COBRA Newly Eligible and/or Qualified Beneficiaries

Interface Requirements Specification

# Gary D. Nelson

# Contact Information

## Customer Contact

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| --- | --- | --- |
| **Name** | **Tel** | **Email** |
| Katie Shultz | 707.939.4015 | kschulz@nelsonhr.com |

## Integration Contact

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| **Name** | **Tel** | **Email** |
| Richard Vars | 352.213.0066 | rvars@tekpartners.com |

# Customer Confirmation

General

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

37424

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)*:

Groups to exclude – eecemptype = TES

1. **Which Employees would you like to include on this export?** Employees Active on Applicable Deduction Code
2. **When did you start coverage with this provider:**9/1/2020
3. **Confirm the applicable UltiPro Deduction Codes for each that apply:**

**UltiPro Deduction Code**

BCHSA, BCPPO, KAHSA, LPFSA, KAHMO, KHSAS, KHMOS, DEN, VSN, FSA

# Vendor Confirmation

Newly Eligible/General Notices

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.

Qualified Beneficiaries/Qualified Enrollees

1. Are there life events where the vendor does not want the employee sent on the file? NO
   1. If Yes, please list them
2. Are there any special requirements the vendor has for specific live events?

* For the events DEATH and DIVORCELEGALSEPARATION, the surviving spouse and divorced spouse should be elevated to the QB Record. The deceased employee or divorced employee’s Name and SSN should be populated in the QBEVENT Record.  Any additional dependents should be listed as dependents of the elevated spouse. The event INELIGIBLEDEPENDENT is similar in format to these events.  The aged out dependent should be elevated to the QB Record and the Employee’s Name and SSN should be populated in the QBEVENT Record. I’ve attached the Scorecard for more info on formatting these events.

# Mapping/Notes to Developer

Sample file has been added to client folder.

Copy and paste any other info from the vendor’s email below that would be helpful to the QA or Developer.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Client Name: | Division Name(s): | Bundle Name(s): | Plan Name(s): | Coverage Level: | UltiPro Ded Code |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff |  | Anthem CA Medical BlueCross 1500 HDHP Staff | EE | BCHSA |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff |  | Anthem CA Medical BlueCross 1500 HDHP Staff | EE+SPOUSE | BCHSA |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff |  | Anthem CA Medical BlueCross 1500 HDHP Staff | EE+CHILDREN | BCHSA |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff |  | Anthem CA Medical BlueCross 1500 HDHP Staff | EE+FAMILY | BCHSA |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff |  | Anthem CA Medical BlueCross Classic 750 PPO Staff | EE | BCPPO |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff |  | Anthem CA Medical BlueCross Classic 750 PPO Staff | EE+SPOUSE | BCPPO |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff |  | Anthem CA Medical BlueCross Classic 750 PPO Staff | EE+CHILDREN | BCPPO |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff |  | Anthem CA Medical BlueCross Classic 750 PPO Staff | EE+FAMILY | BCPPO |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff |  | Anthem CA Dental BlueCross Complete PPO Staff | EE | DEN |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff |  | Anthem CA Dental BlueCross Complete PPO Staff | EE+SPOUSE | DEN |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff |  | Anthem CA Dental BlueCross Complete PPO Staff | EE+CHILDREN | DEN |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff |  | Anthem CA Dental BlueCross Complete PPO Staff | EE+FAMILY | DEN |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff |  | Anthem CA Vision BlueCross Blueview Staff | EE | VSN |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff |  | Anthem CA Vision BlueCross Blueview Staff | EE+SPOUSE | VSN |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff |  | Anthem CA Vision BlueCross Blueview Staff | EE+CHILDREN | VSN |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff |  | Anthem CA Vision BlueCross Blueview Staff | EE+FAMILY | VSN |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff |  | HSA Bank FSA | EE | FSA |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff |  | HSA Bank Limited FSA | EE | LPFSA |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff NCAL |  | Kaiser CA Medical GDNA Staff 2800 HSA NCAL | EE | KAHSA |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff NCAL |  | Kaiser CA Medical GDNA Staff 2800 HSA NCAL | EE+SPOUSE | KAHSA |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff NCAL |  | Kaiser CA Medical GDNA Staff 2800 HSA NCAL | EE+CHILDREN | KAHSA |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff NCAL |  | Kaiser CA Medical GDNA Staff 2800 HSA NCAL | EE+FAMILY | KAHSA |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff NCAL |  | Kaiser CA Medical GDNA Staff DHMO NCAL | EE | KAHMO |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff NCAL |  | Kaiser CA Medical GDNA Staff DHMO NCAL | EE+SPOUSE | KAHMO |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff NCAL |  | Kaiser CA Medical GDNA Staff DHMO NCAL | EE+CHILDREN | KAHMO |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff NCAL |  | Kaiser CA Medical GDNA Staff DHMO NCAL | EE+FAMILY | KAHMO |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff SCAL |  | Kaiser CA Medical GDNA Staff 2800 HSA SCAL | EE | KHSAS |
| Gary D Nelson & Associates 37424 | Gary D Nelson Staff SCAL |  | Kaiser CA Medical GDNA Staff 2800 HSA SCAL | EE+SPOUSE | KHSAS |
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