COBRA Newly Eligible and/or Qualified Beneficiaries

Interface Requirements Specification

# Columbia Forest Products

# Contact Information

## Customer Contact

| **Name** | **Tel** | **Email** |
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## Integration Contact

| **Name** | **Tel** | **Email** |
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# Customer Confirmation

General

1. **Vendor Name:**TRI-AD
2. **Confirm Group or Plan Number:**

NA

1. **Will you have employees that are active in multiple component companies?**

☒ No ☐ Yes

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**

MBMO, MBOH, MBOHO, MBVA, MBUMO, MBUOH, MBUO, MBUVA, MHSMO, MHSOH, MHSO, MHSVA, DNBUO, DENBU, DENB, VIS, VISO

# Vendor Confirmation

Default is to send blank files. Can the vendor accept blank files? No

NPM Records

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.

Please make sure to add these conrelationship codes – SPS, EX

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

This is a combined NPM and QB File

Notes for Developer

This is a .csv file

This is a combined New Hire and Termination File

This a changes only file

Please note that if there is no data on the file the vendor does not want a file sent to them

The file should contain no headers or footers

ALL fields should be enclosed in quotation (“) marks to prevent field values containing commas from causing column count issues during processing.

Standard carriage return and line feed characters to terminate each record should be used

This format requires one row for each participant and plan (employee one row with their benefits and one row for each of their dependents)

We will need Scheduled, On Demand, Test sessions

Employees and dependents with the deduction codes below will be included on this file

500 = PPO Medical

501 = FSA Healthcare

520 = CDHP

524 = Dental

525 = Vision

Selection set to include:

* Employees and dependents that qualify for COBRA following a COBRA qualifying event (QE). Employees / dependents meeting these criteria (QBs) are to be sent one time only. QBs will have lost medical, dental, vision, and / or health care FSA.
* Dependents that lose medical, dental, vision, and/or health FSA as a result of a change in their eligibility status
* If the QE pertains to the employee, then the applicant (APP) record is to be created with the employee’s information. Any dependents losing coverage as a result of the employee’s event will be passed as dependent (DEP) records.
* If the QE pertains to a dependent (e.g. divorce or legal separation; death of the employee; or a child loses eligibility), the APP record is to be created with the spouse’s/DP’s information. Other dependents losing coverage will be passed as DEP records of the spouse’s/DP’s APP record.

If the QE pertains to only dependent children, populate an APP record with the eldest dependent child’s information and pass the other children as DEP records

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, EX'); - update to the spouse relationship code

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

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