COBRA Newly Eligible and/or Qualified Beneficiaries

Interface Requirements Specification

# Northwest Orthopaedic Specialists

# Contact Information

## Customer Contact

|  |  |  |
| --- | --- | --- |
| **Name** | **Tel** | **Email** |
| Kate Salmon | 3109124492 | kates@anconservices.com |

## Integration Contact

|  |  |  |
| --- | --- | --- |
| **Name** | **Tel** | **Email** |
| Cheryl Petitti | 720 217 6598 | cpetitti@tekpartners.com |

# Customer Confirmation

General

1. **Vendor Name:**WEX/Discovery Benefits
2. **Confirm Group or Plan Number:**

41587

1. **Are there any Employee Types, Pay Groups, Org Levels, etc. that need to be excluded?**

☒ No ☐ Yes

If Yes, please list field and values to exclude or include *(whichever is a shorter list)*:

Please include test employees during test (emp type = TES)

1. **Which Employees would you like to include on this export?**☒ New Hires and Employees or Deps Termed on Applicable Deduction Code
2. Confirm the applicable UltiPro Deduction Codes for each that apply:

**UltiPro Deduction Code**

ADEN1, ADEN2, AVIS, KMP, UHEPO, UHMOH, UPPOH, UPPOS, UHMOL, UPPOL, FSA

# Vendor Confirmation

Default is to send blank files. Can the vendor accept blank files? Yes

NPM File

1. Which newly eligible member option should we send on the file? \_\_4\_\_\_\_\_\_\_\_

Option 1 - Anyone newly enrolled in any deduction is valid

Option 2 - All new enrollees with no previous plan since their Date of Last Hire (eecDateOfLastHire)

Option 3 - All new enrollees with no previous plan in all history.

Option 4 - All new enrollees & re-enrollees with no active plan since their Date of Last Hire (eecDateOfLastHire). Re-enrollments into the same DedCode are considered under this option. For example, the employee may have been enrolled in **MED1** during his/her original employment and then was rehired at a later date and re-enrolled in **MED1**. NewEnrolleeType = ‘4’ will consider this re-enrollment scenario as valid in the New Enrollee Module.

This vendor wants to see Employee records and they want to see a record for the Spouse if the Spouse is added after the employee and has no prior coverage

Please make sure to add these conrelationship codes - SPS or DP

Qualified Beneficiaries/Qualified Enrollees

1. Are there life events where the vendor does not want the employee sent on the file?
   1. Death, Divorce, Dep at Max Age

# Mapping/Notes to Developer

File Format = CSV - changes only file

IMPORTANT NOTE – This is a combined NPM and QB File

Please use the existing WEX/Discovery Benefits combined NPM/QB template when building this file

Client Name

Ancon Marine Inc 41587

Client Division Name

If EecCoID =49VMT (ANCON) send Ancon Marine

If EecCoID = 49VSW (HH) send Hardin Holdings

Plan Names

Employee Record

When EedDedCode = ADEN1 send Anthem CA Dental HMO

When EedDedCode = ADEN2 send Anthem CA Dental PPO

When EedDedCode = AVIS send Anthem CA Vision

When EedDedCode = KMP send Kaiser CA Medical HMO

When EedDedCode = UHEPO send UnitedHealthcare Medical EPO

When EedDedCode = UHMOH send UnitedHealthcare Medical High HMO

When EedDedCode = UPPOH send UnitedHealthcare Medical High PPO

When EedDedCode = UPPOS send UnitedHealthcare Medical HSA HDHP

When EedDedCode = UHMOL send UnitedHealthcare Medical Low HMO

When EedDedCode = UPPOL send UnitedHealthcare Medical Low PPO

When EedDedCode = FSA send WEX FSA

Dependent Record

When DbnDedCode = ADEN1 send Anthem CA Dental HMO

When DbnDedCode = ADEN2 send Anthem CA Dental PPO

When DbnDedCode = AVIS send Anthem CA Vision

When DbnDedCode = KMP send Kaiser CA Medical HMO

When DbnDedCode = UHEPO send UnitedHealthcare Medical EPO

When DbnDedCode = UHMOH send UnitedHealthcare Medical High HMO

When DbnDedCode = UPPOH send UnitedHealthcare Medical High PPO

When DbnDedCode = UPPOS send UnitedHealthcare Medical HSA HDHP

When DbnDedCode = UHMOL send UnitedHealthcare Medical Low HMO

When DbnDedCode = UPPOL send UnitedHealthcare Medical Low PPO

Coverage Level

When reporting Divorce, Death and Dependent at Max Age Events

If edhChangeReason = 204, LEVNT4, 201, LEVNT3 or 210 and

If bdmrelationship = DP, SPS and 1 CHD, CHL, DPC, STC send EE+CHILD

If bdmrelationship = DP, SPS and more than 1 CHD, CHL, DPC, STC send EE+CHILDREN

If bdmrelationship = more than 1 CHD, CHL, DPC, STC send EE+CHILDREN

else send EE

When reporting all other events

If edhChangeReason is not 204, LEVNT4, 201, LEVNT3 or 210 and If EedDedCode = ADEN1, ADEN2, AVIS, KMP, UHEPO, UHMOH, UPPOH, UPPOS, UHMOL, UPPOL and

EedBenOption = EE, EREE send EE

EedBenOption = EEC, ERECC and 1 CHD, CHL, DPC, STC send EE+CHILD

EedBenOption = EEC, ERECC and more than 1 CHD, CHL, DPC, STC send EE+CHILDREN

EedBenOption = EEDP, ERDP send EE+DOMESTICPARTNER

EedBenOption = DGF, EEDPF, EEF, EREEF send EE+FAMILY

EedBenOption = EES, EREES send EE+SPOUSE

When EedDedCode = FSA send EE

EdhEffDate - use this date for the event date on non-ee events (ineligible dep, divorce and death). This is the date the change was keyed in Ulti and is displayed as the Effective Date on the History tab.

If vendor needs the original enrollment date, note it as the oldest Eedbenstartdate or oldest DbnBenStartDate.

Update the values below in yellow. Leave all lines below in this document so the Developer can copy and paste them into the file.

-- COBRA parameters

INSERT INTO dbo.U\_dsi\_BDM\_Configuration VALUES (@FormatCode,'RunID','QB');

INSERT INTO dbo.U\_dsi\_BDM\_Configuration VALUES (@FormatCode,'AddToPreviousRun','Y'); - only used for NPM/QB combined files

INSERT INTO dbo.U\_dsi\_BDM\_Configuration VALUES (@FormatCode,'UseCobraCoveredDeds','Y'); -- DedIsCobraCovered = 'Y'

INSERT INTO dbo.U\_dsi\_BDM\_Configuration VALUES (@FormatCode,'CobraType','4'); -- Eep/ConCobraReason first, then EdhChangeReason. Include CHGRP for elig. ben groups –

INSERT INTO dbo.U\_dsi\_BDM\_Configuration VALUES (@FormatCode,'CobraDate','3'); -- EedBenStopDate and DbnBenStopDate, unless Eep/ConDateOfCOBRAEvent exists –

INSERT INTO dbo.U\_dsi\_BDM\_Configuration VALUES (@FormatCode,'CobraPQBType','1'); -- If no EE or spouse, ALL children are PQB (not just oldest) – include this line if deps are sent as QB and not the employee.

INSERT INTO dbo.U\_dsi\_BDM\_Configuration VALUES (@FormatCode,'CobraReasonsDepPQB','201,204,210,LEVNT3,LEVNT4'); -- Add valid dependent edhchangereasons

INSERT INTO dbo.U\_dsi\_BDM\_Configuration VALUES (@FormatCode,'InvalidCobraReasonsEmp','201,204,210,LEVNT3,LEVNT4'); -- Invalidate employee when Cobra Reason is a dependent PQB reason – Add valid dependent edhchangereasons (should be same as previous line above)

INSERT INTO dbo.U\_dsi\_BDM\_Configuration VALUES (@FormatCode,'InvalidTermReasonsEmp','203'); -- Invalidate employee when Cobra Reason is "Death". Add the Death employment term reason (eectermreason)

INSERT INTO dbo.U\_dsi\_BDM\_Configuration VALUES (@FormatCode,'ConCobraReasonPCF','DependentCOBRAReason'); -- Valid dependent PQB reasons – used when clients have Platform Configurable fields. Add any other field names the client is using.

INSERT INTO dbo.U\_dsi\_BDM\_Configuration VALUES (@FormatCode,'CountDependents','Y');

INSERT INTO dbo.U\_dsi\_BDM\_Configuration VALUES (@FormatCode,'RelationshipsSpouse','SPS'); - update to the spouse relationship code

INSERT INTO dbo.U\_dsi\_BDM\_Configuration VALUES (@FormatCode,'RelationshipsChild', CHD, CHL, DPC, STC); - update to the child relationship codes

INSERT INTO dbo.U\_dsi\_BDM\_Configuration VALUES (@FormatCode,'RelationshipsDomPartner','DP'); - update to the domestic partner relationship code

INSERT INTO dbo.U\_dsi\_BDM\_Configuration VALUES (@FormatCode,'BuildConsolidatedTable','Standard'); - same for all files