



BOSS COBRA Review

- Properly Terminating an Employee in the BOSS
 - Terminating Benefit Coverage
 - Ensuring COBRA notices
- Enrolling COBRA members

BOSS COBRA Review

As the BOSS administrator, you will need to ensure that COBRA notices are sent to employees and their dependents in a timely fashion. Although the BOSS automatically sends a weekly file of QE (Qualifying Event) COBRA notices, you will need to activate this process. NOTE: New hire employees will automatically be sent a notice upon enrolling in benefits in the BOSS. There are three main steps that must be taken in order to achieve this. They are

1. Terminating employees in the BOSS.
2. Termination of Benefits
 - A. EDI Carriers – Automatically by EDI file.
 - B. Non-EDI Carriers -- Manual Notification.
3. BOSS – Infinisource COBRA Administration - Consistently reviewing and updating the COBRA Review section of the BOSS .
 - A. COBRA Review Report
 - B. Approval of COBRA Notice

Terminating Employees in the BOSS

The screenshot shows the FirstWest HR system interface. At the top, there is a navigation bar with tabs for HOME, ADMIN, CLIENT ADMIN, NEWS, LIBRARY, and ROLE. Below this is a sub-navigation bar with links for User Admin, Benefit Admin, Time Off Admin, Company Admin, Reports, Enrollment, and Import. The main content area displays the profile for Lee A Bartholomew, with tabs for Demographics, Employment, Compensation, Benefits, and Banking & Taxes. The Demographics tab is active, showing fields for First Name (Lee), Middle Initial (A), Last Name (Bartholomew), Social Security Number (225-92-6549), Date of Birth (4/6/1955), Age (53), Gender (Female), Disabled (No), Race/Ethnicity, Import User ID (1233), and Tester User. There are also sections for Login Information, Emergency Contact Information, and Address Information. In the left sidebar, the 'Terminate Employment' button is circled in red.

1. Go to User Admin, browse to and select employee. Click the “Terminate Employment” button.

The screenshot shows the 'Terminate Employment' form in the FirstWest HR system. The form title is 'Terminate Employment' and it includes the instruction: 'Terminate employment and end all benefits coverage for an employee and all of his/her dependents.' The form is for Lee Bartholomew and contains the following fields: 'Last Day Worked' (9/11/2008), 'Termination Date' (usually same as Last Day Worked), and 'Term Reason' (Other). The form is highlighted with a red box. Below the form are links for '<< Cancel' and '>> Continue', and a footer with links for 'Privacy Policy' and 'Browser Requirements'.

2. Enter Last Day Worked and Termination Date, usually the same date.
3. Please select a termination reason and click continue. Do not leave the termination reason as “Other” because that does not trigger a COBRA event.



HOME ADMIN CLIENT ADMIN NEWS LIBRARY ROLE

User Admin Benefit Admin Time Off Admin Company Admin Reports Enrollment Import

Utah Demo Tester
-TOP DOG

Terminate Employment

Terminate employment and end all benefits coverage for an employee and all of his/her dependents.

Lee Bartholomew

Last Day Worked: 9/11/2008
(mm/dd/yyyy)

Termination Date: 9/11/2008
(mm/dd/yyyy)

Term Reason: Termination

[Select All](#)

Terminate Plan Name	Last Day Covered
<input checked="" type="checkbox"/> Select:Med Plus HealthSave Family	9/30/2008
<input checked="" type="checkbox"/> Health Savings Account	9/30/2008
<input checked="" type="checkbox"/> Met Life Dental	9/30/2008
<input checked="" type="checkbox"/> Voluntary Life	9/30/2008
<input checked="" type="checkbox"/> Voluntary Spouse Life	9/30/2008
<input checked="" type="checkbox"/> Voluntary Child Life	9/30/2008
<input checked="" type="checkbox"/> Basic Life and AD&D Admin	9/11/2008
<input checked="" type="checkbox"/> Hartford Life-Long Term Disability	9/30/2008
<input checked="" type="checkbox"/> 401 (k)	9/11/2008
<input checked="" type="checkbox"/> FSA Limited Medical 2008	9/30/2008

<< Cancel | Continue >>

[Privacy Policy](#) | [Browser Requirements](#)

- Verify termination dates for employee's benefits. This is usually the last day of the month in which the employee was terminated. If the date is wrong, please enter the correct date.
- Click Continue.



HOME ADMIN CLIENT ADMIN NEWS LIBRARY ROLE

User Admin Benefit Admin Time Off Admin Company Admin Reports Enrollment Import

Utah Demo Tester
-TOP DOG

Terminate Employment

Terminate employment and end all benefits coverage for an employee and all of his/her dependents.

Lee Bartholomew

Employee was terminated successfully.

Click [here](#) to continue.

[Privacy Policy](#) | [Browser Requirements](#)

- You will receive verification on the following screen that the employee was successfully terminated.
- Select the "Here" button to return to the View/Edit page.



HOME ADMIN CLIENT ADMIN NEWS LIBRARY ROLE

User Admin Benefit Admin Time Off Admin Company Admin Reports Enrollment Import

Utah Demo Tester
-TOP DOG

Add User

View / Edit

Life Event History

Employee File

Tracker

Time Off

Family Information

Beneficiaries

Resums

Roles

Company Assets

Impersonate User

Benefit Coverages

Special Enrollment

Workflows

Assign To Client

Terminate Employment
Activate COBRA
Re-Hire Employee
Delete Employee

Demographics Employment Compensation Benefits Banking & Taxes

Lee A Bartholomew

Employment Information	Edit	Location Information	
Employee ID	1047	Effective Date	8/8/2008
Hire Date	3/1/2008	Location	Provo
Years Of Service	0		
Original Hire Date	3/8/2008		
Employment Status	Not Active		
Employment Status Effective Date	3/1/2008		
Time Status	Full Time Hourly		
Pay Frequency	Semi-Monthly (24 per year)		
Overtime	Standard OT (Non-Exempt)		
HCE Flag	No		
EEO Class			
Job Title			
Job Title Effective Date			
Supervisor Code	No		
Supervisor			

Department Information	
Effective Date	
Department	
Department Percent	
Department 2	
Department 2 Percent	

Division Information	
Effective Date	8/28/2008
Division	Full

- Click on the "Employment" tab along the top. The Employment Status now shows "Not Active". Do not change the Employment Status or Benefit Class to COBRA until the employee has actually enrolled in COBRA. Infinisource will send you a notice when the employee has enrolled.

Ensuring COBRA notices are sent in a timely fashion

The screenshot shows the FirsWest web application interface. At the top, there is a navigation bar with tabs for HOME, ADMIN, CLIENT ADMIN, NEWS, LIBRARY, and ROLE. Below this is a 'Preferences' section. The main content area is titled 'Welcome Betty Sego' and includes a 'CONTACT US' button. The dashboard is divided into several sections: 'What's New' with a list of 'Bulletin to Management' items; 'COMPANY LIBRARY' with links to Employee Directory, Common Questions, Glossary, Documents and Links, and Benefit Summaries; 'TOOLS' with links for Send emails, Submit a Ticket, Tracker, and Reports; 'ADMIN' with links for Client Admin, Company Admin, Vendors and Carriers, User Admin, Add New User, News Admin, Content Admin, Benefit Admin, Time Off Admin, and Questions Admin; 'Search' with a search area and a 'GO' button; and 'Roles' with a 'Select Client' dropdown and a 'Select Role' dropdown, both with 'GO' buttons. A red circle highlights the 'VIEW ALERTS' button in the 'What's New' section. At the bottom, there are links for 'Privacy Policy' and 'Browser Requirements'.

9. Click the “View Alerts” button. Please check your “View Alerts” whenever you terminate and employee’s benefits to make sure that the COBRA notice is sent in a timely manner.

The screenshot shows the 'Alerts' page in the FirsWest web application. The navigation bar and 'Preferences' section are the same as in the previous screenshot. The main content area is titled 'Alerts' and displays a list of alert categories with their respective item counts: 'Anniversaries - 2 Items', 'Birthdays (No Ages) - 1 Item', 'COBRA QE Review - 1 Item' (circled in red), 'Enrollment Changes - 4 Items', and 'Pending Time Off Awaiting Approval - 1 Item'. At the bottom left, there is a '<< Back to Home' link. At the bottom right, there are links for 'Privacy Policy' and 'Browser Requirements'.

10. Click on the COBRA QE Review link.



HOME ADMIN CLIENT ADMIN NEWS LIBRARY ROLE

User Admin Benefit Admin Time Off Admin Company Admin Reports Enrollment Import

Utah Demo Tester
-TOP DOG

Activity Reports
Admin Reports
Benefit Reports
Billing Reports
Billing Suite
Change Reports
COBRA QE Review
Config Reports
Custom Reports
Enrollment Reports
Offline Reports
Pending Reports
Time Off Reports
Vendor Interfaces
Forms

Newly Eligible Records to Be Sent Sent Records Non-Eligible Rejected

COBRA Qualifying Event Review

Order by: Employee Last Name Filter type: (No Filter)

Limit future dated records by: 180 days Limit past records by: 180 days

100 employees per page Page 1 of 1

Select All

Bartholomew, Lee Family

Bartholomew, Lee Location: Provo NonManager Benefit Class: Employee
SSN: 225-92-6549 Division: Full Time Regular
Employee ID: 1047 Department:

Benefit Type	Plan Name	Effective Dates	Event Reason
<input type="checkbox"/> Dental	Met Life Dental	4/1/2008 - 9/30/2008	Termination
<input type="checkbox"/> Health	Select:Med Plus HealthSave Family	4/1/2008 - 9/30/2008	Termination
<input type="checkbox"/> Flexible Spending	FSA Limited Medical 2008	4/1/2008 - 9/30/2008	Termination

Bartholomew, Frank SSN:

Benefit Type	Plan Name	Effective Dates	Event Reason
<input type="checkbox"/> Dental	Met Life Dental	4/1/2008 - 9/30/2008	Termination

Bartholomew, Marc Child
SSN:

Benefit Type	Plan Name	Effective Dates	Event Reason
<input type="checkbox"/> Health	Select:Med Plus HealthSave Family	4/1/2008 - 9/30/2008	Termination
<input type="checkbox"/> Dental	Met Life Dental	4/1/2008 - 9/30/2008	Termination

Callahan, Linda Family

Callahan, Linda Location: Provo Benefit Class: Employee
SSN: 225-06-5229 Division:
Employee ID: Department:

Not COBRA Eligible

Callahan, B Child
SSN:

Benefit Type	Plan Name	Effective Dates	Event Reason
<input type="checkbox"/> Dental	Met Life Dental	1/1/2006 - 11/30/2008	Overage or Ineligible Dependent

100 employees per page Page 1 of 1

Approve Mark as Sent Reject

[Privacy Policy](#) | [Browser Requirements](#)

11. Please verify that the information is correct and check the boxes by each member and plan.
12. Click the “Approve” button at the bottom of the page. If for any reason you have sent the information to Infinisource directly, click “Mark as Sent”.

Entering COBRA elections

Once you have received the notice from Infinisource that the employee has elected COBRA, please do the following:



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Utah Demo Tester -TOP DOG

Add User

View / Edit

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Resumé

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Impersonate User

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Special Enrollment

Workflows

Assign To Client

Terminate Employment

Activate COBRA

Re-Hire Employee

Deactivate Employee

Demographics Employment Compensation Benefits Banking & Taxes

Lee A Bartholomew

Employment Information	Edit	Location Information	
Employee ID	1047	Effective Date	8/8/2008
Hire Date	3/1/2008	Location	Provo
Years Of Service	0		
Original Hire Date	9/8/2003		
Employment Status	Not Active		
Employment Status Effective Date	3/1/2008		
Time Status	Full Time Hourly		
Pay Frequency	Semi-Monthly (24 per year)		
Overtime	Standard OT (Non-Exempt)		
HCE Flag	No		
EEO Class			
Job Title			
Job Title Effective Date			
Supervisor Code	No		
Supervisor			

Department Information	
Effective Date	
Department	
Department Percent	
Department 2	
Department 2 Percent	

Division Information	
Effective Date	8/28/2008
Division	Full

1. Go to User Admin, browse to and select employee. Click the “Activate COBRA” button.



HOME ADMIN CLIENT ADMIN NEWS LIBRARY ROLE

User Admin Benefit Admin Time Off Admin Company Admin Reports Enrollment Import

Utah Demo Tester -TOP DOG

Activate COBRA/Retirees

Activate cobra for an employee and/or dependents, or retirement for employees.

Lee Bartholomew

Last Day Worked: 9/11/2008

Last Day of Coverage:

Employment Status: COBRA

Benefit Class: COBRA (Select COBRA benefit class)

Employment Status and Benefit Class Effective Date: 10/1/2008 (mm/dd/yyyy)

Save Cancel

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2. Change “Benefit Class” to COBRA. Enter the “Effective Date”. Click “Save”.



HOME ADMIN CLIENT ADMIN NEWS LIBRARY ROLE

User Admin Benefit Admin Time Off Admin Company Admin Reports Enrollment Import

Utah Demo Tester
-TOP DOG

Activate COBRA/Retirees

Activate cobra for an employee and/or dependents, or retirement for employees.

Employee was activated for COBRA successfully.

Click [here](#) to setup COBRA benefits enrollment.

Lee Bartholomew
Last Day Worked: 9/11/2008
Last Day of Coverage:

Employment Status: COBRA

Benefit Class: COBRA (Select COBRA benefit class)

Employment Status and Benefit Class Effective Date: 10/1/2008 (mm/dd/yyyy)

Save Cancel

[Privacy Policy](#) | [Browser Requirements](#)

3. Click "here".

HOME ADMIN CLIENT ADMIN NEWS LIBRARY ROLE

User Admin Benefit Admin Time Off Admin Company Admin Reports Enrollment Import

Utah Demo Tester
-TOP DOG

- Add User
- View / Edit
- Life Event History
- Employee File
- Tracker
- Time Off
- Family Information
- Beneficiaries
- Resumé

Special Enrollment

Manage special enrollments for an employee.

► Add New

Special Enrollment History for Lee Bartholomew

Click [here](#) to go to Enrollment

Enrollment Period	Effective Date	Change Reason	Notes	Approval Required	Saved By
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4. Click “Add New”.

FirstWest
BENEFIT SOLUTIONS

HOME ADMIN CLIENT ADMIN NEWS LIBRARY ROLE

User Admin Benefit Admin Time Off Admin Company Admin Reports Enrollment Import

Utah Demo Tester
-TOP DOG

Add User
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Benefit Coverages
▶ **Special Enrollment**
Workflows
Assign To Client

Special Enrollment

Manage special enrollments for an employee.

▼ **Add New**

*Change Reason: COBRA Activation

*Enroll Start Date: November 19, 2008

*Enroll End Date: December 19, 2008

*Effective Date: October 1, 2008
(Any enrollment choices will be effective on this date.)

Notes:

Benefit Plan Types:

- Dental Health

(Hold down Ctrl key for multiple selections)

Pend enrollment until approval of HR Manager?

Save

5. Enter the reason as “COBRA Activation”. If you, the HR Manager will be entering the COBRA election, you can leave the “Enroll Start Date” and the “Enroll End Date” without change. If the employee will be entering the election, change the dates. Enter the “Effective Date”. Select the COBRA plans that they have elected.

6. Click “Save”.



HOME ADMIN CLIENT ADMIN NEWS LIBRARY ROLE

User Admin Benefit Admin Time Off Admin Company Admin Reports Enrollment Import

Utah Demo Tester -TOP DOG

- Add User
- View / Edit
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- Tracker
- Time Off
- Family Information
- Beneficiaries
- Resumé
- Roles

Special Enrollment

Manage special enrollments for an employee.

▶ Add New

Special Enrollment History for Lee Bartholomew

Click [here](#) to go to Enrollment

Enrollment Period	Effective Date	Change Reason	Notes	Approval Required	Saved By
11/19/2008 - 12/19/2008	10/1/2008	COBRA Activation		Employee	Betty Segó

Health; Dental;

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7. Click “here” to go to Enrollment.



HOME ADMIN CLIENT ADMIN NEWS LIBRARY ROLE

User Admin Benefit Admin Time Off Admin Company Admin Reports Enrollment Import

Utah Demo Tester -TOP DOG

- Search User
- Add User
- View / Edit
- Life Event History
- Employee File
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- Impersonate User
- Benefit Coverages
- ▶ **Enroll**
 - End Coverages
 - Edit Coverages
- Special Enrollment
- Workflows
- Assign To Client

Enroll

Lee Bartholomew

Special Enrollment

Benefits Effective as of: 10/1/2008

■ [Calculate Costs](#) ■ [Continue >>](#)

Benefit Type	Benefit Plan	Amount	Employee Cost Per Pay Period	Employer Cost Per Pay Period
Health	<input checked="" type="radio"/> Waive			
	<input type="radio"/> Select:Med Plus HealthSave Family	Plan Details >>	\$0.00	\$0.00
	<input type="radio"/> Select:Med Plus HealthSave Single	Plan Details >>		
Dental	<input checked="" type="radio"/> Waive			
	<input type="radio"/> Met Life Dental	Plan Details >>	\$0.00	\$0.00

■ [Calculate Costs](#) ■ [Continue >>](#)

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8. Enter the COBRA enrollment.



HOME ADMIN CLIENT ADMIN NEWS LIBRARY ROLE

User Admin Benefit Admin Time Off Admin Company Admin Reports Enrollment Import

Utah Demo Tester
-TOP DOG

- Search User
- Add User
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- Impersonate User
- Benefit Coverages
 - Enroll
 - End Coverages
 - Edit Coverages
- Special Enrollment
- Workflows
- Assign To Client

Enroll

Lee Bartholomew

[<< Back](#) ■ [Enroll Now >>](#)

Benefit Type	Benefit Plan	Amount	Employee Cost Per Pay Period	Employer Cost Per Pay Period
Health	Select:Med Plus HealthSave Family		\$381.48	\$0.00
	Lee A Bartholomew	Employee	Covered	
	Frank Bartholomew	Spouse	Covered	
	Marc Bartholomew	Child	Covered	
Dental	Met Life Dental		\$53.17	\$0.00
	Lee A Bartholomew	Employee	Covered	
	Frank Bartholomew	Spouse	Covered	
	Marc Bartholomew	Child	Covered	

Participation

I hereby acknowledge I have read the statements contained herein, or they have been read to me, and the statements are true and complete to the best of my knowledge. I understand any misrepresentation or omission contained herein may be used to reduce or deny claim or void the contract if such misrepresentation or omission affects acceptance of the risk. I hereby enroll for benefits for which I am presently eligible, or for which I may become eligible, under my employer's group contract(s). If any deductions are required for this coverage, I authorize such deductions from my earnings and I understand that any premiums will be automatically deducted from my paycheck on a pre-tax basis (before tax dollars) unless I submit a declination election. I reserve the right to revoke this deduction authorization at any time upon written notice.

Please verify all information above before enrolling.

I agree

[<< Back](#) ■ [Enroll Now >>](#)

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9. Check the “I agree” button and select “Enroll Now”.



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User Admin Benefit Admin Time Off Admin Company Admin Reports Enrollment Import

Utah Demo Tester -TOP DOG

- Add User
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- Impersonate User
- ▶ **Benefit Coverages**
 - Enroll
 - End Coverages
 - Edit Coverages
- Special Enrollment
- Workflows
- Assign To Client

Benefit Coverages

Maintain benefit coverages for an employee and their dependents.

Lee Bartholomew for 2008

Click benefit name for coverage history and costs.

Benefit	Benefit Plan	Tier/Amount	Cost Effective Date	Employee Cost Per Month	Employer Cost Per Month
Health	Select:Med Plus HealthSave Family	Employee + Family	10/1/2008	\$762.96	\$0.00
Lee A Bartholomew		Employee	Covered	10/1/2008 - 12/31/9999	
Frank Bartholomew		Spouse	Covered	10/1/2008 - 12/31/9999	
Marc Bartholomew		Child	Covered	10/1/2008 - 12/31/9999	
Health Savings Account					Not Covered
Dental	Met Life Dental	Employee + Family	10/1/2008	\$106.33	\$0.00
Lee A Bartholomew		Employee	Covered	10/1/2008 - 12/31/9999	
Frank Bartholomew		Spouse	Covered	10/1/2008 - 12/31/9999	
Marc Bartholomew		Child	Covered	10/1/2008 - 12/31/9999	
Voluntary Employee Life					Not Covered
Voluntary Spousal Life					Not Covered
Voluntary Child Life					Not Covered
Basic Employee AD&D					Not Covered
Long Term Disability					Not Covered
Retirement					Not Covered
Flexible Spending					Not Covered

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10. The COBRA enrollment is complete.