

QuickStart Guide



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.mycpitem.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.

Sign In

Username

[Forgot your username or password?](#)

NEXT

Remember Me

New to CPI?

NEW USER REGISTRATION

Employer

EMPLOYER LOGIN

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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.

Thank you for using the self-service portal offered by CPI

Home

Messages

You Have No New Messages [View All Messages](#)

Members [+ Add Member](#)

First Name Last Name SSN

Individual ID Member ID Member Type ALL

[Clear All](#) [Search](#)

MEMBER TYPE ↑ NAME MEMBER ID SSN

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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.

+ Add Member

Home

▼ Members

Add Member

Find Member

Add Member

Select a member type to add:

Qualified Beneficiary (QB)

Individual who has lost group health plan coverage due to a qualifying event such as termination or retirement. The individual must be a covered employee, spouse or dependent child of the covered employee

Select

Direct Bill

Individual who is billed on a regular schedule for one or more plans or benefits. The billing frequency and specific types of plans or benefits are not associated with any laws or regulations. Therefore, a Direct Bill record can be used differently for specific needs and business processes.

Select

New Hire

An individual who is a current employee and not yet receiving COBRA benefits.

Select

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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

The screenshot displays the member profile for Ryan Foster, a Qualified Beneficiary Member. The interface includes a navigation menu on the left and a main content area with the following details:

Ryan Foster <small>Qualified Beneficiary Member</small>			
SSN: 111-11-1111	Employer: Green's Grocery Supply	Employer Class: Stark Enterprises	Event Date: 12/31/2020
First Day Coverage: 01/01/2021	Payment Due: 01/01/2023	Last Payment Postmark Date: 01/01/2024	Member ID: \$2,712.40
Account Due: \$4,712.40	Unallocated Amount: \$2,000.00	Recruiting Payment Status: Inactive	Can Select Recurring Payment Dates: No
Next Recurring Payment Due: 01/31/2023			

Profile [Profile Book](#)

Member Information

Name: Ryan Foster	Date of Birth:	SSN: 111-11-1111	Gender: M
Address: 104 N. 168th Street/Council Bluffs, IA, 51501	Phone:	Phone 2:	Email: cecilia.grover@benaisance.com
Communication Preference: EMAIL	Employer Type: Unknown	Payroll Type: Unknown	Idcard Use: Unknown
Individual Identifier:	Plan Category:	Member Level: 95	Years of Service:

Event Information

Event Category: Employee	Specific Rights Processed Date: 03/01/2021
Event Type: Termination	Event: No
Event Date: 12/31/2020	Logins: No
Date Entered:	Last Day of Initial Open Period:

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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.

Home

- Members
- General
- Contacts
- Qualified Beneficiary
- Direct Bill
- Divisions
- Imports & Reports
 - Imports
 - Accounting Reports
 - Standard Reports**
 - Report Inbox
 - Job Queue
 - Recent Activity
 - Help

Standard Reports

Report Type
Member Status

The Member Status report contains a summary of all member records in the system that have a status of pending, enrolled, or terminated as of a certain date.

Report Settings

Employee Name
Green's Grocery Supply

Onsite
All

Mask SSN on report

Pending and Enrolled member plan type status will be as of current date/time.

Terminated Status Change Date Start *

Terminated Status Change Date End *

Report Format

Report Format
Adobe Reader Format

Run Report

Your Report will be placed into the Job Queue and the email addresses below will be notified when it is complete.

Email Address *
tsullivan4

Separate the email addresses with commas.

Schedule Report

Run Report

Last login: 03/02/2023 11:09 AM CST

tsullivan4

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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**.

The screenshot displays the 'Imports' page in the COBRA Employer Portal. On the left is a sidebar menu with options: Home, Members, General, Contacts, Qualified Beneficiary, Direct Bill, Divisions, Imports & Reports (expanded), Imports (selected), Accounting Reports, Standard Reports, Report Inbox, Job Queue, Recent Activity, and Help. The main content area is titled 'Imports' and features a dashed box for uploading an 'Import File' with the text 'Drag and drop file here or Browse for file'. Below this are 'Import Options' with checkboxes for: Suppress New Member Login Letters, Suppress Termination Letters, Suppress Take Over Letters for Terminated Members, Suppress All Letters, Enable Qualified Beneficiary Plan Consolidation, and Mask SSN on report. An 'Import File' section includes a text input for 'Email Address' (containing 'tsullivan4'), a note to 'Separate the email addresses with commas', a 'Schedule Options' checkbox, and an 'Import File' button. At the bottom left of the sidebar, it says 'Last login: 03/02/2023 | 11:09 AM CST'. On the right, a panel titled 'Import Specifications' lists 'Version 1.x', 'Version 2.x', 'Version 3.x', and 'Templates'.

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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

The screenshot displays the 'CPI' navigation menu on the left, with 'Contacts' highlighted. To the right, there are two buttons: 'Refresh' and '+ Add Contact'. Below these is a table titled 'LOGIN STATUS' with four rows. Each row shows a status and an edit icon. The second row includes a 'Create Login' link and a delete icon.

LOGIN STATUS	
Registered	
Create Login	
Unregistered	
Unregistered	

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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**

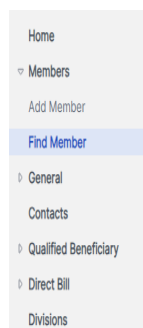
The screenshot displays the 'Qualified Beneficiary Plans' page in the COBRA Employer Portal. The sidebar menu on the left includes options like Home, Members, General, Contacts, Qualified Beneficiary, Plans, Plan Ranking, Bundles, Direct Bill, Divisions, Imports & Reports, Recent Activity, and Help. The 'Plans' option is currently selected. The main content area shows a table of plan information with columns for Plan Name, Carrier Plan Identification, Insurance Type, Carrier, Cust. SRV. #, and Enrollment #. A search bar is located above the table. The table lists various plans such as '2023 Medical OE', 'Dental', 'Dental Bundle', 'Medical', 'Medical Bundle', 'Medical VB 2000', 'NSF Fee', 'Pet Insurance', 'SW Division Medical Plan', and 'Vision 1'. The page also includes a 'Refresh' button and a footer with the text 'Last login: 03/03/2023 | 10:26 AM CST'.

PLAN NAME	CARRIER PLAN IDENTIFICATION	INSURANCE TYPE	CARRIER	CUST. SRV. #	ENROLLMENT #
2023 Medical OE	-	Medical	Medical	-	-
Dental	-	Dental	Carrier Demo	-	-
Dental Bundle	-	Dental	Dental	-	(402) 555-1212
Medical	-	Medical	Medical	-	-
Medical Bundle	-	Medical	Medical	-	-
Medical VB 2000	-	Medical	Carrier Demo	-	-
NSF Fee	-	Custom Billing	NSF Fee	-	-
Pet Insurance	-	Other Non-Units Based	Super Pets	-	-
SW Division Medical Plan	-	Medical	Carrier Demo	-	-
Vision 1	-	Vision	Vision	-	-

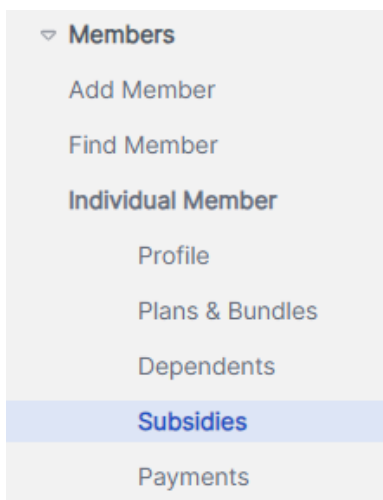
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How do I Add a Subsidy Schedule ?

- 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



Find Member

A search form with the following fields: First Name, Last Name, SSN, Individual ID, Member ID, and Member Type (a dropdown menu with 'ALL' selected). There are 'Clear All' and 'Search' buttons at the bottom right.

Add Subsidy Schedule

Schedule Information

A form for adding a subsidy schedule. It includes two date pickers: 'Subsidy Schedule Start' with the value '07/07/2023' and 'Subsidy Schedule End' with the value '07/07/2023'. Below these is a 'Subsidy Schedule Type' dropdown menu with 'Employer Subsidy' selected. A scrollable list of options is shown below the dropdown, including 'Medical' (highlighted), 'Dental', and 'Vision'.