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| **COBRApoint QB Import Specification**  **October 6, 2010**  **DEFINES IMPORT VERSION 1.1 (see section 7 for more info)**  ***Benaissance Company Confidential*** |
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| |  |  |  |  | | --- | --- | --- | --- | | **Author:** | Preston Hehr, Senior .Net Developer | | | | **Revision** | 2015 | **Revised:** | 4/26/2012 | |
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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

Revision 2016 – Added AllowMemberSSO column

## 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

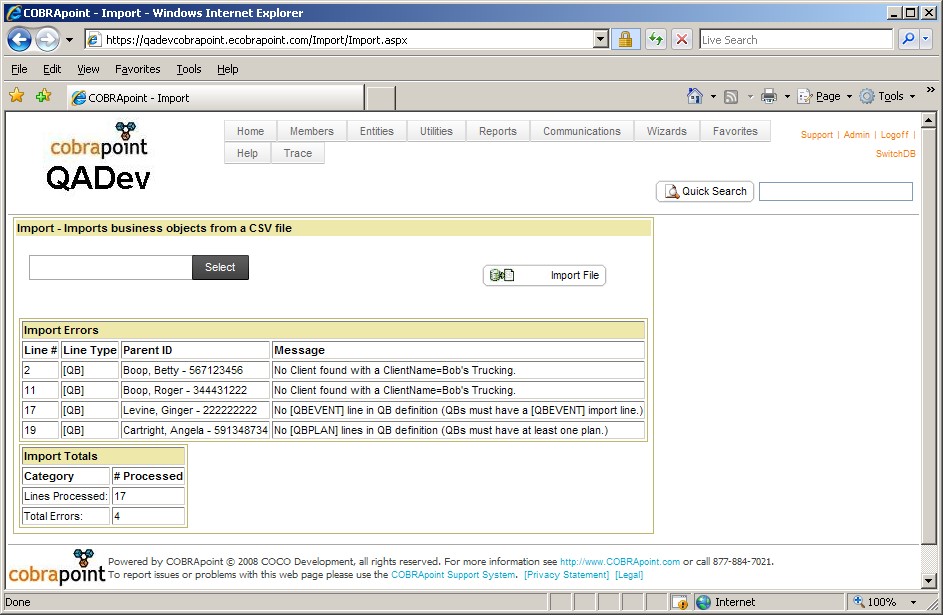
Administrator Utilities sub-menu. There you will find the “Import” selection that will begin the import process.

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. |

## 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. Nonrequired fields may be left blank (nothing appearing between the commas).

### 8.1 [VERSION]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Data Type** | **Required** | **Accepted Values** | **UltiPro Field Mapping Notes** |
| VersionNumber | Integer |  | Use “1” for this import specification (see section 5 for more information) | Hardcode  1.1 |
|  |  |  |  |  |

|  |
| --- |
| Developer Notes for QB Record |
| If term due to one of the reasons below, do not send the employee, only send the deps losing coverage.   |  |  | | --- | --- | | Death of the Employee | edhChangeReason = 210 or EecEmplStatus = T and EecTermReason = 203 | | Divorce/Legal Separation | edhChangeReason = LEVNT4 or 204 | | Dependent Ceasing to be Dep | edhChangeReason = 201 | |  |  | |

### 8.2 [QB]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Data Type** | **Required** | **Accepted Values** | **UltiPro Field Mapping Notes** |
| ClientName | Text - 100 |  | The unique Client Name assigned in COBRApoint | TAE Technologies, Inc |
| ClientDivisionName | Text - 50 |  | The unique Client Division Name assigned in COBRApoint. If there are no Divisions, then use the ClientName | TAE Technologies, Inc |
| Salutation | Text - 35 |  | MR, MRS, MS, MISS, DR | Leave Blank |
| FirstName | Text - 50 |  |  | If edhChangeReason = LEVNT4, 204, 210 or 201 send connamefirst  else send Eepnamefirst |
| MiddleInitial | Text - 1 |  |  | If edhChangeReason = LEVNT4, 204, 210 or 201 send 1st digit of connamemiddle  else send 1st digit of eepnamemiddle |
| LastName | Text - 50 |  |  | If edhChangeReason = LEVNT4, 204, 210 or 201 send connamelast  else send Eepnamelast |
| SSN | SSN |  | Social Security Number | If edhChangeReason = LEVNT4, 204, 210 or 201 send conssn  else send Eepssn  send all 9 digits (including leading zeros) |
| IndividualID | Text - 20 |  | Optional, used to store Employee ID #s or any other type of secondary identification | EecEmpNo |
| Email | Email |  |  | If edhChangeReason = LEVNT4, 204, 210 or 201 send ConEmailAddr  else send eepAddressEMailAlternate |
| Phone | Phone |  |  | If edhChangeReason = LEVNT4, 204, 210 or 201 send ConPhoneHomeNumber  else send EepPhoneHomeNumber (please make sure this is the EE Primary Home Phone) |
| Phone2 | Phone |  |  |  |
| Address1 | Text - 50 |  |  | If edhChangeReason = LEVNT4, 204, 210 or 201 send ConAddressLine1  else send EepAddressLine1 |
| Address2 | Text - 50 |  |  | If edhChangeReason = LEVNT4, 204, 210 or 201 send ConAddressLine2  else send EepAddressLine2 |
| City | Text - 50 |  |  | If edhChangeReason = LEVNT4, 204, 210 or 201 send ConAddressCity  else send EepAddressCity |
| StateOrProvince | Text - 50 |  |  | If edhChangeReason = LEVNT4, 204, 210 or 201 send ConAddressState  else send EepAddressState |
| PostalCode | Text - 35 |  |  | If edhChangeReason = LEVNT4, 204, 210 or 201 send ConAddressZipCode  else send EepAddressZipCode |
| Country | Text - 50 |  | Leave blank if the QB resides in the USA | Leave Blank |
| PremiumAddressSameAsPrimary | Boolean |  | Always set to True | Hardcode  TRUE |
| PremiumAddress1 | Text - 50 |  | [Deprecated – do not use] | Leave Blank |
| PremiumAddress2 | Text - 50 |  | [Deprecated – do not use] | Leave Blank |
| PremiumCity | Text - 50 |  | [Deprecated – do not use] | Leave Blank |
| PremiumStateOrProvince | Text - 50 |  | [Deprecated – do not use] | Leave Blank |
| PremiumPostalCode | Text - 35 |  | [Deprecated – do not use] | Leave Blank |
| PremiumCountry | Text - 50 |  | [Deprecated – do not use] | Leave Blank |
| Sex | Sex |  | M or F | If eepgender or ConGender = M send M  If eepgender or ConGender = F send F  Else send U |
| DOB | Date |  | Date of Birth – Needed for Age Rated Plans and also for the Medicare Letter | If edhChangeReason = LEVNT4, 204, 210 or 201 send ConDateOfBirth  else send Eepdateofbirth |
| TobaccoUse | Text - 35 |  | YES, NO, UNKNOWN | Hardcode  UNKNOWN |
| EmployeeType | Text - 35 |  | FTE, PTE, H1B, CONSULTANT, SABBATICAL,  PROBATIONARY, CONTINGENT,  TELECOMMUTING, INTERN, GROUPLEADER,  ASSOCIATE, PARTNER, UNKNOWN | Hardcode  UNKNOWN |
| EmployeePayrollType | Text - 35 |  | EXEMPT, NONEXEMPT, UNKNOWN | Hardcode  UNKNOWN |
| YearsOfService | Integer |  | Not used currently and only informational | Leave Blank |
| PremiumCouponType | Text - 35 |  | PREMIUMNOTICE, COUPONBOOK, NONE | Hardcode  COUPONBOOK |
| UsesHCTC | Boolean |  | True if this QB uses the Health Care Tax Credit (HCTC) system | Hardcode  FALSE |
| Active | Boolean |  | Should always be set to TRUE | Hardcode  TRUE |
| AllowMemberSSO | Boolean |  | Defaults to FALSE | Hardcode  FALSE |
| BenefitGroup | Text - 50 |  |  | Leave Blank |
| AccountStructure | Text - 50 |  |  | Leave Blank |
| ClientSpecificData | Text - 50 |  |  | Leave Blank |

### 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 |  | Include all where BchIsCOBRAQualifiedEvent = Y  If edhChangeReason = 204 or LEVNT4 send DIVORCELEGALSEPARATION  If EecEmplStatus = T and EecTermReason = 203 send DEATH  If edhChangeReason = 205 send MEDICARE  If edhChangeReason = 201 or LEVNT3 send INELIGIBLEDEPENDENT  If EecEmplStatus = T and EecTermReason <> 202 or 203 and eectermtype = V send TERMINATION  If edhChangeReason = 208 or EecEmplStatus = T and EecTermReason = 202 send RETIREMENT  If edhChangeReason = 203 or 202 send REDUCTIONINHOURSSTATUSCHANGE  If edhChangeReason = 206 REDUCTIONINHOURSENDOFLEAVE  If EecEmplStatus = T and eectermtype = I send INVOLUNTARYTERMINATION |
| 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 | | | If edhChangeReason = LEVNT4, 204, 210 or 201 send ConCOBRAStatusDate  else send eepDateOfCOBRAEvent |
| EnrollmentDate | Date |  | Original enrollment date of the member’s current medical plan - used for HIPAA certificate to show length of continuous coverage | | | most recent Eedbenstartdate or conbenstartdate |
| EmployeeSSN | SSN |  | The original employee’s SSN. Required if the  Event Type is a dependent type event, such as  DEATH, DIVORCELEGALSEPARATION, INELIGIBLEDEPENDENT or MEDICARE | | | Eepssn |
| 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 | | | Eepnamefirst space Eepnamelast |
| 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) | | | Leave Blank |
| 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. | | | Leave Blank |
| SecondEventAEISubsidyStartDate | Date |  | Optional. If IsSecondEventAEIEligible (above) is TRUE then set this to the appropriate Subsidy Start Date. | | | Leave Blank |

|  |  |
| --- | --- |
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### 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 | When EedDedCode = DEN or edhChangeReason = LEVNT4, 204, 210 or 201 and DbnDedCode = DEN send Cigna PPO Dental Plan  When EedDedCode = MED or edhChangeReason = LEVNT4, 204, 210 or 201 and DbnDedCode = MED send Cigna HMO Medical Plan  When EedDedCode = MEDP or edhChangeReason = LEVNT4, 204, 210 or 201 and DbnDedCode = MEDP send Cigna OAP Medical Plan  When EedDedCode = VIS or edhChangeReason = LEVNT4, 204, 210 or 201 and DbnDedCode = VIS send Cigna Vision Plan  When EedDedCode = FSA send Igoe FSA Plan |
| 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 | When EedDedCode = MED or MEDP and EedBenOption = EE send EE  When EedDedCode = MED or MEDP and EedBenOption = EES send EE+SPOUSE  When EedDedCode = MED or MEDP and EedBenOption = EEC send EE+CHILDREN  When EedDedCode = MED or MEDP and EedBenOption = EEF send EE+FAMILY  When EedDedCode = DEN and EedBenOption = EE send EE  When EedDedCode = DEN and EedBenOption = EES send EE+SPOUSE  When EedDedCode = DEN and EedBenOption = EEC send EE+CHILDREN  When EedDedCode = DEN and EedBenOption = EEF send EE+FAMILY  When EedDedCode = VIS and EedBenOption = EE send EE  When EedDedCode = VIS and EedBenOption = EES send EE+SPOUSE  When EedDedCode = VIS and EedBenOption = EEC send EE+CHILDREN  When EedDedCode = VIS and EedBenOption = EEF send EE+FAMILY  When EedDedCode = FSA and EedBenOption = EE send EE |
| NumberOfUnits | Integer |  | Sets the # of Units for this plan. Required if plan is Units Based (e.g. Life) | Leave Blank |

Example [QBPLANINITIAL] line:

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

### 8.8 [QBDEPENDENT] - If Applicable

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Column Name** | **Data Type** | **Required** | **Accepted Values** |  |
| SSN | SSN |  | Social Security Number | ConSSN |
| Relationship | Text – 35 |  | SPOUSE, CHILD, DOMESTICPARTNER | if ConRelationship = SPS, send SPOUSE  if ConRelationship = DP, send DOMESTICPARTNER  if ConRelationship = CHL, DPC or STC, send CHILD |
| Salutation | Text – 35 |  | MR, MRS, MS, MISS, DR | Leave Blank |
| FirstName | Text – 50 |  |  | ConNameFirst |
| MiddleInitial | Text – 1 |  |  | 1st digit of ConNameMiddle |
| LastName | Text – 50 |  |  | ConNameLast |
| Email | Email |  |  | Leave Blank |
| Phone | Phone |  |  | Leave Blank |
| Phone2 | Phone |  |  | Leave Blank |
| AddressSameAsQB | Boolean |  | Set to True if the Dependent’s address is the same as the QB’s address | If ConAddressIsDifferent = NO send TRUE  Else send False |
| Address1 | Text – 50 |  |  | If AddressSameAsQB = False send ConAddressLine1  Else Leave Blank |
| Address2 | Text – 50 |  |  | If AddressSameAsQB = False send ConAddressLine2  Else Leave Blank |
| City | Text – 50 |  |  | If AddressSameAsQB = False send ConAddressCity  Else Leave Blank |
| StateOrProvince | Text – 50 |  |  | If AddressSameAsQB = False send ConAddressState  Else Leave Blank |
| PostalCode | Text – 35 |  |  | If AddressSameAsQB = False send ConAddressZipCode  Else Leave Blank |
| Country | Text – 50 |  | Leave empty if the Dependent resides in the USA | Leave Blank |
| EnrollmentDate | Date |  | Original enrollment date of the dependent’s medical plan - used for HIPAA certificate | Leave Blank |
| 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) | If ConGender = M send M  If ConGender = F send F  Else send U |
| 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) | ConDateOfBirth |
| IsQMCSO | Boolean |  | True if the Dependent is under a Qualified Medical Child Support Order (QMCSO) | Hardcode  FALSE |

### 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 | | | | If DbnDedCode = DEN send Cigna PPO Dental Plan  If DbnDedCode = MED send send Cigna HMO Medical Plan  If DbnDedCode = MEDP send send Cigna OAP Medical Plan  If DbnDedCode = VIS send Cigna Vision Plan |
|  | | | |  |  |  |

**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 | Hardcode  CA-SRINSERT |

**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 | When EedDedCode = FSA send Igoe FSA Plan |
| Rate | Decimal |  | The amount of the member specific rate | EedEEGoalAmt  This value must be a Monthly Amount.  Can you divide the employees annual goal amount by 12 to get the monthly amount?  For example if the employees annual goal amount on the FSA deduction code is 2650.00 the monthly goal amount would be 220.83 |

## 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