isolved Benefit Services

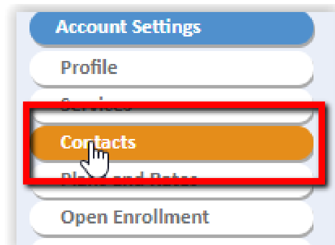
Super User Guide

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. Please review the authorized contacts for your account(s) and make any necessary updates. Changes you make online are saved in real-time.

As the “Super User” you will receive an email confirmation for any changes you make to contacts within the COBRA Online Portal. Please review those to confirm all changes were made correctly.

Contact Changes

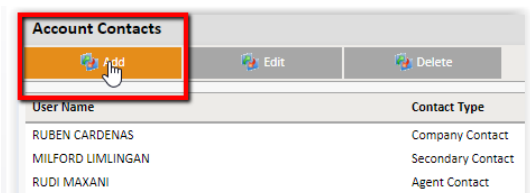
To review your authorized contacts, within the menu on the left, click on “Contacts” under Account Settings.



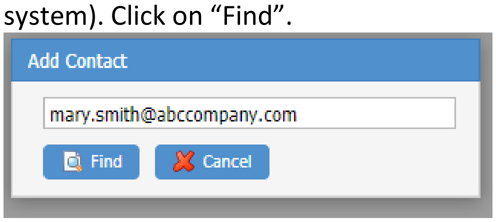
You will then see the authorized contacts for your account. This will include secondary contact; agent contact along with any third-party reporting contacts. If you need to add, edit or remove any contacts, you can take that action from this page.

Add a Contact

Click on “Add”.

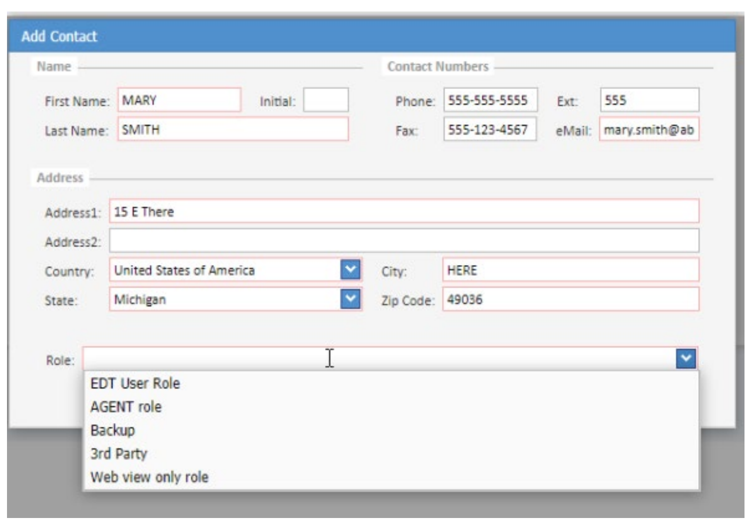


Enter the contact’s email address (this allows isolved Benefit Services to search for the user within our system). Click on “Find”.



If the user’s email address is not in our system, you will be provided with a form to fill out the user’s information (the email address you entered with be automatically populated). Fill in the contact’s name, phone number, fax number and address.

At the bottom of the form, you will select the role in which this contact will be set up. If you are unsure of the roles, click on the link to view the contact role definitions that isolved Benefit Services uses.



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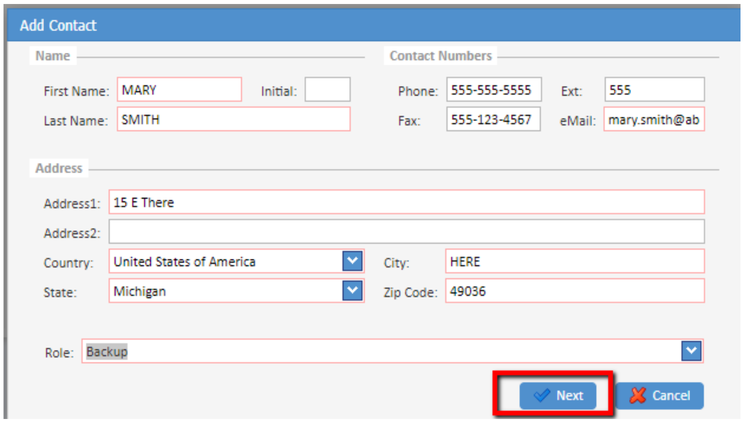
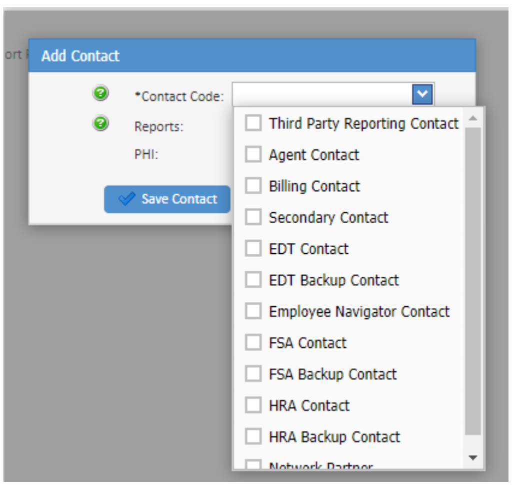
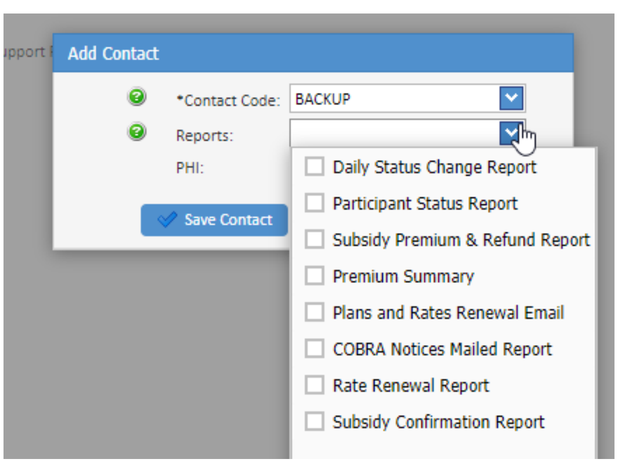
Once you have entered all the contact's information, click on "Next".



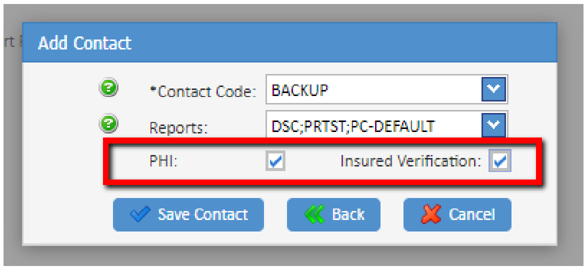
The next section is where you set up the Contact Code for the contact.



Once you have selected the Contact Code, select any reports you would like this contact to receive.

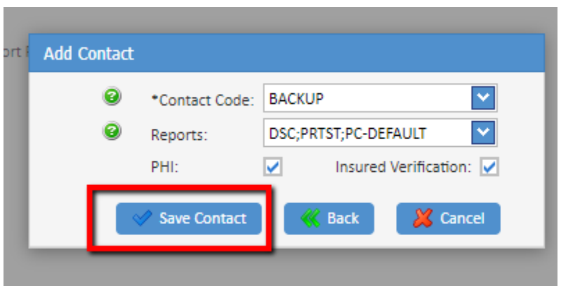


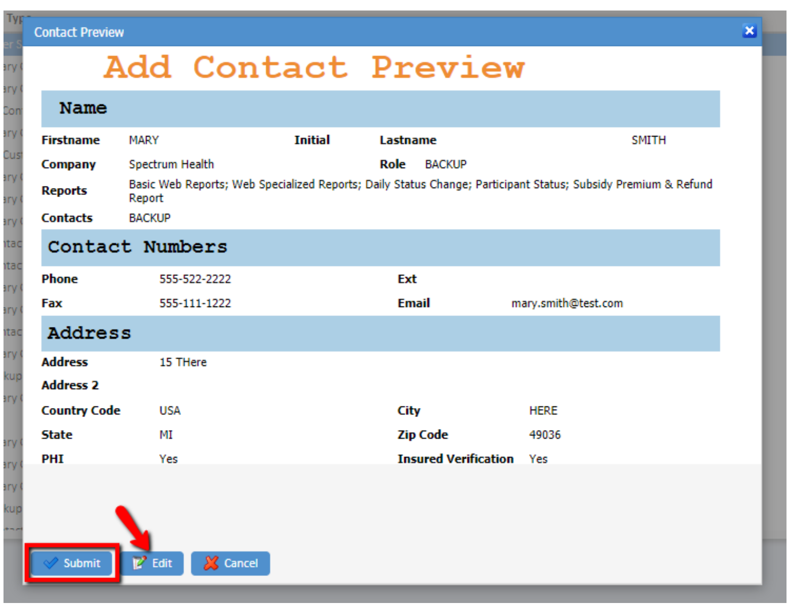
You can also select if this contact should also be marked as a PHI contact and/or receive our request for the number of insured verification emails.



If you have any questions on the Contact Code or Reports, click on the question mark in green to find a definition of each area.

Once you have completed this information, click on “Save Contact”





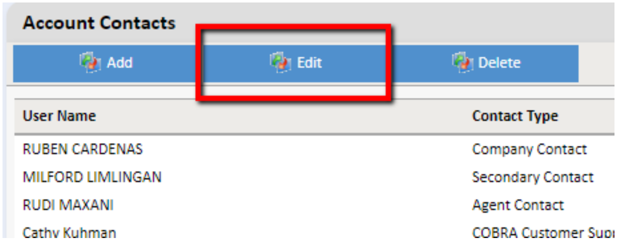
You will then have a preview of the data you entered for this contact. Please review. If the data is correct, click on “Submit”. If you need to change any information, click on “Edit”. If you want to cancel the full process, click on “Cancel”.

The new user will be sent an email to initiate their log in for the COBRA Online Portal (if they are brand new to our system). The email will provide them with the account(s) name and number they were setup as a user. They will also receive links to a COBRA Portal Quick Start Guide, Customer Support phone and email information.

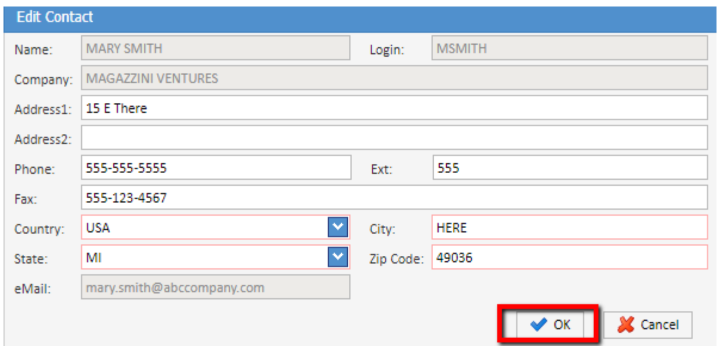
The link to activate their login will be available for 24-hours. If this is someone who has already been provided access, they would continue to use the same username and log in for the additions/changes to new account access.

Edit a Contact

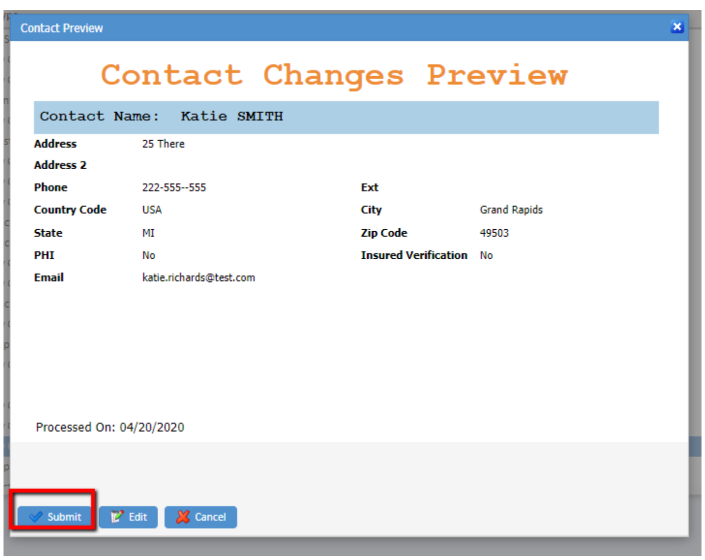
To edit a current contact's information (e.g. change a last name or email address), click on "Edit".



You will then be prompted with the form to change the contact's data including address, last name and/or email address. Once you have completed the changes, click on "OK".

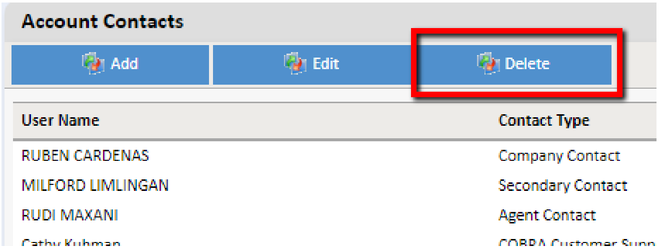


You will then see a "Contact Changes Preview" to confirm your changes are correct. If everything is correct, click on "Submit".

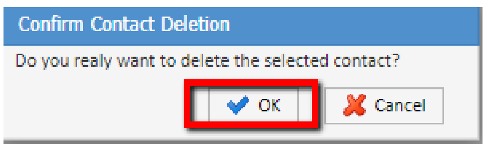


Delete a Contact

To remove a contact on your authorized contact list, click on “Delete”.



You will receive a prompt to “Confirm Contact Deletion”. If you are sure you want to delete the selected contact, click on “OK”.

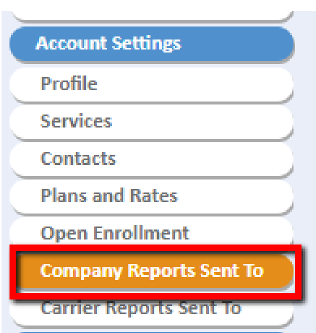


Note: You can see your COBRA or FBA Customer Support Rep listed here as well, however, you do not have the ability to change your support representative.

All contact 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.

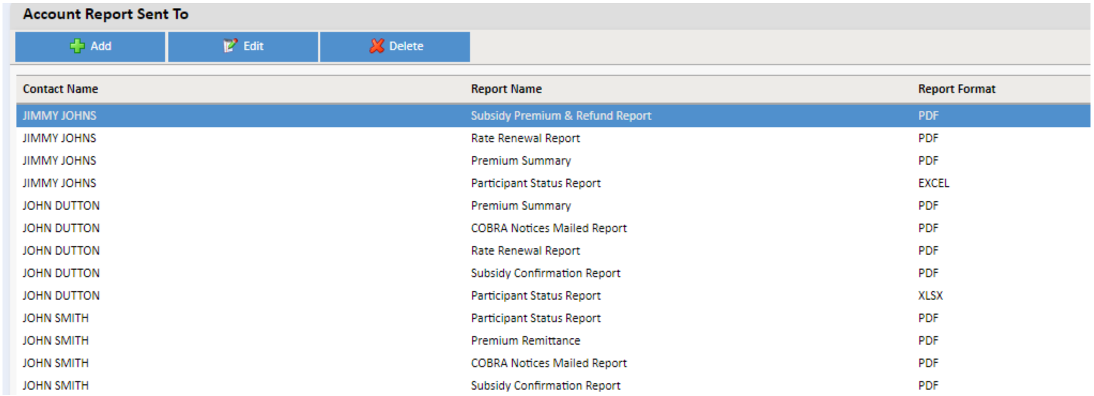
Company Reports Changes

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 Report Sent To

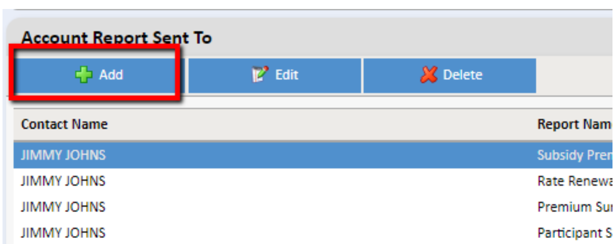
Add | Edit | Delete

Contact Name	Report Name	Report Format
JIMMY JOHNS	Subsidy Premium & Refund Report	PDF
JIMMY JOHNS	Rate Renewal Report	PDF
JIMMY JOHNS	Premium Summary	PDF
JIMMY JOHNS	Participant Status Report	EXCEL
JOHN DUTTON	Premium Summary	PDF
JOHN DUTTON	COBRA Notices Mailed Report	PDF
JOHN DUTTON	Rate Renewal Report	PDF
JOHN DUTTON	Subsidy Confirmation Report	PDF
JOHN DUTTON	Participant Status Report	XLSX
JOHN SMITH	Participant Status Report	PDF
JOHN SMITH	Premium Remittance	PDF
JOHN SMITH	COBRA Notices Mailed Report	PDF
JOHN SMITH	Subsidy Confirmation Report	PDF

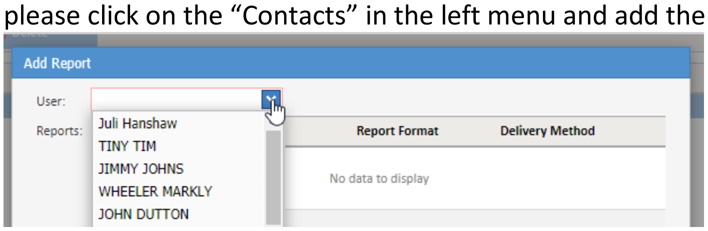
Within this area, you can “Add”, “Edit” or “Delete” a report for a contact.

Add a New Report for a Contact

Click on “Add” button.

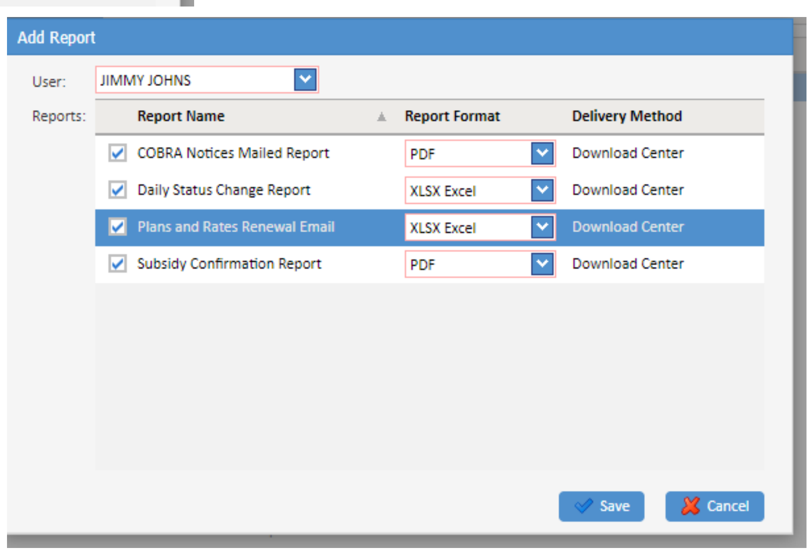


The drop down will show the contacts that you have set up for your account. If you do not see a contact, please click on the “Contacts” in the left menu and add the contact first.



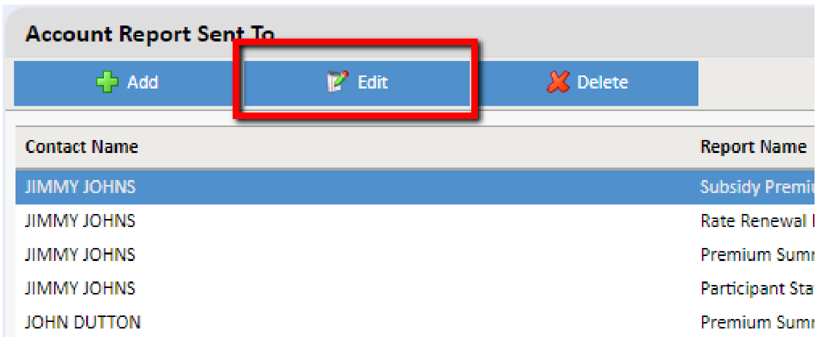
Once you have selected the contact, the reports that <u>have not</u> been assigned to that contact can be selected. The Report format can be selected as well – default will be PDF -however some reports are available in Excel.

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

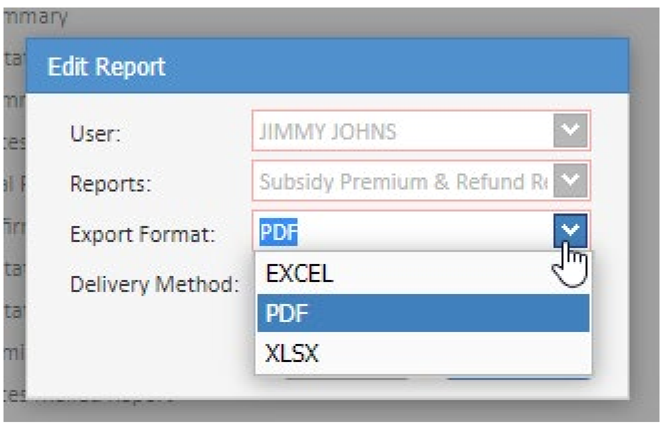


Edit a Report for a Contact

Click on “Edit” button.



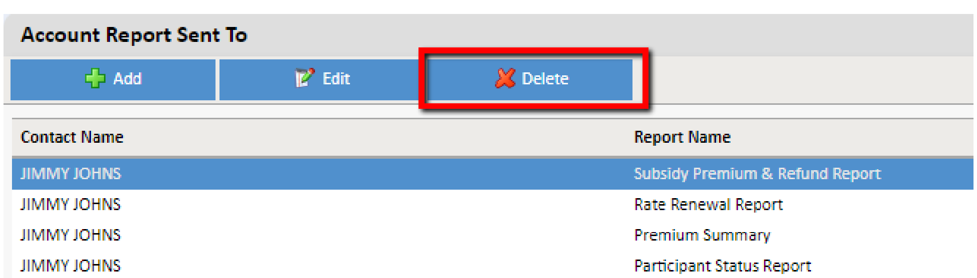
If someone is receiving a report that is now being sent PDF and you would like them to receive it in Excel format, this is where you are able to make that change.



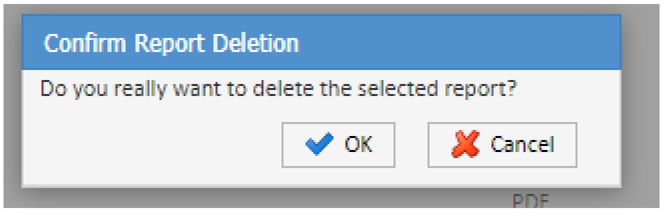
Once you have selected format change, click on “Save”.

Delete a Report for a Contact

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



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



***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.