

## Export/Import Plan & Rate Data to COBRA Online Portal:

Your online renewal option offers real time submission of rate changes to Infinisource with just a few clicks of the mouse, similar to submitting Qualifying Event and New Enrollee forms. Conceivably, you could submit rate changes to Infinisource and complete a Qualifying Event Form containing the updated rate information within moments, eliminating the wait time for manual plan and rate updates. Additionally, a confirmation report is available immediately upon submission of the updated rates.

The Infinisource COBRA Portal allows our customer to export a spreadsheet with their current plan and rate data and then update that to renew or end plans.

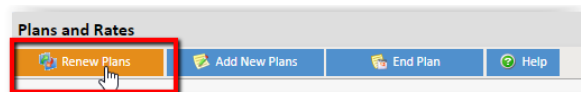
### Renew a Plan

Administration fee for COBRA is 2%. Administration fee for State Continuation is dependent on the specific states or federal regulation/guidance. You must select “Same Rate” (for plans that the rates will remain the same) or “New Rate” (and enter the new rates, without the administration fee) before submitting to Infinisource. Please review all of the information below prior to clicking on submit.

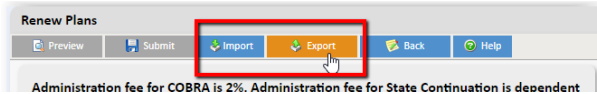
**When submitting rates through the online portal. Do not add the administration fee. We will add the appropriate fee based upon the set up of your account.**

Before clicking submit, please make certain that the information being provided is final and correct, as incorrect rates affect your participant’s election notices, invoices and may appear confusing on the website when you provide qualifying event data. Once you submit your data to Infinisource, these updates have been saved in real time to our database.

The first step is to click on “Renew” within the Plan and Rate area within your portal.



Then click on “Export” to pull a spreadsheet with your plans.



You will then have a spreadsheet of your Plans and Rates to update. Please review the below steps to complete the export/import for your plans and rates:

<b>Export/Import Plan and Rate Spreadsheet – Renew Premiums</b>			
<b>Field Name</b>	<b>Required?</b>	<b>Reference Column</b>	<b>Description</b>
Plan	Yes <b>DO NOT CHANGE THE CELLS IN THIS COLUMN</b>	A	<b>DO NOT CHANGE THE CELLS IN THIS COLUMN</b> This is the Provider Name we have in our system. Do not change this column.
Coverage	Yes <b>DO NOT CHANGE THE CELLS IN THIS COLUMN</b>	B	<b>DO NOT CHANGE THE CELLS IN THIS COLUMN</b> This is the Plan Name we have in our system. Do not change this column.
Option	Yes <b>DO NOT CHANGE THE CELLS IN THIS COLUMN</b>	C	<b>DO NOT CHANGE THE CELLS IN THIS COLUMN</b> These are the tiers that we have in our system. Do not change this column.

# How to Export/Import Plans/Rates via Online Portal

Start Date	Yes	D	First day of your plan year. Please update to your next plan year start date. (e.g. 1/1/2020)
End Date	Yes	E	Last day of your plan year. Please update to your next plan year end date. (e.g. 12/31/2020)
Same Rate	Yes 1 or 0	F	This will either be a 1 or a 0. If the rate is the same – no change to report – list 1 in this column. If the rate is changing and you will be inserting new premiums in Column I, then this will be a 0. It must be either a 1 or a 0. If you put a 1 in Column F for this plan, then Column G will need to be a 0.
New Rate	Yes 1 or 0	G	This will either be a 1 or a 0. If you are reporting a new rate – list 1 in this column. If you marked Column F as 1 (same rate) then you will need to mark this column with 0 (same rate) It must be either a 1 or a 0. If you put a 0 in Column F for this plan, then Column G will need to be a 1.
User Provide Rate (Variable Rate) *	Yes 1 or 0	H	See note below on explanation for Variable Rates. If you are reporting variable rates for this plan, you will mark this column with a 1. If you are providing the rates in Column I, this column will be a 0.
Premium	Yes Leave as the premium listed or update to new premium	I	This column is for you to enter your premiums for the plans on the spreadsheet ( <b>without the admin. fee added</b> ). If you have marked column H as a 1, then you would not need to make any change (leave the \$1.00 in the cell). If you have marked column F with a 1 (same rate), you do not need to make any changes to the premium. If you have marked column F as 0, column G as 1 – then you will be entering the new premium for each of the plans/tiers listed in the spreadsheet.

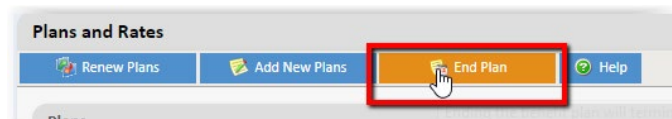
*\*Variable Rate = If you offer a coverage that the premium rate is variable, (example, your coverages are based upon age/gender or you offer a Health FSA), where the premium is different for each participant. Infinisource marks this coverage as variable and we will enter a monthly premium of \$1.00 for all the tiers/coverage levels. When submitting a Qualifying Event, you will be prompted to enter the correct monthly premium applicable to the participant, including the administration fee. You are responsible for informing Infinisource when the premiums for a participant requires an update on plans with variable rates.*

Once you have completed the spreadsheet, import this through the COBRA Online Portal. Click on “Renew” and “Import”. You will be provided with a final review of what you entered on the spreadsheet within the portal prior to submitting to Infinisource.

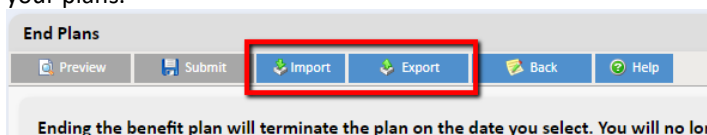
## End a Plan

Ending the benefit plan will terminate the plan on the date you select. You will no longer see this plan available as an option to select after the end date of the plan. Any COBRA participants that are enrolled in a plan you are ending will need to be moved to an active COBRA plan or coverage will terminate.

The first step is to click on “End Plan” within the Plan and Rate area within your portal.



Then click on “Export” to pull a spreadsheet with your plans.



# How to Export/Import Plans/Rates via Online Portal

Please review the below steps to complete this spreadsheet:

<b>Export/Import Plan and Rate Spreadsheet – End Plans</b>			
<b>Field Name</b>	<b>Required?</b>	<b>Reference Column</b>	<b>Description</b>
Plan	Yes* <b>DO NOT CHANGE THE CELLS IN THIS COLUMN</b>	A	<b>DO NOT CHANGE THE CELLS IN THIS COLUMN</b> This is the Provider Name we have in our system. Do not change this column.
Coverage	Yes* <b>DO NOT CHANGE THE CELLS IN THIS COLUMN</b>	B	<b>DO NOT CHANGE THE CELLS IN THIS COLUMN</b> This is the Plan Name we have in our system. Do not change this column.
End Date	Yes*	C	This is the date you would like to end your plans. The date listed in the column is the current plan year end date. This maybe the same date that you will be ending the plan.

*\*Note: Prior to importing to Infinisource, remove any plans from the spreadsheet that you will be renewing with the same rate or a new rate. The only plans on the spreadsheet prior to importing should be plan(s) that you are ending.*

You will review this data before submitting to Infinisource.