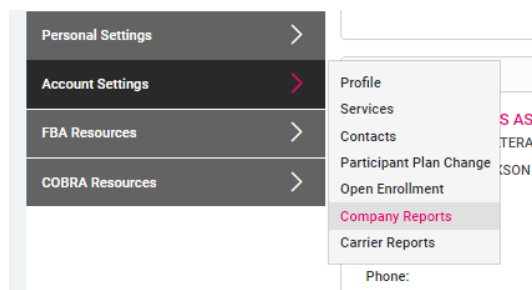


A “Super User” is a user with special privileges to administer and maintain data. isolved Benefit Services is excited to provide our primary contacts with “Super User” access within our COBRA portal. This allows you to make changes to your authorized contact list. Part of this access is the ability to make changes to the contacts and the reports assigned to those contacts.

## Company Reports Changes

To review who is receiving reports for your account, within the menu on the left, click on “Company Reports Sent To” under Account Settings.



Here you can view any of your Account Contacts and the reports that they are set up to receive.

**\*\*Note\*\*** You can sort this list by Contact Name or Report Name to assist with the information. This does not include any changes/reports for carriers. That is listed under the Carrier Reports Sent To section.

## Account Reports

Contact	Report	Format	Delivery Methods
Kristin Marteen	Blanket Mailing Notices Mailed Report	PDF	Downloaded from website
Juli Hanshaw	Client Continuee Participant Status Rep...	PDF	Print report on specified printer
AAAADFGSFDGDF AAAADFGSFDGDF	Client Payments on Expired Plans	PDF	Downloaded from website
CALVIN SMITH	Client Payments on Expired Plans	PDF	Downloaded from website
Kristin Marteen	Client Payments on Expired Plans	PDF	Downloaded from website
NATALIA WRIGHT	Client Payments on Expired Plans	PDF	Downloaded from website
NIM MICHAEL	Client Payments on Expired Plans	PDF	Downloaded from website
QWE QWE	Client Payments on Expired Plans	PDF	Downloaded from website
RAQUERECO ZEPEDA	Client Payments on Expired Plans	PDF	Downloaded from website
TEST TEST	Client Payments on Expired Plans	PDF	Downloaded from website

ADD EDIT DELETE

Within this area, you can “Add”, “Edit” or “Delete” a report for a contact.

## Add a New Report for a Contact

Click on “Add” button.

### Account Reports

Contact	Report	Format	Delivery Methods
Kristin Marteen	Blanket Mailing Notices Mailed Report	PDF	Downloaded from website

ADD EDIT DELETE

The drop down will show the contacts that you have set up for your account. If you do not see a contact, please click on the “Contacts” in the left menu and add the contact first.

Once you have selected the contact, the reports that have not been assigned to that contact can be selected. The Report format can be selected as well – default will be PDF -however some reports are available in Excel.

Once you have selected the reports and report format, click on “Save”.

<input type="checkbox"/>	Name	Format	Delivery Method
<input type="checkbox"/>	Client Payments on Expired Plans	PDF	Download Center
<input checked="" type="checkbox"/>	Daily Status Change Report	PDF	Download Center
<input type="checkbox"/>	Subsidy Premium & Refund Report	PDF	Download Center
<input type="checkbox"/>	COBRA Notices Mailed Report	PDF	Download Center
<input checked="" type="checkbox"/>	Plans and Rates Renewal Email	PDF	Download Center
<input checked="" type="checkbox"/>	Participant Status Report	PDF	Download Center
<input type="checkbox"/>	Rate Renewal Report	PDF	Download Center
<input type="checkbox"/>	Subsidy Confirmation Report	PDF	Download Center

## Edit a Report for a Contact

Click on “Edit” button.

## Account Reports

Contact	Report	Format	Delivery Methods
WARNETTE NEVRAJINE	Client Payments on Expired Plans	PDF	Downloaded from website
WARNETTE NEVRAJINE	COBRA Notices Mailed Report	PDF	Downloaded from website
WARNETTE NEVRAJINE	Daily Status Change Report	PDF	Downloaded from website

User: NATALIA WRIGHT

Report: DSC

Export Format: CSV

Delivery Method: PDF, XLSX Excel

If someone is receiving a report that is now being sent PDF and you would like them to receive it in Excel format, this is where you are able to make that change.

Once you have selected format change, click on “Save”.


# Company Report Changes



## Delete a Report for a Contact

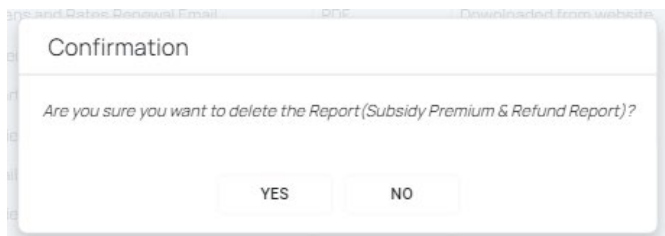
Select the Contact Name and the corresponding report, then click on “Delete” button.

## Account Reports



Contact	Report	Format	Delivery Methods
WARNETTE NEVRAJINE	Client Payments on Expired Plans	PDF	Downloaded from website
WARNETTE NEVRAJINE	COBRA Notices Mailed Report	PDF	Downloaded from website
WARNETTE NEVRAJINE	Daily Status Change Report	PDF	Downloaded from website
WARNETTE NEVRAJINE	Subsidy Premium & Refund Report	PDF	Downloaded from website

You will be promoted to confirm you are requesting to remove the selected report for the contact.



Confirmation

Are you sure you want to delete the Report (Subsidy Premium & Refund Report)?

YES NO

**\*\*Note\*\*** There are certain reports that you will not be allowed to remove completely from the system – as they provide details to activity for your account.

All report changes are made in real-time. For assistance with making changes to a contact, please reach out to your Customer Support Representative at 866-320-3040 or via email at [crmail@isolvedhcm.com](mailto:crmail@isolvedhcm.com).