Type, Addressee, Member Type, Date Generated and Quantity.

Generated Letters Detail Report

Client Name: Letter Test Inc.

Client Division Name: Letter Test Inc.

Letters		
Letter Type:	COBRA General Rights Notice	
Addressee	Member Type	Date Generated
Mr. TEST NPM25 & Family	New Plan Member	9/12/2008 4:49 PM
COBRA General Rights Notice	Letter Type Total:	1
Letters	Total:	1
Letter Test Inc.	Division Letter Total:	1
	Division Insert Total:	0
	Division Total:	1
Letter Test Inc.	Client Letter Total:	1
	Client Insert Total:	0
	Client Total:	1

Generated Letters Detail Report - Grand Totals

Grand Total Letters:	1
Grand Total Inserts:	0

Accounting Reports

- Subsidy Schedule Report

The Subsidy Schedule Report displays a list of Members that have subsidized premiums within a certain date range. This report displays the following Client Name and Client Division. It is sorted by Start Date, End Date, Type, Name, SSN, Insurance Type, Type and Subsidized Portion.

Subsidy Schedule Report

Starting Date: 1/1/2008

Ending Date: 9/16/2008

Client Name: Letter Test Inc.

Division Name: Letter Test Inc.

Start Date	End Date	Type	Name	SSN	Insurance Type	Type	Subsidized Portion
3/1/2008	4/30/2008	QB	CB, Nate	124-57-8963	Medical	Percentage	25.00%
3/1/2008	4/30/2008	QB	NPO, Alex	658-93-2147	Medical	Percentage	25.00%
3/1/2008	4/30/2008	QB	PN, Tori	159-35-7462	Medical	Percentage	25.00%
6/1/2008	6/30/2008	QB	2002, TEST	009-09-8333	Medical	Percentage	100.00%

- Remittance Report

The Remittance Report works much like a General Ledger system for the administrator. Your administrator has the flexibility to remit on whatever frequency is chosen and may choose to remit all non-remitted allocated premiums or only those non-remitted allocated premiums through a specific premium month. Please contact your administrator for more details regarding the remittance process.

Remittance Report

Client DBA Name: We'll fix you

Remittance Period Beginning: 9/4/2007 3:57:52 PM

Client Name: Jason's Repair Shop

Ending: 9/4/2007 4:01:50 PM

Includes Premium Months Through: 7 /2007

Member Paid Amounts and Subsidized Admin Fees To Remit for Premium Month: 7 /2007

Plan: Billy's Medical Plan		Carrier: Health-Mart of Nebraska				Admin Fee Paid by		Member Paid	Total To
Member Name	SSN	Premium	Admin Fee	Member Paid	Subsidy	Member	Subsidy	To Remit	Remit
Hector, Johnny	466-10-6456	\$100.00	\$2.00	\$102.00	\$0.00	\$2.00	\$0.00	\$100.00	\$100.00
Plan Total:		\$100.00	\$2.00	\$102.00	\$0.00	\$2.00	\$0.00	\$100.00	\$100.00
Plan: Vision Source		Carrier: BCBS				Admin Fee Paid by		Member Paid	Total To
Member Name	SSN	Premium	Admin Fee	Member Paid	Subsidy	Member	Subsidy	To Remit	Remit
Carter, Linda	354-65-4610	\$25.00	\$0.50	\$25.50	\$0.00	\$0.50	\$0.00	\$25.00	\$25.00
Plan Total:		\$25.00	\$0.50	\$25.50	\$0.00	\$0.50	\$0.00	\$25.00	\$25.00
Premium Month Total:		\$125.00	\$2.50	\$127.50	\$0.00	\$2.50	\$0.00	\$125.00	\$125.00

Client Totals:	Remittance Adjustment Total:	\$0.00
	Subsidized Admin Fees Total:	\$0.00
	Member Paid To Remit Total:	\$125.00
	Client Remittance Total:	\$125.00

Report View Set-up

To view PDF reports in their own window takes the following steps:

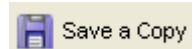
- Close Applications
- Launch Adobe Reader
- Select "Edit"
- Select "Preferences"
- Select "Internet"
- Uncheck check box "Display PDF in browser"
- Click OK


NOTE: Adobe may ask you to restart your system.

Exporting Reports

All reports generated by the client portal are exportable to PDF and CSV.

After running a report, the user may choose to save it as PDF file by clicking the button within Adobe.



By clicking the  button, the report can be exported to CSV and then saved either as .csv or .xls file.

Manually Reprint Letters

COBRApoint stores any letter generated within the associated record in the Communications Tab and may be reprinted at any time from the Member record.

NOTE: *Re-printing a letter will NOT reset any timeframes associated with the letter.*

- Access the Communications tab
- Select the letter to be reprinted
- Click on the “Print” button in Adobe

Date/Time	Type	Description	Page Count
06/01/2008 01:00AM	Letter	COBRA Termination Notice	4
03/06/2008 12:36PM	Letter	Reinstatement Notice	1

