COBRA EMPLOYER PORTAL

QuickStart Guide

CPI

Welcome to CPI's **COBRA Employer Portal!** This one-stop portal gives you the tools you need to better support your members in the management of their COBRA & Direct Bill plans.

The COBRA Employer Portal is convenient and easy to use. Any-time access to the portal allows you to:

- Add members and member events
- View real-time individual participant account summary, plans, and payments
- View current and prior year plan information
- Run & Retrieve reports
- Access member information and communication history

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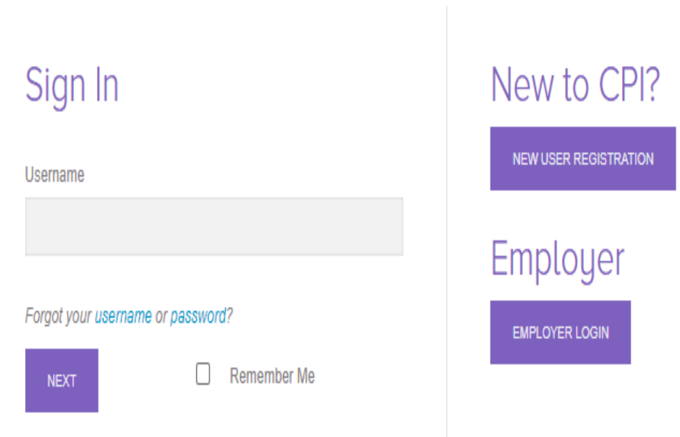
HOW DO I GET ACCESS TO THIS PORTAL?

1. You will be sent a New Client Login notice containing a registration code.
2. Navigate to https://cobra.mycpiteam.com/ and select New User Registration.
3. When going through **New User Registration**, you will be prompted to enter your **registration code** and **company EIN**, and then set up a password.
4. Once a password is created and confirmed, you will be automatically directed to your Home page.
5. **For any subsequent logins**, select Employer login ,you will enter your username on the main login page and then enter your password on a secondary login page.



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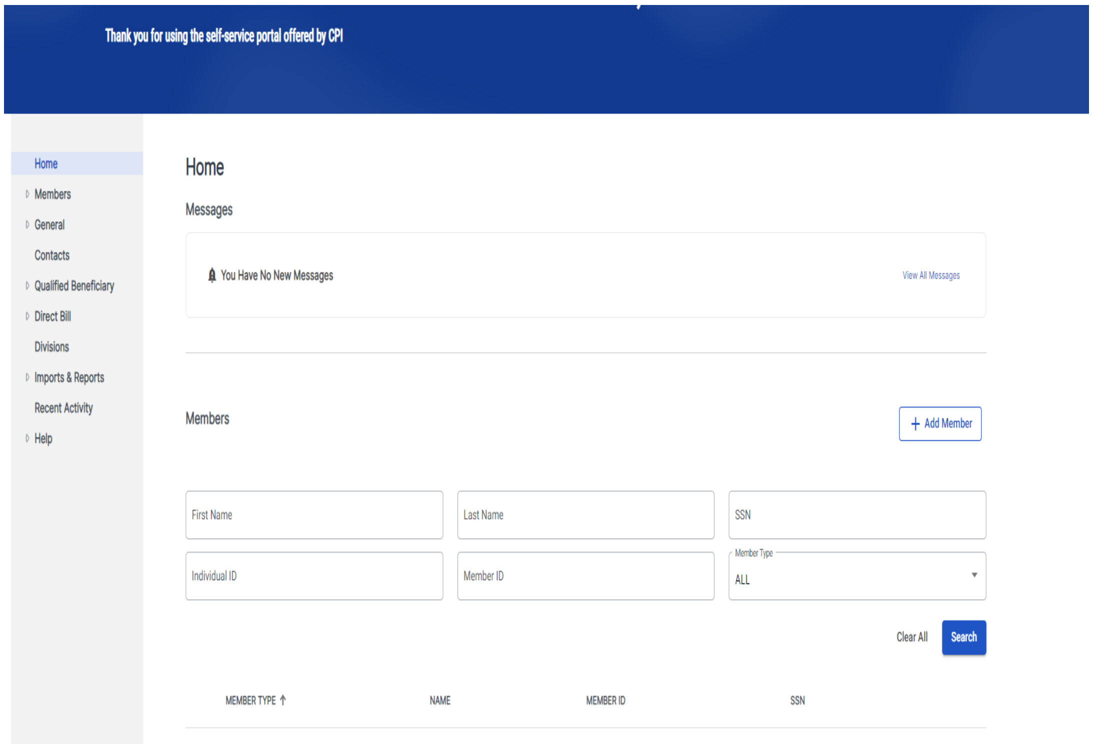
The **Home** page is easy to navigate:

Once you're logged in, everything you need to efficiently and effectively manage your COBRA accounts is found on the Home page. From the Home page, you can:

- Search for a member using first and last name, SSN or Member ID
- Add a new member
- View member-level data
- Check the status of file imports
- Import files
- View communications

The options within the left navigation Main Menu will direct you to any action you need to take.



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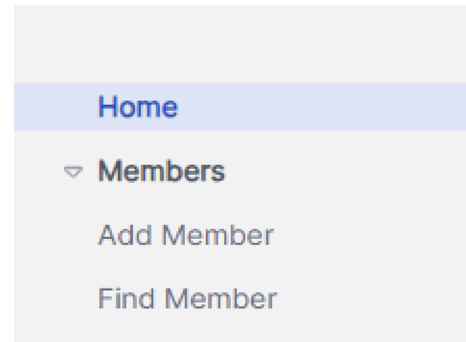
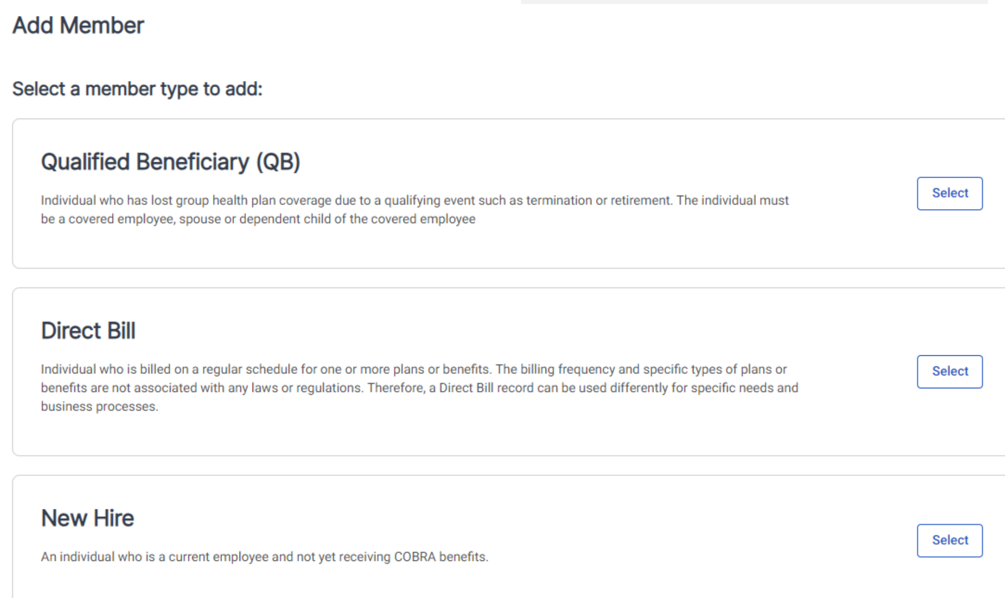
HOW DO I ADD NEW MEMBERS?

1. You can add a new member using the **Add Member** option available on the Home page or from the **Members** menu option.
2. Select the member type you'd like to add: *Qualified Beneficiary, Direct Bill, or New Hire.*
3. Click the **Next** button for the member type to begin the process of adding the new member.
4. Complete the required fields, marked with a red asterisk, and click **Next**.
5. Click **Save and Continue** to add new member information until you have completed all required steps.

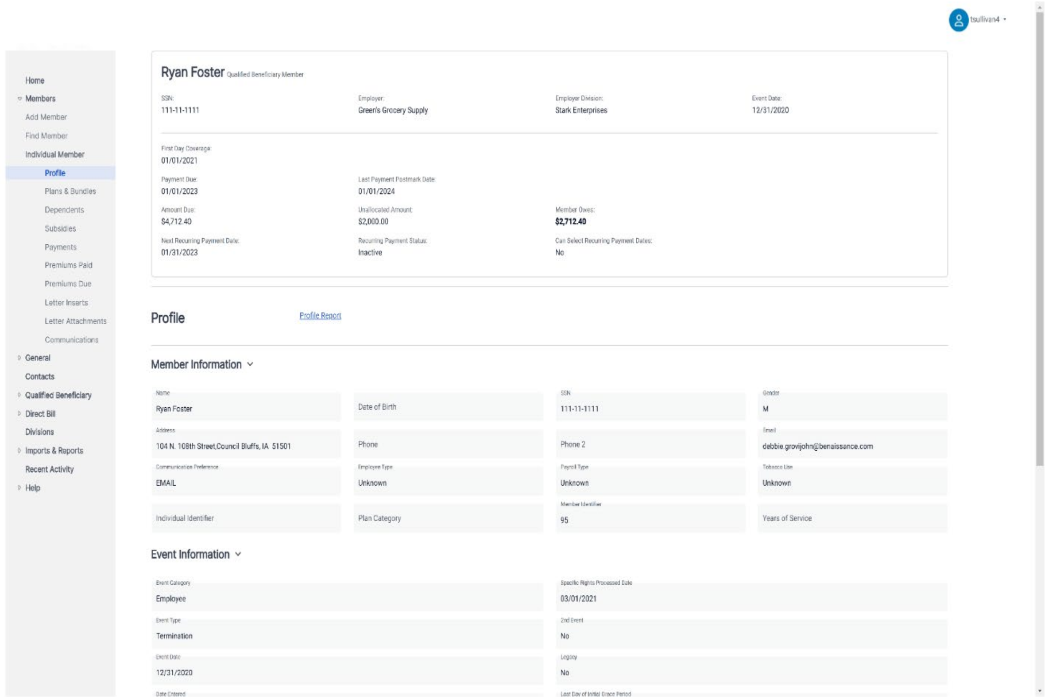
   The appropriate notification letter will be generated by the system and will automatically be sent to your administrator for printing and mailing.





WHAT KIND OF MEMBER-LEVEL DATA CAN I ACCESS?

1. You can locate the members record using the Members option available on the Home page or from the Members>Find Member on the menu option
2. You can search for members using first name, last name, SSN, Individual ID, Member ID, as well as Member Type.
3. Once in the member view, you can access the following information:
    - Profile/Demographics
    - Event information
    - Plans Enrollments
    - Payments
    - Member Communications
    - Letter attachments



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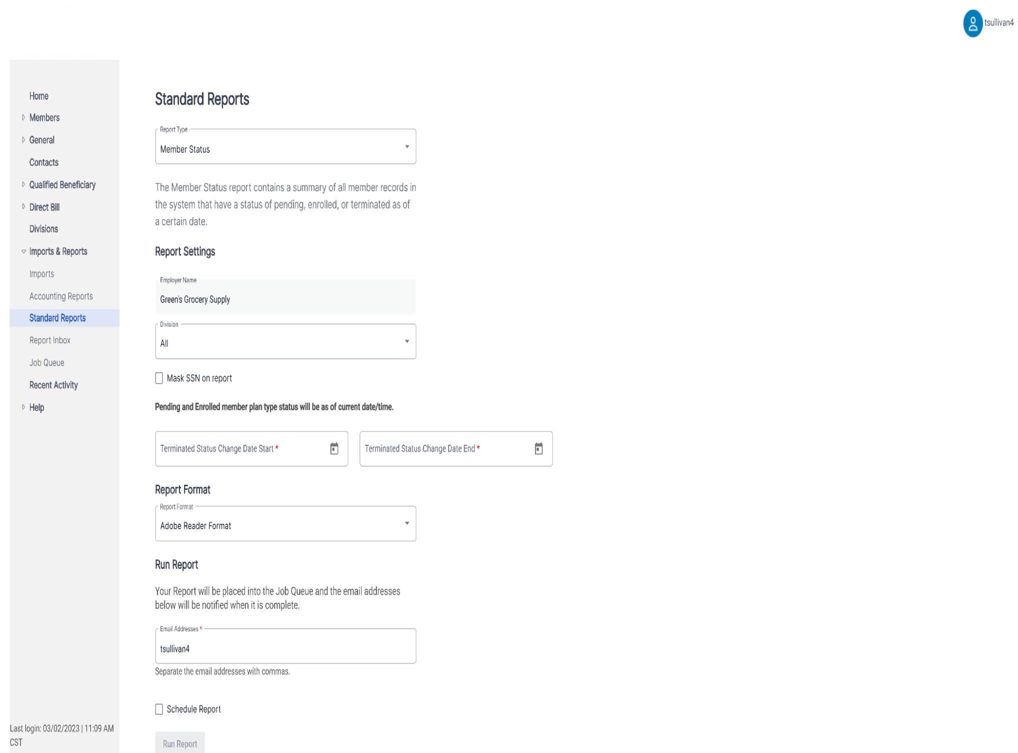
HOW DO I VIEW AND REQUEST REPORTS?

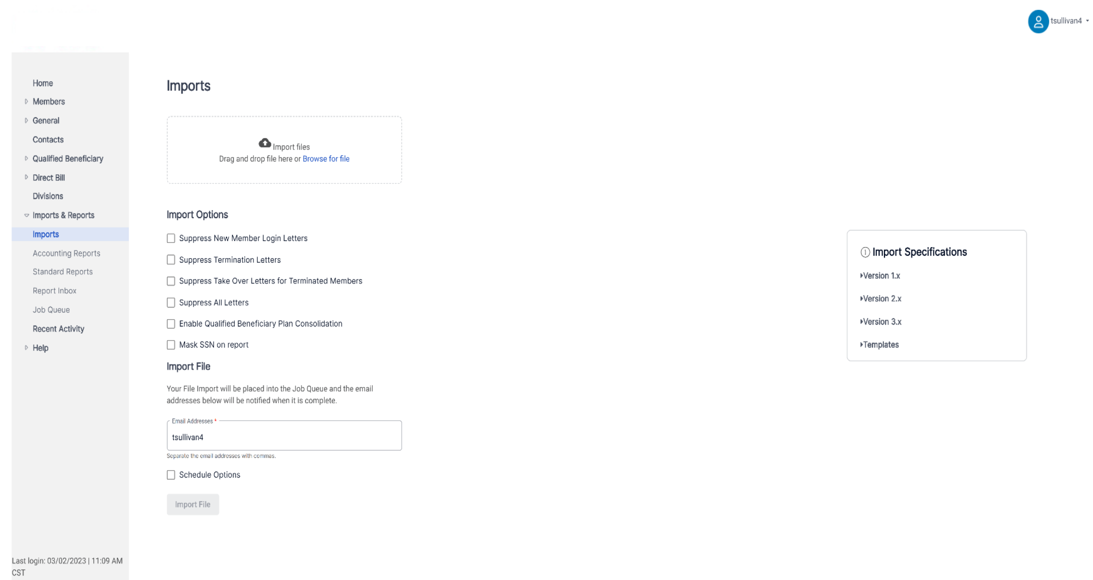
1. Select the **Imports & Reports** option to expand it and show the **Accounting Reports** and **Standard Reports** option.
2. After selecting either report option, you will be provided with a drop-down menu to choose which report you would like to generate.
3. Complete the required fields, marked with a red asterisk, and click the **Run Report** button.
4. The report will generate and be available in the **Job Queue**.
5. At the bottom of the page for the chosen report, you are also able to schedule a report for a given date and time, as well as allow the report to generate continuously on a schedule.



ONE OF THE FEATURES OF THE PORTAL IS THE ABILITY TO IMPORT DATA.

HOW DOES THAT WORK?

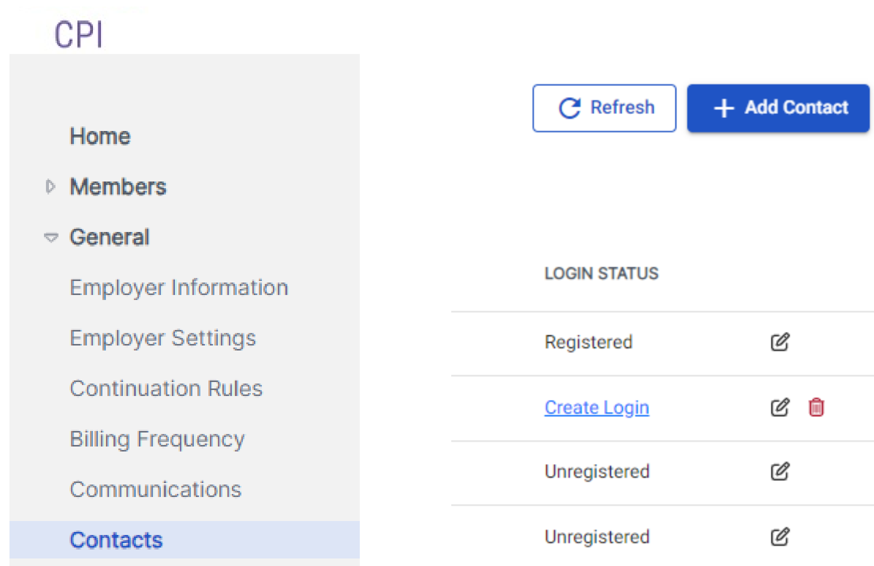
1. Select the **Imports & Reports** option to expand it and show the **Imports** option.
2. After selecting the **Imports** option, you can import demographic, dependent, event, and plan information into the portal using standard import specification template.
3. **Import Specifications**, used in the creation of your import file, are available on the Imports page.
4. Results will be available in the **Job Queue**.



HOW DO I VIEW CONTACTS LISTED ?

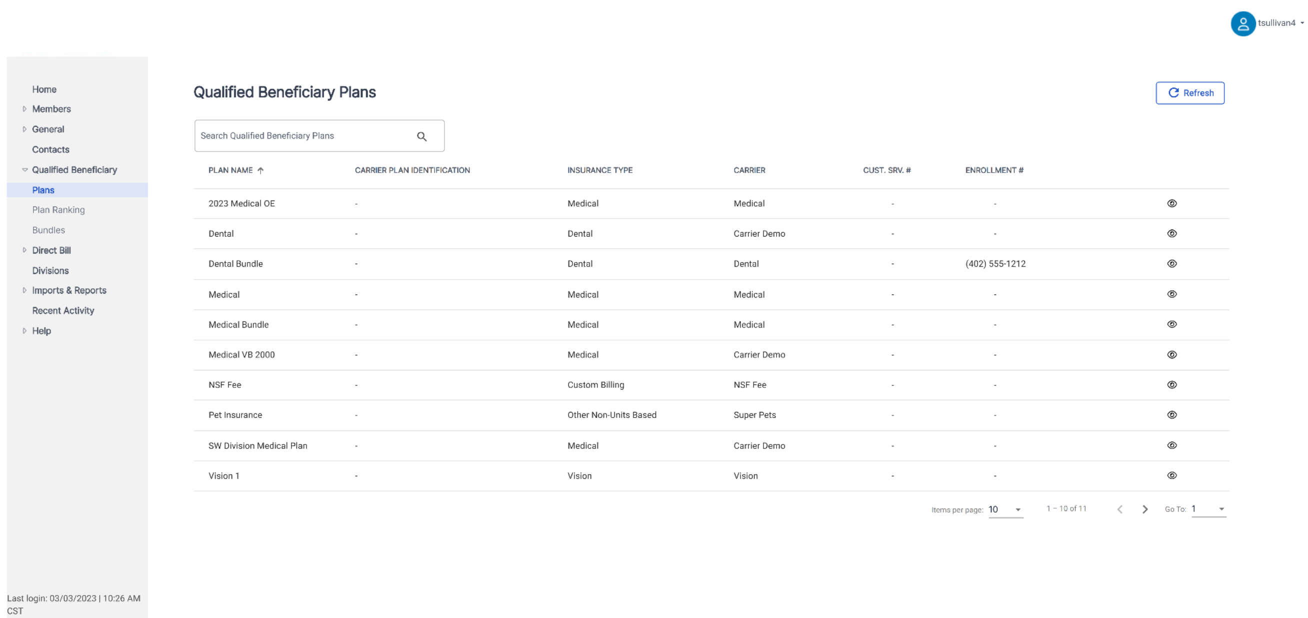
Select the **General** option to expand it and show the Contacts option.

From the Contacts page you can view and add contacts . In addition, once you've located a contact you are able to edit email address, delete or select contact as Inactive



WILL I BE ABLE TO ACCESS ANY OF MY PLAN INFORMATION?

1. Select either **Qualified Beneficiary or Direct Bill** on the menu options to expand the field. Then select under each plan type the Plans
2. Information available includes:
    - **Carrier Information**
    - **Rates**
    - **Plan Settings**



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How do I Add a Subsidy Schedule ?

- Select **Members** option to expand and search member
- **Subsidies** , under selected member's profile
- **Medical , Dental and Vision** ,must be added individually
- Add Subsidy Schedule