

# CONTINUATION SERVICES EMPLOYER PORTAL QUICKSTART GUIDE



Welcome to 121 Benefits Continuation Services Employer Portal. This one-stop portal gives you the tools you need to better support your members in the management of their COBRA benefit plans.

The Continuation Services 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
- Retrieve reports generated by the employer
- Access communication history

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## HOW DO I GET ACCESS TO THIS PORTAL?

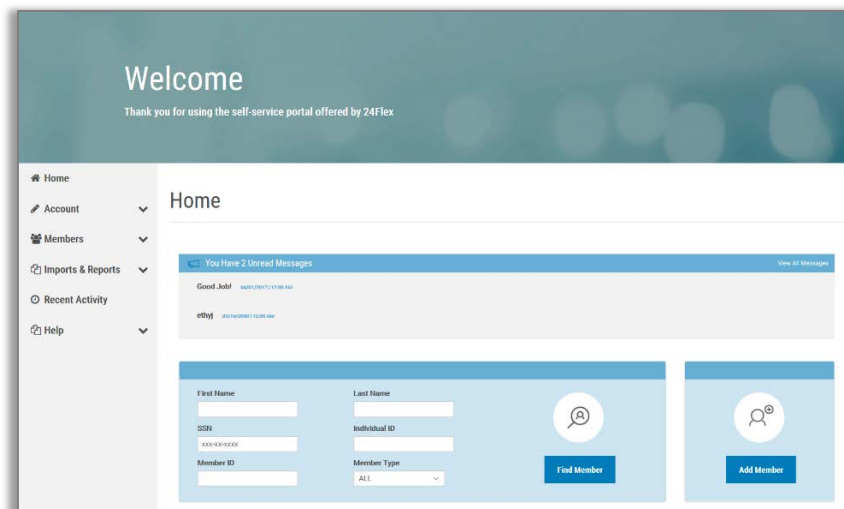
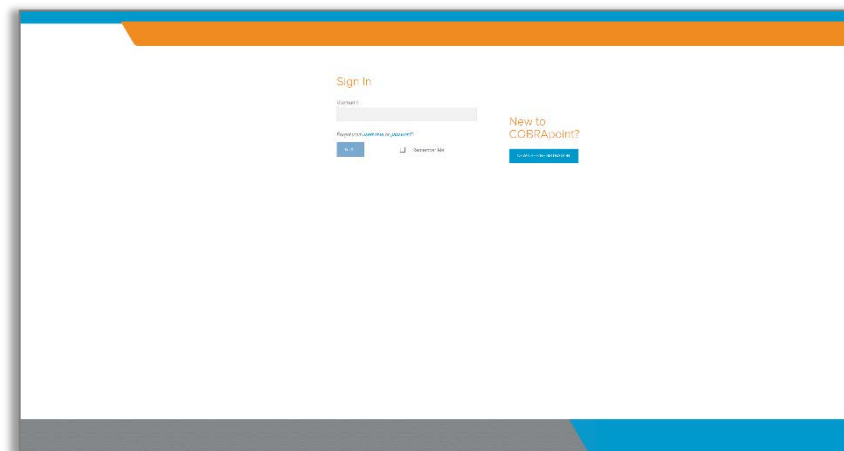
1. You will be sent a New Client Login notice containing a registration code.
2. Navigate to [cobrapoint.benaissance.com](http://cobrapoint.benaissance.com) and select **New User Registration**.
3. When going through New User Registration, you will be prompted to enter your registration code and company 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, you will enter your username on the main login page and then enter your password on a secondary login page.

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:

- Add a new member
- View member-level data
- Check the status of file imports
- View plan information
- 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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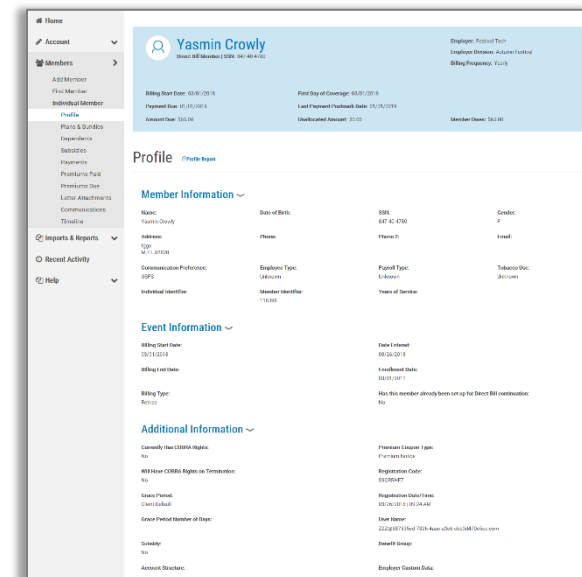
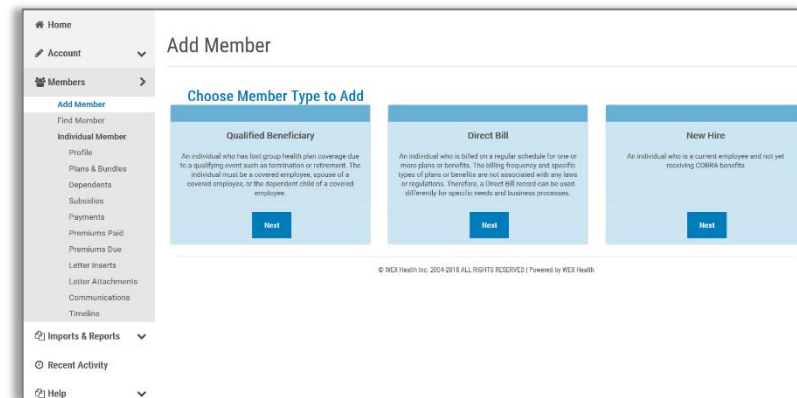
## HOW DO I ADD NEW MEMBERS?

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 a member's record using the **Find Member** option available on the Home page or from the **Members** 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:
  - Demographics
  - Event Information
  - Payments
  - Plan Enrollments
  - 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** options.
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**.

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.

The screenshot shows the 'Standard Reports' page. On the left is a navigation menu with options: Home, Account, Members, Imports & Reports (expanded), Accounting Reports, Standard Reports, Job Queue, Recent Activity, and Help. The main content area is titled 'Standard Reports' and includes a 'Choose Report Type' dropdown menu set to 'Carrier Notifications Pending'. Below this is a 'Report Settings' section with a dropdown for 'Employee Name: KFac' and a 'Database' dropdown set to 'All'. There are checkboxes for 'Mask SSI on report' and 'REPORT FORMAT' options: 'Alpha Reader Format' (selected), 'Comma Separated Values Text File', 'Microsoft Access Database File', and 'XML File'. A 'Run Report' button is present, with a note: 'Your Report will be placed into the Job Queue and the email addresses above will be notified when it is complete.' There is also a 'Schedule Options' link.

The screenshot shows the 'Imports' page. The navigation menu is similar to the previous page. The main content area is titled 'Imports' and includes a 'Select File & Import Options' section with a file upload field and a 'Select' button. Below this is an 'Import Options' section with several checkboxes: '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 SSI on report'. To the right of these options is a 'Import Specifications' panel with three buttons: 'Version 1.x', 'Version 2.x', and 'Version 3.x'. At the bottom, there is an 'Import File' button and a note: 'Your file import will be placed into the Job Queue and the email address above will be notified when it is complete.' There is also a 'Schedule Options' link.

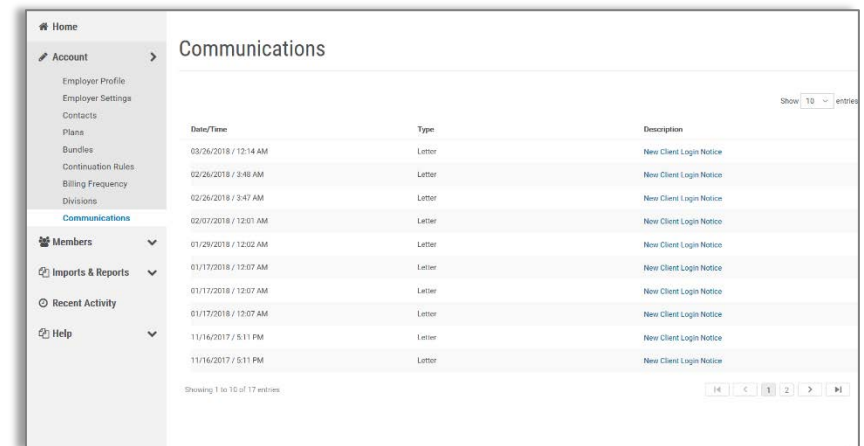
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## HOW DO I VIEW COMMUNICATIONS AND MESSAGES?

1. Select the **Account** option to expand it and show the **Communications** option.

From the Communications page you can view the communications provided specifically for you. In addition, selecting the **Communications** option once you've located a member and are in the member view, allows you to view the communications provided for the member.



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

1. Select the **Account** option to expand it and show the **Plans** and **Bundles** options.
2. Selecting either option will display the plans or bundles for Qualified Beneficiary and Direct Bill members.
3. Information available includes:
  - Carrier Information
  - Rates
  - Plan Settings

