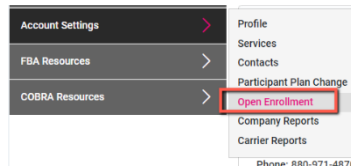


isolved Benefit Services has enhanced your COBRA Online Portal to offer you with added ability to setup the information for us to process your COBRA Open Enrollment for your COBRA participants and those within their election period. Please follow these steps to set up your Open Enrollment packets.

Note: You must update all plans/rates prior to being able to process your Open Enrollment. You will not be able to process the request for the Open Enrollment packets unless the plans and rates have been updated.

Start a New Packet

Click on "Start New Packet" to begin the Open Enrollment process.



Account

Open Enrollment Packet

Select the customer to create the packet for the Open Enrollment, from the drop-down box.

If your plans/rates have not been updated, you will be prompted to update these prior to completing the Open Enrollment packets.

Open Enrollment Packet

Page 1 of 3

Our records indicate that your COBRA-eligible benefits renew in August 2023. You will need to update those within your COBRA Online Portal before you can begin your Open Enrollment packet. Please click on the [Plans and Rates](#) in the menu to the left to renew your plans. If you have any questions, please contact your COBRA Customer Service Representative at qareporttest@isolvedhcm.com or 866-320-3040.

Contact

Select who will be listed on the packets for benefit questions.

Note: If you do not see a contact listed, please feel free to update us with a [Contact Change Form](#).

Parameters

Is this an active or passive enrollment?

- Passive
- Active

It will be possible to select default plan that participants should be moved to after the enrollment period on next screen.

Type of Open Enrollment

Select the type of Open Enrollment process you will be doing – Passive or Active.

Definitions of the two options:

Passive: Allows employees to roll over their benefits from the previous year without requiring them to assess their plan options or learn more about their benefits.

Active: Requires employees to choose a benefits plan, regardless of their coverage from a previous year
Deadline to Return Open Enrollment

Due Date

Select from two options for the participants to return Open Enrollment selections. You can either select (1) Two weeks from when we print the packets or (2) A date of your choice, must be more than 12 business days into the future.

What is the deadline date for the Open Enrollment period?

- Two weeks from printed date
- The date you have pre-selected

(this date must be more than 12 business days from today's date.)
Once submitted for mailing, your open enrollment packets will mail and will be available to view on the online portal.

Attachments

Printed: You can upload a Summary of Benefits and/or variable rate tables to be included in the Open Enrollment packets. The documents must be in a PDF format and cannot exceed a maximum file size of 20 MB and more than 32 pages.

Printed Attachments
If you have a Summary of Benefits and Coverage or variable rate table that you would like to include within the Open Enrollment mailing, you may upload the single document here.
Document format requirements must be in a .pdf and the size cannot exceed a maximum file size 20MB with a page limit of 32 pages.

File Name: Type: Size:

Electronic: You can upload multiple documents that will not be part of the mailed packet but available to participants within their online portal. Document format requires these to be a pdf and the size cannot exceed a maximum file size of 20MB with a page limit of 32 pages.

Electronic Attachments
If you have a Summary of Benefits and Coverage or variable rate table that you would like to include within the Open Enrollment mailing, you may upload the single document here.
Document format requirements must be in a .pdf and the size cannot exceed a maximum file size 20MB with a page limit of 32 pages.

File Name: Type: Size:

Once you have completed all required fields, click on "Next" at the top of the form.

Add Group

Click on "Add Group".

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Plan Group

Group Name:

You have selected Passive enrollment, please provide the default plan that participants should be moved to after the enrollment period has been completed.

Click on "Add" to provide details on default plans. If there are more than one default plan, click on "Add" to provide all the details. E.g. BCBS Medical HMO now defaults to UHC Medical HMO; CIGNA Dental now defaults to Delta Dental.

Our Open Enrollment process allows you to create multiple groups based upon your requirements and need to submit multiple mailings. The first step is to click on "Add Group". You will be asked to assign a name to this group (e.g., ABC Company Hourly, ABC Company Salary, etc.). This will help you identify any packets you have created. For example, certain groups may only be eligible for certain plans.

Select the plans and the participants to receive the mailing and submit, then repeat and process for your next subset.

Passive Enrollment: If you selected Passive enrollment, you will be prompted to select the default plan(s) that participants should be moved after the enrollment period has been completed.

Click on “Add” to provide details on default plans. If there is more than one default plan, click on “Add” to provide all the details. E.g. BCBS Medical HMO now defaults to UHC Medical HMO; CIGNA Dental now defaults to Delta Dental.

Default Coverages		
From	To	Remove
PRIORITY HEALTH MEDICAL	AETNA CH POS II CAR	X

Add Plans

Click on “Add Plans” to select the plans that you want to include in this group’s Open Enrollment packet.

Enter the date for the plans that you need to be available, (e.g. new plans begin 01/01/2020), enter that as the date and click load. Then either click on the “select all” check box at the top or select each plan to offer on this Open Enrollment packet for this group of participants. Once you have your selections complete, click on “Select”.

Selected Plans

Plan	Coverage	Option	Start Date	End Date	Rate	Remove
No data						

Page 1 of 1 (0 items) < 1 >

ADD PLANS

Click on “Add Plans” to select the plans that you want to include in this group’s Open Enrollment packet. You will enter the date for the plans that you need to be available, (e.g. new plans begin 10/1/2019) and click load. Then either click on the “select all” check box at the top, or select each plan to offer on this Open Enrollment packet for this group of participants. Once you have your selections complete, click on “Select”.

If you need to “remove” any click on the red “X” to remove them from the plans to offer on the Open Enrollment packet. You can also filter by plan, coverage, option, start or end date or the rate.

Select the beginning of the plan year for the plans to show in the packet, e.g., 07/01/2023 and then click on “Load”.

Open Enrollment Packet - Add Plans

Load plan available on: 7/1/2023

Available Plans

Plan	Coverage	Option	Start Date	End Date	Rate	
AETNA	CH POS II CAR	EE-CHILD	7/1/2023	6/30/2024	\$2,039.99	<input type="checkbox"/>
AETNA	CH POS II CAR	EE-CHILDREN	7/1/2023	6/30/2024	\$2,039.99	<input type="checkbox"/>
AETNA	CH POS II CAR	EE-SP/IDOM PART	7/1/2023	6/30/2024	\$2,266.66	<input type="checkbox"/>
AETNA	CH POS II CAR	EMPLOYEE ONLY	7/1/2023	6/30/2024	\$1,019.99	<input type="checkbox"/>
AETNA	CH POS II CAR	FAMILY	7/1/2023	6/30/2024	\$2,575.76	<input type="checkbox"/>

Select the plans to show within this group/packet for the Open Enrollment letter.

You can filter the plans by the Plan Name, Coverage, Option, Start & End Date or the Rate.

Once all the plans have been selected to provide in the packet, click on “Select”.

Available Plans

Plan	Coverage	Option	Start Date	End Date	Rate	
AETNA	CHOICE POS II	EE-CHILD	7/1/2023	6/30/2024	\$2,039.99	<input checked="" type="checkbox"/>
AETNA	CHOICE POS II	EE-CHILDREN	7/1/2023	6/30/2024	\$2,039.99	<input checked="" type="checkbox"/>
AETNA	CHOICE POS II	EE-SP/IDOM PART	7/1/2023	6/30/2024	\$2,266.66	<input checked="" type="checkbox"/>
AETNA	CHOICE POS II	EMPLOYEE ONLY	7/1/2023	6/30/2024	\$1,019.99	<input checked="" type="checkbox"/>
AETNA	CHOICE POS II	FAMILY	7/1/2023	6/30/2024	\$2,575.76	<input checked="" type="checkbox"/>

If you need to “remove” any selected plans, click on the red “X” to remove the plans that you do not want to offer in the Open Enrollment packet.

Selected Plans						
Plan	Coverage	Option	Start Date	End Date	Rate	Remove
AETNA	CHOICE POS II	EE+CHILD	7/1/2023	6/30/2024	\$2,039.99	X
AETNA	CHOICE POS II	EE+CHILDREN	7/1/2023	6/30/2024	\$2,039.99	X
AETNA	CHOICE POS II	EE+SP/DOM PART	7/1/2023	6/30/2024	\$2,266.66	X
AETNA	CHOICE POS II	EMPLOYEE ONLY	7/1/2023	6/30/2024	\$1,019.99	X
AETNA	CHOICE POS II	FAMILY	7/1/2023	6/30/2024	\$2,575.76	X

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ADD PLANS

Add Participants

Click on “Add Participants” to select the participants that will be offered the selected plans through this Open Enrollment packet. Then either click on the “select all” check box at the top or select each participant to mail this Open Enrollment packet, for this group of participants.

Selected Participants					
Name	Type	Age	Gender	State	Remove
No data					

Page 1 of 1 (0 items) < 1 >

ADD PARTICIPANTS

Available Participants

Name	Type	Event Date	Age	Gender	State	
ABRAHAM L MOLINA	Continuee	6/30/2022	61	MALE	FL	<input checked="" type="checkbox"/>

REFRESH **SELECT** **CANCEL**

Once you have your selections complete, click on “Select”.

The participants will be anyone active on COBRA, participant(s) who have elected but still within 45-day period to pay or within their 60-day election period. Select the participants that should receive this packet.

Once you have your selection, if you need to “remove” any click on the red “X” to remove them from the plans to offer on the Open Enrollment packet.

Selected Participants					
Name	Type	Age	Gender	State	Remove
ABRAHAM L MOLINA	Continuee	61	MALE	FL	X

Page 1 of 1 (1 items) < 1 >

ADD PARTICIPANTS

After you have selected your Plans and Participants, you can “Preview” what your Open Enrollment packet will look like prior to us printing. *isolved* Benefit Services recommends reviewing this packet to confirm all the data is accurate.

Open Enrollment Packet

Plan Group

Group Name: Union Group

Template: Open Enrollment.Active.Template.Age.Banded

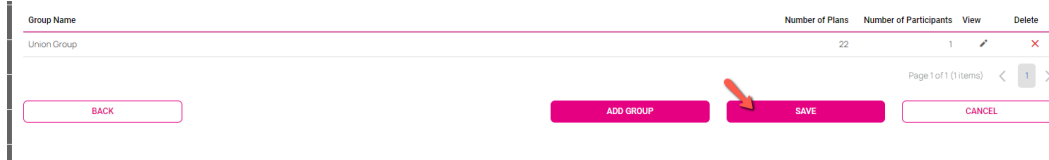
PREVIEW

Once all areas have been completed, click on “Accept”.

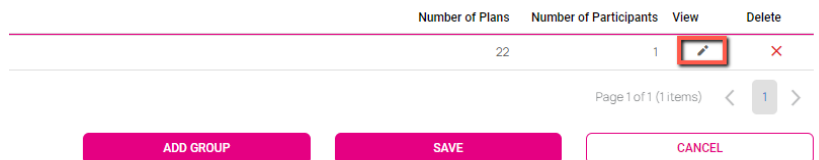


Save Groups

Click on “Save” to save this group. If you need to create another – different – group, repeat the steps from “Add Group” forward. Once all the groups have been created, click on “Save”.



If you need to edit a group, click on the edit option (pad of paper with pencil icon).



If you need to remove one and reprocess, click on the red “X”.

Open Enrollment Packets Submission to *isolved* Benefit Services

Once all the groups have been completed, you will see them under the Open Enrollment Packets.

To complete the process, click on “Submit” for the information to be uploaded to *isolved* Benefit Services.

Generated On	Printed On	Status	Submit for Printing	View	Edit	Delete
		Started	Submit			
		Started	Submit			
		Started	Submit			

When *isolved* Benefit Services prints your packets, you will receive a report, Open Enrollment Notices Mailed Report, of all packets mailed the following day.

Status

Within your Online Portal you can check the status of your Open Enrollment mailing at any time. You may see any of the following:

Started - Packets have not been submitted to *isolved* Benefit Services, but you have started the process in the Online Portal.

Generated - Packets sent to *isolved* Benefit Services for processing/printing/mailed.

Printed - Packets that have been printed by *isolved* Benefit Services and ready to be mailed. This will also queue a report to you of the information on who is receiving the packets.

If you have any questions regarding the online submission of Open Enrollment within the Online Portal, please contact a member of the Customer Service Team by calling 866-320-3040 or via email at cmail@isolvedhcm.com.