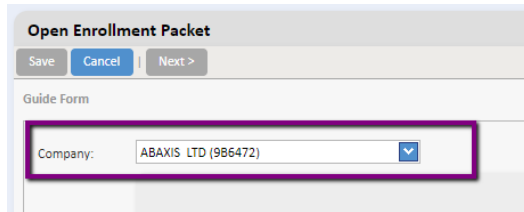
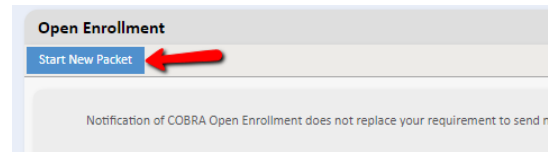


Infinisource has enhanced your COBRA Online Portal to offer you with added ability to setup the information for us to process your COBRA Open Enrollment for your COBRA participants and those within their election period. Please follow these steps to set up your Open Enrollment packets.

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

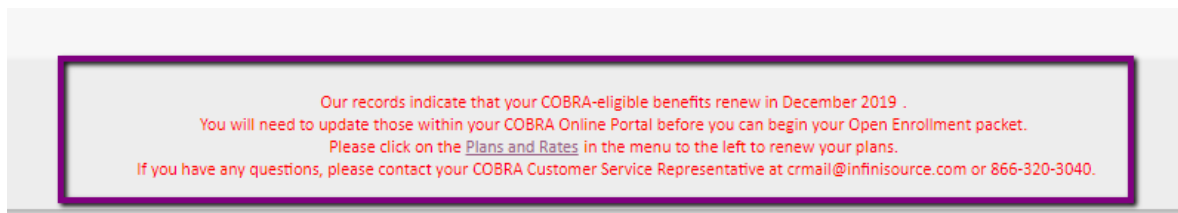
Click on “Start New Packet” to begin the Open Enrollment process.



Account

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

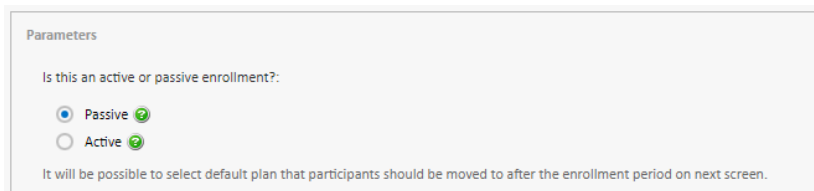
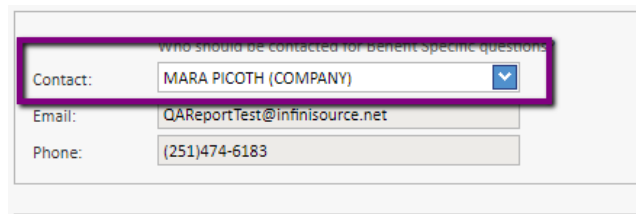
If your plans/rates have not been updated, you will be prompted to updates these prior to completing the Open Enrollment packets.



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](#).



Type of Open Enrollment

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

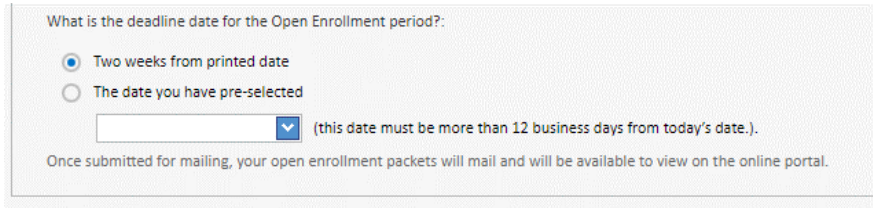
Definitions of the two options:

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*

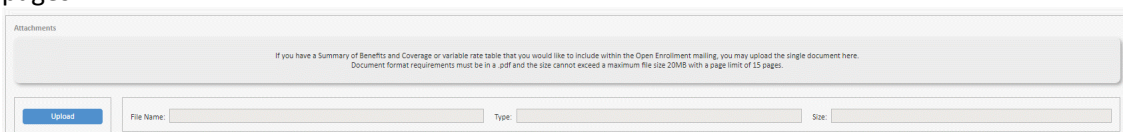
Due Date

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.

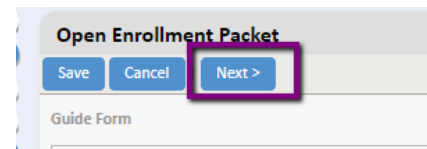
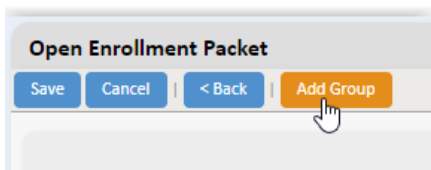


Attachments

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 15 pages.



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

Add Group

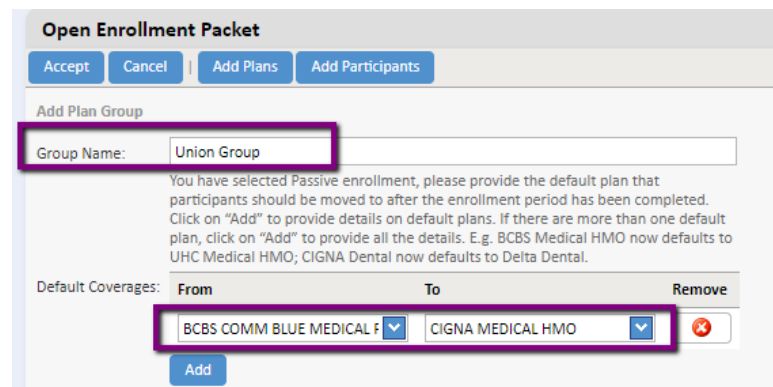
Click on “Add Group”.

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.

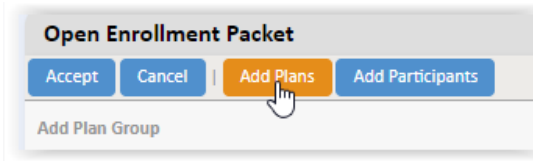
Select the plans and the participants to receive the mailing and submit, then repeat and process for your next subset.

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.



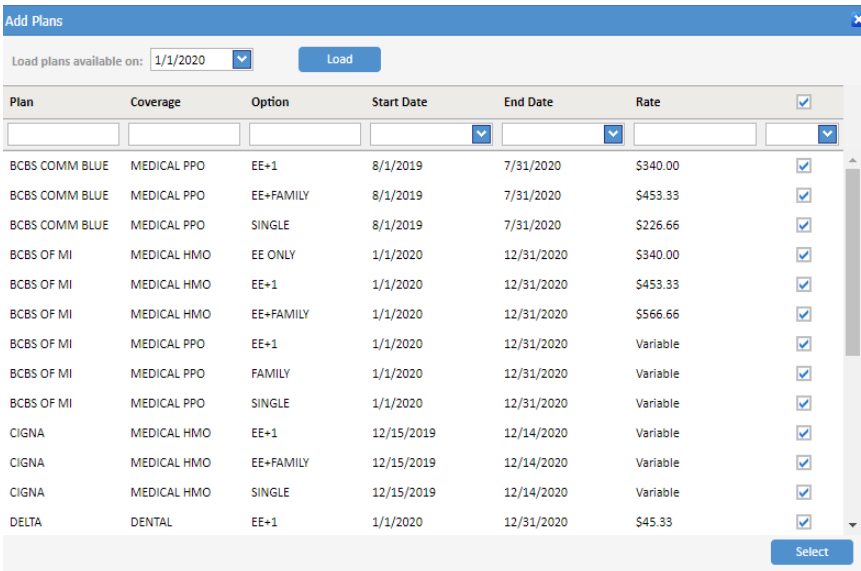
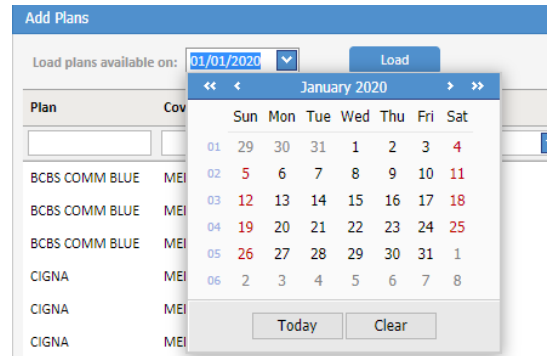
Add Plans



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”.

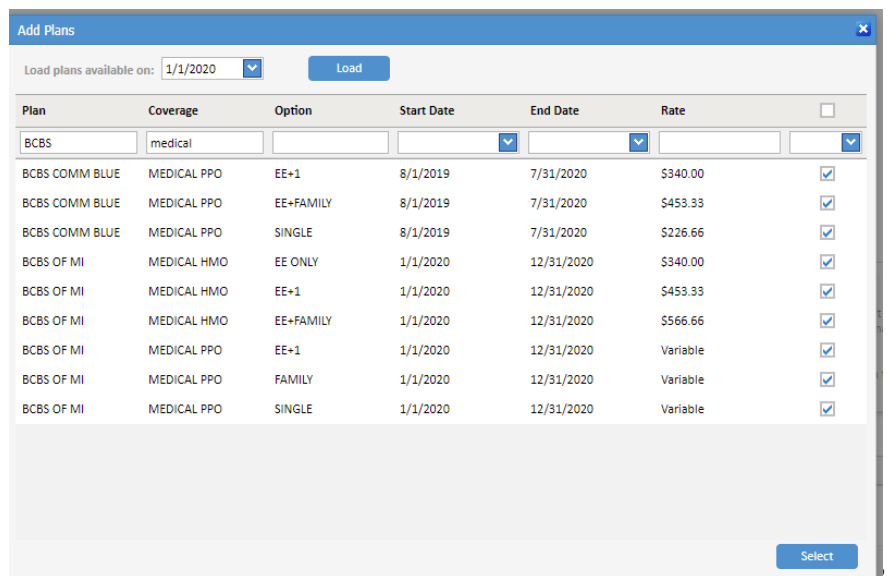
Select the beginning of the plan year for the plans to show in the packet, e.g. 1/1/2020 and then click on “Load”.



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”.

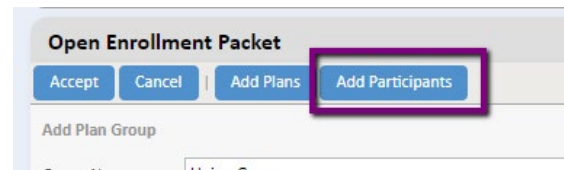


Plan	Coverage	Option	Start Date	End Date	Rate	Remove
BCBS COMM BLUE	MEDICAL PPO	EE+1	8/1/2019	7/31/2020	\$340.00	
BCBS COMM BLUE	MEDICAL PPO	EE+FAMILY	8/1/2019	7/31/2020	\$453.33	
BCBS COMM BLUE	MEDICAL PPO	SINGLE	8/1/2019	7/31/2020	\$226.66	
BCBS OF MI	MEDICAL HMO	EE ONLY	1/1/2020	12/31/2020	\$340.00	
BCBS OF MI	MEDICAL HMO	EE+1	1/1/2020	12/31/2020	\$453.33	
BCBS OF MI	MEDICAL HMO	EE+FAMILY	1/1/2020	12/31/2020	\$566.66	
BCBS OF MI	MEDICAL PPO	EE+1	1/1/2020	12/31/2020	Variable	

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.

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.



Name	Type	Age	Gender	State	<input type="checkbox"/>
CZERNY, SLAVKO	Electee	32	MALE	CA	<input checked="" type="checkbox"/>
INDO, MAX	Electee	20	MALE	ME	<input checked="" type="checkbox"/>
KHATCHATURIAN, BEATRIZ	Electee	24	MALE	IL	<input checked="" type="checkbox"/>
RAGH, WILLIAM	Electee	60	FEMALE	KY	<input checked="" type="checkbox"/>
TEST16, TEST16	Electee	30		AR	<input checked="" type="checkbox"/>

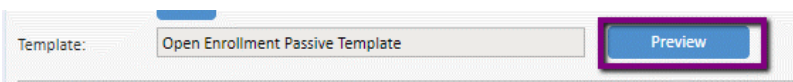
Once you have your selections complete, click on “Select”.

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.

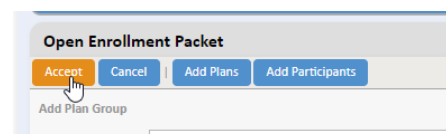
Once you have your selection, if you need to “remove” any click on the red “X” to remove them from the plans to offer on the Open Enrollment packet.

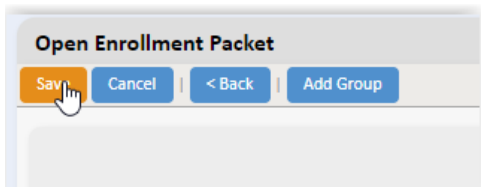
Name	Type	Age	Gender	State	Remove
CZERNY, SLAVKO	Electee	32	MALE	CA	
INDO, MAX	Electee	20	MALE	ME	
KHATCHATURIAN, BEATRIZ	Electee	24	MALE	IL	
RAGH, WILLIAM	Electee	60	FEMALE	KY	
TEST16, TEST16	Electee	30		AR	

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



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

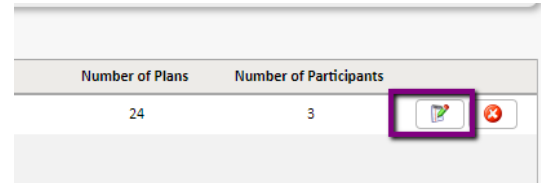




Save Groups

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				
Company	Started On	Requested By	# of Participants	Group Names
986472	8/16/2019	Hanshaw, Juli	5	Non Union, Union Group

Open Enrollment Packets Submission to Infinisource

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

Generated On	Printed On	Status	Submit for Printing	Edit/Remove/View
8/16/2019		Started	Submit	[Edit/Remove/View icons]
8/13/2019	8/13/2019	Generated		[Edit/Remove/View icons]
		Printed		[Edit/Remove/View icons]

To complete the process, click on “Submit” for the information to be uploaded to Infinisource.

When Infinisource 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 Infinisource, but you have started the process in the Online Portal.

Generated - Packets sent to Infinisource for processing/printing/mailing.

Printed - Packets that have been printed by Infinisource 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 crmail@infinisource.com.