COBRApoint QB Import Specification

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DEFINES IMPORT VERSION 1.1 (see section 7 for more info)

Benaissance Company Confidential

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COBRApoint QB Import Specification

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COBRApoint QB Import Specification

1   Introduction and History

The COBRApoint Qualified Beneficiary (QB) Import system was designed to allow the easy importation of QB information into the COBRApoint system. It utilizes a Comma Separated Values (CSV) text file to input information about a QB. This specification is designed to explain the format and function of this import file.

2   Scope

This specification will explain the format and function of the import file used to import QBs into the COBRApoint system. It is not written to fully explain all the QB fields or to define any other imports other than the QB import.

3   Revision History

Revision 1.9, 9/25/2009 – Changed [QB] PremiumCouponType value from MONTHLYPREMIUMNOTICE to PREMIUMNOTICE to be consistent with production UI.

Revision 2002 (changed revision numbering) – changed wording of Leave Blank if PremiumAddressSameAsPrimary = False. Required if PremiumAddressSameAsPrimary = True
To
Leave Blank if PremiumAddressSameAsPrimary = True. Required if PremiumAddressSameAsPrimary = False

Revision 2003 – Added SendDODSubsidyExtension to QBLEGACY line. Set to true to have COBRApoint send the ARRA DOD Subsidy Extension letter at time of import

Revision 2004 – Made AEI2009SubsidyEligibleAttestationPostMarkDate a required field if the AEISubsidyStartDate is filled in

Revision 2005 – Member Specific Rates can have up to 4 digits after the decimal place, changed the data type from Money to Decimal for [QBPLANMEMBERSPECIFICRATE] and [QBPLANMEMBERSPECIFICRATEINITIAL] rates

Revision 2006 – Added 2nd Event AEI Subsidy Eligible Fields to [QBEVENT]

Revision 2007 – Made EndDate required on [QBSUBSIDYSCHEDULE] to be consistent with COBRApoint UI

Revision 2008 – Deprecated SendDODSubsidyExtension field on QBLEGACY

Revision 2009 – QBPLANINITIAL and QBDEPENDENTPLANINITIAL updated to reflect interaction with QBLEGACY

Revision 2010 – Updated verbiage around QBPLAN and QBPLANINITIAL

Revision 2011 – Added more values to QBEVENT EventType

Revision 2012 – Revised Revision 2011 and added missing text (QBEVENT EventType)

Revision 2013 – Added [Deprecated – do not use] to QB Premium address fields

Revision 2014 – Added BenefitGroup, AccountStructure, and ClientCustomData columns to [QB]

Revision 2015 – Removed FMLA from Employee Type to be consistent with UI

4   Definition of Terms

This document uses various terms that may have different meanings to different audiences. This section will help to explain these terms in the context of this document.

4.1   QB – Qualified Beneficiary

A QB is an individual that is eligible for COBRA benefits and needs to be entered into the COBRApoint system. A QB has a variety of information that must be entered when the QB is entered as well as a variety of optional information that may be entered with the QB.

4.2   CSV – Comma Separated Values file

A CSV file is a text file that contains values on each row that are separated by commas. Note that you should NOT use Excel to edit or save these files as Excel will alter the format of large numeric columns (such as SSN) and make them unreadable to COBRApoint.

4.3   Import Version

Each import file should include a [VERSION] section that identifies what import version format the import file is adhering to. If no [VERSION] record exists in the import file, then an error will be generates. The current version line should be:
[VERSION],1.1

4.4   Line Identifier

Each text line that is imported must have as its first field a "Line Identifier" (see section 5 below). This line identifier defines what fields come next on the text line.

5   Import File Process

A CSV import file should be created that matches the specifications defined in this document. Note that you should NOT use Excel to edit or save these files as Excel will alter the format of large numeric columns (such as SSN) and make them unreadable to COBRApoint. This import file might be built with a simple text editor (such as Notepad) or might be generated from an export program written for an existing database.

On the COBRApoint TPA Portal, Client Portal and Client Division Portal is a Utilities menu that has an Administrator Utilities sub-menu. There you will find the "Import" selection that will begin the import process.

> COBRApoint >> Utilities >> Administrator Utilities >> Import

Selecting the Import utility will display a page that will ask you to select a file. You may browse any of your local or network drives to locate and select the CSV import file (A file with a CSV extension). Next, clicking the "Import File" button will begin the upload and import process.

The Import process will start by uploading your CSV file to the COBRApoint system. After the upload it will begin scanning and importing the data in the file.

After the file has been imported a report will be displayed that explains the success or import failure of the file. This report may look something like the following:
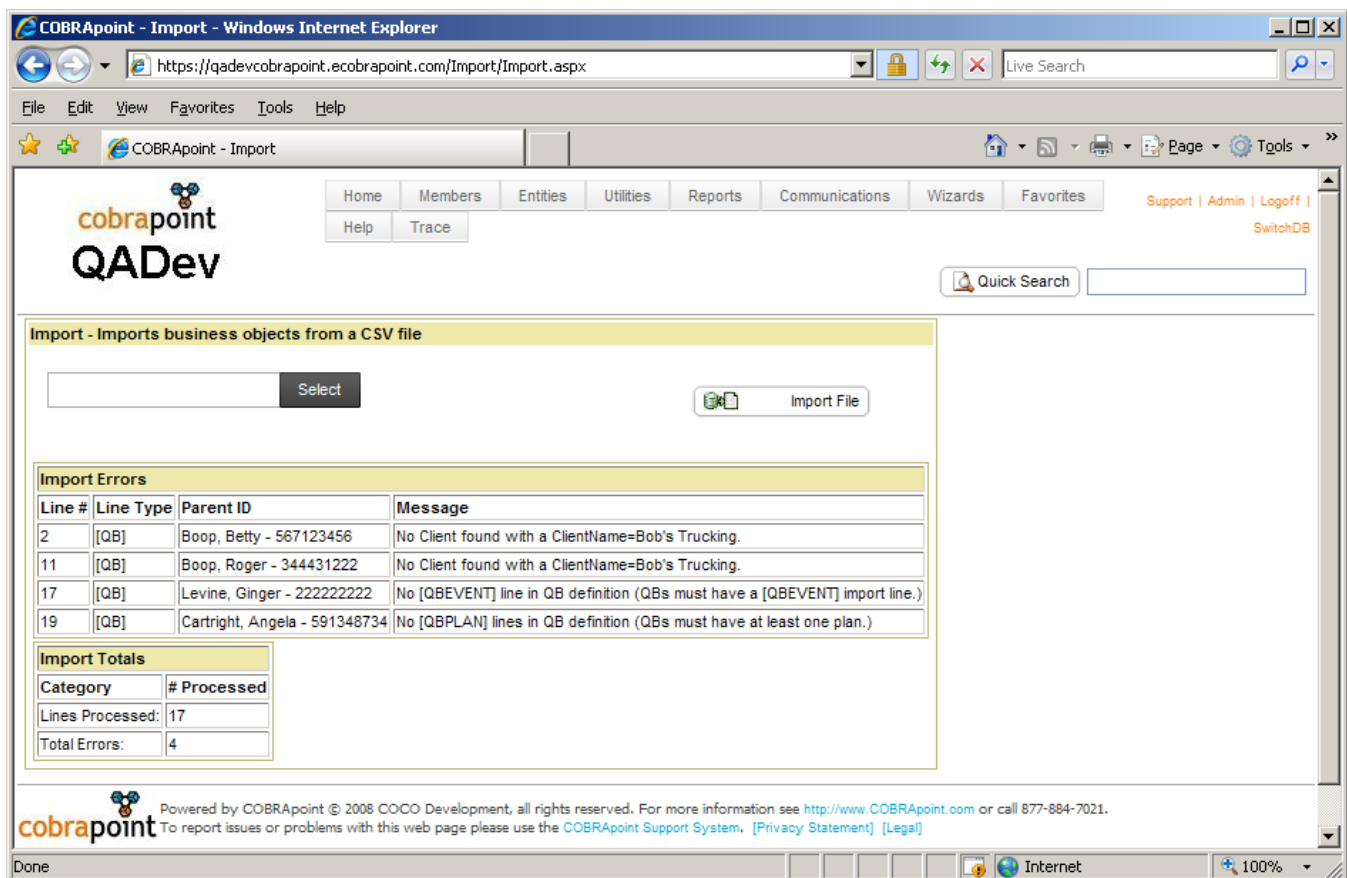
Any errors will have their line numbers displayed along with a description of the error. The Import Totals section at the bottom of the report will describe the total number of lines processed and the total number of errors encountered.

6   Import File Layout

The COBRApoint QB Import file is a CSV file where each line has values that are separated by commas. To allow for the importation of differing kinds of information the first field of each line defines what type of information will follow for the fields of that line. For instance, if you start to import a QB record you will need a QB line that starts with a line identifier of "[QB]" and might appear something like this:

    [QB], My Client Name, My Client Division Name, MR, Bob, L, Jones, 555555555,   (etc.)

This QB will then also need a line that defines the qualifying event information for the QB. This is accomplished with a line that begins with a line identifier of "[QBEVENT]" and the file might now appear something like this:

    [QB], My Client Name, My Client Division Name, MR, Bob, L, Jones, 555555555,   (etc.)
    [QBEVENT], TERMINATION, 5/1/2008, 1/1/1999, , ,   (etc.)

All of the lines that follow the "[QB]" line are related to that QB. When a new "[QB]" line is encountered, the previous QB is validated and saved to the database and the new QB begins the import process.

These "line identifiers" and their meaning are listed below:

Line Identifier	Required to	Description

	Complete a QB	
[QB]	☒	The main QB record
[QBEVENT]	☒	The QB's qualifying event information
[QBLEGACY]		The QB's legacy information. This is an option line and is only needed if the QB is a legacy QB.
[QBPLAN]	☒	Defines a single client plan that the QB is eligible for under COBRA. There must be at least one of these lines in the import file for each QB, but there may be several for each QB if the QB is eligible for more than one plan.
[QBDEPENDENT]		Defines a single dependent that is also eligible for COBRA under the QB. This is an option line, but there may be several of these lines for a QB if there are multiple dependents under this QB.
[QBDEPENDENTPLAN]		Defines a single QB Plan that a dependent is enrolled on for this QB. These records must be under the appropriate [QBDEPENDENT] record and there may be multiple of these for a single dependent.
[QBNOTE]		An option line that defines a note for a QB. There may be multiple of these for a single QB.
[QBSUBSIDYSCHEDULE]		Defines a single record of a subsidy schedule for a QB. These are optional and there may be several of these lines to define a schedule for multiple insurance types.
[QBSTATEINSERTS]		These are optional lines that may be added to describe the letter inserts that attached to a Specific Rights letter. There may be several of these defined for a single QB if needed.
[QBDISABILITYEXTENSION]		If the QB is on a Disability Extension this optional line is used to define the parameters of this extension.
[QBPLANMEMBERSPECIFICRATE]		If a QB is under a plan that has a rate type of "Member Specific Rates", then these lines are used to describe the rate to be used for this QB. These records should be immediately after the [QBPLAN} record that they refer to.
[QBPLANTERMREINSTATE]		If a QB has been terminated and/or reinstated on a Client Plan, then this line will define the parameters of that termination or reinstatement. These records should be immediately after the [QBPLAN] record that they refer to.
[QBAEI2009]		Used to set the AEI Status and whether or not 2nd Elections are Forced for Dependents
[QBAEI2009LEGACY]		If the QB has AEI in a prior system then this is used to import that information. Similar in concept to the QBLEGACY

		record but for AEI 2009. This line requires the [QBAEI2009] line.
[QBAEI20092NDELECTIONQBINSURANCETYPE]		The insurance types that are available to the QB for 2nd Election AEI 2009. This line requires the [QBAEI2009] line.

		record but for AEI 2009. This line requires the [QBAEI2009] line.
[QBAEI20092NDELECTIONQBINSURANCETYPE]		The insurance types that are available to the QB for 2nd Election AEI 2009. This line requires the [QBAEI2009] line.

7   Import Version Label

Each import file should include a [VERSION] section that identifies what import version format the import file is adhering to. If no [VERSION] record exists in the import file, then it is assumed it is adhering to Version 1. As new capabilities or changes are made to the import file format this document and the equivalent version number will be updated.

THIS REVISION OF THIS DOCUMENT DEFINES **VERSION 1.1** OF THE COBRAPOINT QB IMPORT.

8   Import Line Identifiers (Section Definitions)

The Line Identifiers that were explained in the section above each expect various fields to follow them on their respective line. The tables below define each of these fields for each of the Line Identifiers.

Required fields will need to have a value after the comma that corresponds to the data type specified. Non-required fields may be left blank (nothing appearing between the commas).

8.1   [VERSION]

Column Name	Data Type	Required	Accepted Values
VersionNumber	Integer	☒	Use "1" for this import specification (see section 5 for more information)

8.2   [QB]

Column Name	Data Type	Required	Accepted Values
ClientName	Text - 100	☒	The unique Client Name assigned in COBRApoint
ClientDivisionName	Text - 50	☒	The unique Client Division Name assigned in COBRApoint. If there are no Divisions, then use the ClientName
Salutation	Text - 35		MR, MRS, MS, MISS, DR
FirstName	Text - 50	☒	
MiddleInitial	Text - 1		
LastName	Text - 50	☒	
SSN	SSN	☒	Social Security Number
IndividualID	Text - 20		Optional, used to store Employee ID #s or any other type of secondary identification
Email	Email		
Phone	Phone		
Phone2	Phone		
Address1	Text - 50	☒	
Address2	Text - 50		

City	Text - 50	☒	
StateOrProvince	Text - 50	☒	
PostalCode	Text - 35	☒	
Country	Text - 50		Leave blank if the QB resides in the USA
PremiumAddressSameAsPrimary	Boolean	☒	Always set to True
PremiumAddress1	Text - 50		[Deprecated – do not use]
PremiumAddress2	Text - 50		[Deprecated – do not use]
PremiumCity	Text - 50		[Deprecated – do not use]
PremiumStateOrProvince	Text - 50		[Deprecated – do not use]
PremiumPostalCode	Text - 35		[Deprecated – do not use]
PremiumCountry	Text - 50		[Deprecated – do not use]
Sex	Sex	☒	M or F
DOB	Date	☒	Date of Birth – Needed for Age Rated Plans and also for the Medicare Letter
TobaccoUse	Text - 35	☒	YES, NO, UNKNOWN
EmployeeType	Text - 35	☒	FTE, PTE, H1B, CONSULTANT, SABBATICAL, PROBATIONARY, CONTINGENT, TELECOMMUTING, INTERN, GROUPLEADER, ASSOCIATE, PARTNER, UNKNOWN
EmployeePayrollType	Text - 35	☒	EXEMPT, NONEXEMPT, UNKNOWN
YearsOfService	Integer		Not used currently and only informational
PremiumCouponType	Text - 35	☒	PREMIUMNOTICE, COUPONBOOK, NONE
UsesHCTC	Boolean	☒	True if this QB uses the Health Care Tax Credit (HCTC) system
Active	Boolean	☒	Should always be set to TRUE
AllowMemberSSO	Boolean		Defaults to FALSE
BenefitGroup	Text - 50		
AccountStructure	Text - 50		
ClientSpecificData	Text - 50		

8.3   [QBEVENT]

8.3.1.1   EventType determines the Category of Event, either Employee or Dependent. Dependent EventTypes are: DIVORCELEGALSEPARATION, DEATH, INELIGIBLEDEPENDENT and MEDICARE. All other EventTypes are Employee.

Column Name	Data Type	Required	Accepted Values	
EventType	Text - 35	☒	DIVORCELEGALSEPARATION	
			DEATH	
			INELIGIBLEDEPENDENT	
			MEDICARE	
			TERMINATION	
			RETIREMENT	
			REDUCTIONINHOURS-STATUSCHANGE	
			REDUCTIONINFORCE	

			BANKRUPTCY
			STATECONTINUATION
			LOSSOFELIGIBILITY
			REDUCTIONINHOURS-ENDOFLEAVE
			WORKSTOPPAGE
			USERRA-TERMINATION
			USERRA-REDUCTIONINHOURS
			INVOLUNTARYTERMINATION
			TERMINATIONWITHSEVERANCE
EventDate	Date	☒	The Qualifying Event Date that the Event Type occurred on. Do not adjust for plan benefit termination types, just use the actual date of the event
EnrollmentDate	Date	☒	Original enrollment date of the member's current medical plan - used for HIPAA certificate to show length of continuous coverage
EmployeeSSN	SSN	☒	The original employee's SSN. Required if the Event Type is a dependent type event, such as DEATH, DIVORCELEGALSEPARATION, INELIGIBLEDEPENDENT or MEDICARE
EmployeeName	Text - 100	☒	The original employee's Name. Required if the Event Type is a dependent type event, such as DEATH, DIVORCELEGALSEPARATION, INELIGIBLEDEPENDENT or MEDICARE
SecondEventOriginalFDOC	Date		Required if this is a second event and should be set to the original First Day of COBRA (FDOC) of the original QB. This field is also required for IsSecondEventAEIEligible (below)
IsSecondEventAEIEligible	Boolean		Optional. If TRUE then this field indicates that the QB is eligible. Only valid for Second Event Original FDOC prior to 6/2/2010. ****All [QBPLAN] StartDate must be based on the Qualifying Event Date based FDOC, do not use the SecondEventOriginalFDOC for the [QBPLAN] StartDate field.
SecondEventAEISubsidyStartDate	Date		Optional. If IsSecondEventAEIEligible (above) is TRUE then set this to the appropriate Subsidy Start Date.

8.4 [QBLEGACY] – If Applicable

Column Name	Data Type	Required	Accepted Values
DateSpecificRightsNoticeWasPrinted	Date	☒	The date that the original specific rights notice was printed (or postmarked)
PostmarkDateOfElection	Date		If the QB has elected, then the date of that election (or the postmark of the election form receipt)
IsPaidThroughLastDayOfCOBRA	Boolean	☒	If the QB is paid all the way through the end of COBRA then set this to true, otherwise false
NextPremiumOwedMonth	Integer	☒	The month (1-12) of the next payment that is owed
NextPremiumOwedYear	Integer	☒	The year (for example 2009) of the next payment that is owed
NextPremiumOwedAmountReceived	Money	☒	Always set to 0
SendTakeoverLetter	Boolean	☒	Set to true if a takeover letter is to be sent to this legacy QB. Takeover letters are typically sent out when a QB is switching from one TPA to another
IsConversionLetterSent	Boolean	☒	Set to true if this legacy QB has already received a Conversion Letter. Conversion letters are sent out 180 days before the end of COBRA explaining the QB's right to convert their coverage
SendDODSubsidyExtension	Boolean	☒	~~Set to true if an ARRA DOD Subsidy Extension Letter should be sent after import~~ DEPRECATED – any value will be ignored, please set to FALSE

8.5 QB Plan Line Types

There are two types of Plan lines available for imports for QBs. [QBPLANINITIAL] and [QBPLAN]. The intent of [QBPLANINITIAL] is to provide a simple way to import QB Plan data making some initial assumptions. These assumptions are the StartDate will be calculated based on FDOC and the QB will be on this plan through their LDOC. [QBPLAN] is used instead when you need to specify the StartDate or EndDate, have multiple Plans spanning rate periods, use bundles, the QB is a legacy and any other scenario where you need to provide more detail during the import.

8.6 [QBPLANINITIAL]

The [QBPLANINITIAL] record type enters a QB initially on a plan with a coverage level. It assumes that the QB is on the plan from FDOC (First Day of COBRA) through LDOC (Last Day of COBRA). QBPLANINITIAL is not intended for use with Legacy QBs ([QBLEGACY] lines), for Legacy QBs please use the QBPLAN line instead.

Column Name	Data Type	Required	Accepted Values
PlanName	Text – 50	☒	The unique Client Plan Name
CoverageLevel	Text – 35	☒	EE, EE+SPOUSE, EE+CHILD, EE+CHILDREN, EE+FAMILY, EE+1, EE+2, EE+3,EE+4,SPOUSEONLY, SPOUSE+CHILD, SPOUSE+CHILDREN, CHILDONLY
NumberOfUnits	Integer		Sets the # of Units for this plan. Required if plan is Units Based (e.g. Life)

Example [QBPLANINITIAL] line:

[QBPLANINITIAL],Medical Plan,EE+FAMILY,,

8.7 [QBPLAN]

The [QBPLAN] record is for more advanced input of QB Plans for things like open enrollment, legacy QBs and special state continuation situations. Normal QB Plan records should be entered with the [QBPLANINITIAL] record instead.

Column Name	Data Type	Required	Accepted Values
PlanName	Text – 50	☒	The unique Client Plan Name
StartDate	Date	☒	The start date that the QB will begin coverage on this plan. This should be set to the First Day of COBRA for the Plan in the field above
EndDate	Date		Optional, the end date the QB will cease coverage on this plan. This should be set to the Last Day of COBRA for the Plan in the field above
CoverageLevel	Text – 35	☒	EE, EE+SPOUSE, EE+CHILD, EE+CHILDREN, EE+FAMILY, EE+1, EE+2, SPOUSEONLY, SPOUSE+CHILD, SPOUSE+CHILDREN, CHILDONLY
FirstDayOfCOBRA	Date		The First Day of COBRA. Unless you wish to override the calculated FDOC, this field

Column Name	Data Type	Required	Accepted Values
			should be left blank. If left blank COBRApoint will determine the FDOC based on the EventDate and the plan benefit termination type
LastDayOfCOBRA	Date		The Last Day of COBRA. This field should be left blank. COBRApoint will determine the LDOC based on the FDOC and COBRADurationMonths
COBRADurationMonths	Integer		The Number of months of COBRA is usually determined by the Event type. This may be left blank (preferred) and COBRApoint will determine the correct number of months. It is typically 18 months, but can be extended on Dependent Event Types and USERRA Event Types
DaysToElect	Integer		The Number of Days the QB has to Elect Coverage under COBRA. This may be left blank (preferred) and COBRApoint will determine the correct number of days. It is typically 60 days
DaysToMake1stPayment	Integer		The Number of Days the QB has to make their 1st full payment under COBRA. This may be left blank (preferred) and COBRApoint will determine the correct number of days. It is typically 45 days
DaysToMakeSubsequentPayments	Integer		The Number of Days the QB has to make their 1st full payment under COBRA. This may be left blank (preferred) and COBRApoint will determine the correct number of days. It is typically 45 days
ElectionPostmarkDate	Date		Always leave blank
LastDateRatesNotified	Date		Always leave blank
NumberOfUnits	Integer		Sets the # of Units for this plan. Required if plan is Units Based (e.g. Life)
SendPlanChangeLetterForLegacy	Boolean	☒	Set to True to send a plan change letter after this record is entered.
PlanBundleName	Text – 50		Conditionally required for plans that are part of a bundle.

Example [QBPLAN] line:

[QBPLAN],Medical Plan,12/1/2011,,EE+FAMILY,,,,,,,,,,,,

8.8 [QBDEPENDENT] - If Applicable

Column Name	Data Type	Required	Accepted Values
SSN	SSN		Social Security Number
Relationship	Text – 35	☒	SPOUSE, CHILD, DOMESTICPARTNER
Salutation	Text – 35		MR, MRS, MS, MISS, DR
FirstName	Text – 50	☒	
MiddleInitial	Text – 1		
LastName	Text – 50	☒	
Email	Email		

Phone	Phone		
Phone2	Phone		
AddressSameAsQB	Boolean	☒	Set to True if the Dependent's address is the same as the QB's address
Address1	Text – 50		
Address2	Text – 50		
City	Text – 50		
StateOrProvince	Text – 50		
PostalCode	Text – 35		
Country	Text – 50		Leave empty if the Dependent resides in the USA
EnrollmentDate	Date		Original enrollment date of the dependent's medical plan - used for HIPAA certificate
Sex	Sex		M or F (This is required if the dependent is on a Sex based plan that sets rates based on the dependent's Sex)
DOB	Date		Date of Birth (This is required if the dependent is on an Age based plan that sets rates based on the dependent's Age)
IsQMCSO	Boolean	☒	True if the Dependent is under a Qualified Medical Child Support Order (QMCSO)

8.9 [QBDEPENDENTPLANINITIAL]

The [QBDEPENDENTPLANINITIAL] record type enters a QB Dependent initially on a plan. It assumes that the dependent is on the plan from FDOC (First Day of COBRA) through LDOC (Last Day of COBRA). QBDEPENDENTPLANINITIAL is not intended for use with Legacy QBs ([QBLEGACY] lines), for Legacy QBs please use the QBDEPENDENTPLAN line instead.

Column Name	Data Type	Required	Accepted Values
PlanName	Text - 50	☒	The unique Client Plan Name

8.10 [QBDEPENDENTPLAN] - If Applicable

The [QBDEPENDENTPLAN] record is for more advanced input of QB Dependent Plan information such as a Dependent going on or off a plan over time. For the initial load of a QB Dependent Plan where the Dependent will be on the plan for the entire coverage period use the [QBDEPENDENTPLANINITIAL] record type instead.

Column Name	Data Type	Required	Accepted Values
PlanName	Text - 50	☒	The unique Client Plan Name
StartDate	Date	☒	The start date of the dependent on the plan. This should be set to the First Day of COBRA (FDOC) for the Plan in the field above.
EndDate	Date		The end date of the dependent on the plan. This should be set to the Last Day of COBRA (LDOC) for the Plan in the field above unless it is known that the Dependent will be ending the plan before LDOC
UsesFDOC	Boolean	☒	Set to True if the Dependents plan starts on the QB's FDOC (First Day of COBRA)

8.11 [QBNOTE] - If Applicable

Column Name	Data Type	Required	Accepted Values
NoteType	Text – 35	☒	MANUAL, AUTONOTE
DateTime	DateTime	☒	Date and Time of the note
NoteText	Text - 2000	☒	
UserName	UserName		Always leave blank

8.12 [QBSUBSIDYSCHEDULE] - If Applicable

Column Name	Data Type	Required	Accepted Values
InsuranceType	Text – 35	☒	MEDICAL, DENTAL, VISION, PHARMACY, FSA, HCRA, EAP, GAP, 401K, LIFE, MSA, PBA, HSA, NUOTHER1, GRPLIFE, VOLLIFE, CANCER, MERP, DEPLIFE1, DEPLIFE2, DEPLIFE3, LTD, AD&D, MEDSTURIDER1, MEDSTURIDER2, MEDSTURIDER3, NULIFE, NUGRPLIFE, NUVOLLIFE, NUDEPLIFE1, NUDEPLIFE2, NUDEPLIFE3, NUOTHER
SubsidyAmountType	Text – 35	☒	FLAT, PERCENTAGE
StartDate	Date	☒	Start date of the subsidy
EndDate	Date	☒	End date of the subsidy
Amount	Money	☒	Amount if FLAT or Percentage if PERCENTAGE of the subsidy. For example, use "50" if it is a 50% subsidy and the SubsidyAmountType is set to PERCENTAGE
SubsidyType	Text – 35		EMPLOYER,AEI2009 (defaults to EMPLOYER)

8.13 [QBSTATEINSERTS] - If Applicable

Column Name	Data Type	Required	Accepted Values
StateSpecificDocumentName	Text - 35	☒	CA-SRINSERT, CT-SRINSERT, MN-LIFEINSERT, MN-CONTINSERT, OR-SRINSERT, TX-SRINSERT, MN-SUBSIDYINSERT, NY-SR INSERT, IL-SRINSERT, VEBA-SRINSERT

8.14 [QBDISABILITYEXTENSION] - If Applicable

Column Name	Data Type	Required	Accepted Values
DisabilityApproved	Boolean	☒	Set to True if the Disability Extension is Approved or False if it is not
PostmarkOfDisabilityExtension	Date	☒	Set to the postmark date that the Disability Extension when it was received
DateDisabled	Date	☒	The date the member was disabled
DenialReason	Text -35		DISABILITYDATE, SUBMISSIONDATE – Required if DisabilityApproved is FALSE

8.15 [QBPLANMEMBERSPECIFICRATEINITIAL] - If Applicable

The [QBPLANMEMBERSPECIFICRATEINITIAL] record type is used to enter a member specific rate for a plan. It assumes that the rate will be applied from FDOC (First Day of COBRA) through LDOC (Last Day of COBRA). [QBPLANMEMBERSPECIFICRATEINITIAL] must only be used with a corresponding [QBPLANINITIAL] – it does not work with [QBPLAN]

Column Name	Data Type	Required	Accepted Values
PlanName	Text – 50	☒	Unique Client plan name

Rate	Decimal	☒	The amount of the member specific rate

8.16 [QBPLANMEMBERSPECIFICRATE] - If Applicable

The [QBPLANMEMBERSPECIFICRATE] record is for advanced input of member specific rates that change over time. For the initial load of a member specific rate that does not change use the [QBPLANMEMBERSPECIFICRATEINITIAL] record type instead as it will automatically adjust the start date and end date for the entire coverage period. However, if you use [QBPLANMEMBERSPECIFICRATEINITIAL] you must use [QBPLANINITIAL] instead of [QBPLAN] for any QB Plan records.

Column Name	Data Type	Required	Accepted Values
PlanName	Text – 50	☒	Unique Client plan name
StartDate	Date	☒	The start date of the member specific rate on the plan. This should be set to the First Day of COBRA (FDOC) for the Plan in the field above.
EndDate	Date		End Date of the member specific rate
Rate	Decimal	☒	The amount of the member specific rate

8.17 [QBPLANTERMREINSTATE] - If Applicable

Column Name	Data Type	Required	Accepted Values
PlanName	Text – 50	☒	Unique Client plan name
TermOrReinstate	Text – 20	☒	TERMINATE or REINSTATE
EffectiveDate	Date	☒	Effective date of the term or reinstate
Reason	Text - 35	☒	Reason for the termination or reinstatement

8.18 [QBAEI2009] – Optional (Required for AEI 2009)

Column Name	Data Type	Required	Accepted Values
AEI2009StatusTypeName	Text – 35	☒	ELIGIBLE,INELIGIBLE,UNKNOWN
IsAEI20092ndElectionForcedToDependents	Boolean	☒	

8.19 [QBAEI2009LEGACY] – Optional

Column Name	Data Type	Required	Accepted Values
AEI2009NotificationPrintedDate	Date	☒	
AEI20092ndElectionPrintedDate	Date		
AEI20092ndElectionDaysToElect	Integer		
AEI20092ndElectionElectedPostMarkDate	Date		
AEI2009SubsidyWaiverPostMarkDate	Date		
AEI2009SubsidyEligibleAttestationPostMarkDate	Date	*	Required if AEI2009SubsidyStartDate is filled in
AEI2009SubsidyStartDate	Date	☒*	Required if the QB had the

			AEI2009 ARRA Subsidy start in the prior system

8.20 [QBAEI20092NDELECTIONQBINSURANCETYPE] – Optional

Column Name	Data Type	Required	Accepted Values
InsuranceTypeName	Text - 35	☒	MEDICAL, DENTAL, VISION, PHARMACY, FSA, HCRA, EAP, GAP, 401K, LIFE, MSA, PBA, HSA, NUOTHER1, GRPLIFE, VOLLIFE, CANCER, MERP, DEPLIFE1, DEPLIFE2, DEPLIFE3, LTD, AD&D, MEDSTURIDER1, MEDSTURIDER2, MEDSTURIDER3, NULIFE, NUGRPLIFE, NUVOLLIFE, NUDEPLIFE1, NUDEPLIFE2, NUDEPLIFE3, NUOTHER
AEI20092ndElectionPostMarkDate	Date	☒	

9 Data Types

The data types that used in the various import sections are defined below. Note that the fields in the import file are all text fields (since it is a CSV file) and that the definitions below explain the formatting of the text in that field.

Data Type	Definition
Text	Can be any text value up to the number of characters specified. If the text contains a comma, then the entire field should be enclosed in double quotes (")
Integer	Can be any number from 0 to 32,767. No punctuation
Date	Entered as MM/DD/YYYY, where MM is the month, dd is the day and yyyy is the year. You can use a single digit or two digit leading zero for the month and day. The year should always be entered as 4 digits
DateTime	Entered as MM/DD/YYYY HH:mm AM, where MM is the month, dd is the day and yyyy is the year, HH is the hour, mm is the minute and AM is either AM or PM. You can use a single digit or two digit leading zero for the month, day, hour and minute. The year should always be entered as 4 digits
Boolean	True = "1", "Y", "YES", "T" or "TRUE", False="0", "N", "NO", "F" or "FALSE"
Money	Format as number with one period, no commas and always have at least one digit to the left of the period and 2 digits to the right of the period. IE: 12 cents would be entered 0.12
SSN	Format as 9 digits – can also include the dashes. Note that leading zeros are required if the SSN begins with zeros
Sex	Single character where M = Male, F = Female
Phone	Format as 10 digits - no punctuation
Email	Text – 100, with at least one "@" and at least one "." After the @
UserName	Text – 50. Note that this field MUST match an existing user in the system, but may be left empty, in which case the UserName of the person doing the Import will be used as the UserName for the record
Decimal	Format as number with one period, no commas and have at least one digit to the left of the period and up to 4 digits after the period. Example. 0.1234

10 Sample Import File

The following text is the contents of a sample file that demonstrates the import of a QB.

[VERSION], 1.1
[QB],Bob's Trucking, Bob's Trucking,MR,Ronald,,McDonnald,655-24-9052,,,7488872482,,1909 Reidsview Dr,,White Lake,MI,48383,,Y,,,,,,,,7/27/1959,UNKNOWN,UNKNOWN,UNKNOWN,0,NONE,N
[QBEVENT],TERMINATION,8/12/2007,2/1/2006,,,F,
[QBLEGACY],8/29/2007,10/31/2007,N,4,2008,$0.00,N,N
[QBPLAN],Z3,9/1/2007,,EE+FAMILY,9/1/2007,3/1/2009,18,60,45,30,,,0,N
[QBPLAN],Human Indurance Corp Traditional Dental,9/1/2007,,EE+FAMILY,9/1/2007,3/1/2009,18,60,45,30,10/31/2007,,0,N
[QBPLAN],Professional Insurance Plan C,9/1/2007,,EE+FAMILY,9/1/2007,3/1/2009,18,60,45,30,10/31/2007,,0,N
[QBDEPENDENT],085-48-1854,SPOUSE,MRS,Deborah,,McDonnald,,,,N,1909 Reidsview Dr,,White Lake,MI,48383,,2/1/2006,F,7/24/1964,N
[QBDEPENDENTPLAN],Z3,8/12/2007,,N