COBRA & Direct Billing  
QB Import Specification

vision 2031

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# Introduction

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

# Scope

This document will explain the format and function of the import file used to import QBs into the COBRA & Direct Billing system. It is not written to fully explain the QB fields or define imports other than the QB import. This document defines import version 1.2.

# 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.

## Qualified Beneficiary (QB)

A QB is an individual that is eligible for COBRA benefits and needs to be entered into the 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.

## CSV – Comma Separated Values file

A CSV file is a text file that contains values on each row that are separated by commas.

**Note:**  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 the system.

## Import Version

Each import file should include a [VERSION] section that identifies the import version format the import file is adhering to.

If a [VERSION] record does not exist in the import file, an error will be generated.

The current version line should be: [VERSION],1.2

## Line Identifier

Each text line that is imported must have a line identifier as its first field, see Import File Process for more information. This line identifier defines which fields come next on the text line.

# Import File Process

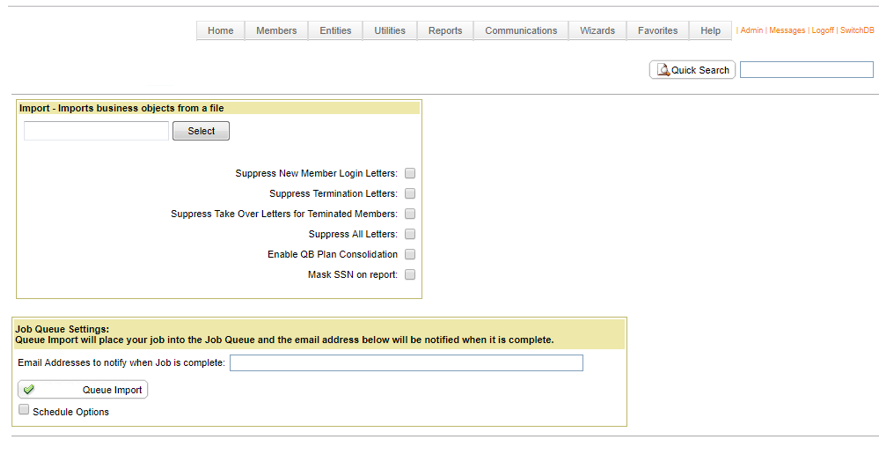
A CSV import file should be created that matches the specifications defined in this document.

**Note:**  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 the system.

The import file may be built with a simple text editor (such as Notepad) or generated from an export program written for an existing database.

To begin the import process:

1. Navigate to **Utilities > Administrator Utilities > Import** from the COBRA & Direct Billing Main Menu Bar within the TPA, Employer, or Employer Division Portal.
2. A page will be displayed allowing you to select a file. Browse to and locate your CSV import file on any of your local or network drives.
3. Click the **Import File** button.
4. The Import process will start by uploading your CSV file to the system. After the upload is complete, the system will begin scanning and importing the data contained in the import file.



1. After the file has been imported, a report will be displayed indicating the success or failure of the import file data. If an error occurs, it will be indicated using its line number along with a description of the error. The Import Totals section describes the total number of lines processed and the total number of errors encountered.

# Import File Layout

The Import file is a CSV file where each line has values separated by commas. To allow for the importation of different types of information, the first field of each line defines what type of information will follow for the fields of that line. For instance, to begin the importation of a QB record you will need a QB line that starts with a line identifier of “[QB]” and may appear similar to the following:

[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 then the import process begins for the new QB.

Line identifiers and their definitions are as follows:

|  |  |  |
| --- | --- | --- |
| Line Identifier | Required | Description |
| [QB] | X | The main QB record |
| [QBEVENT] | X | The QB’s qualifying event information |
| [QBPLANINITIAL] | X | 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. |
| [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. |

# 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, it is assumed that the import file 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 1.2 of the import.

# Import Line Identifiers (Section Definitions)

The line identifiers explained in the Import Version Label section each expect various fields to follow them on their respective line. The tables below define these fields for each of the line identifiers.

Required fields 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).

## [VERSION]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |  |
| VersionNumber | Integer | X | Use “1.2” for this import specification | 1.2 |

## [QB]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |  |
| ClientName | Text - 100 | X | The unique Client name assigned in COBRA & Direct Billing | UPG Enterprises LLC |
| ClientDivisionName | Text - 50 | X | The unique Client Division name assigned in COBRA & Direct Billing. If there are no Divisions, then use the ClientName. | eeclocation |
| Salutation | Text - 35 |  | MR, MRS, MS, MISS, DR |  |
| FirstName | Text - 50 | X |  | eepnamefirst |
| MiddleInitial | Text - 1 |  |  | 1st digit of eepnamemiddle |
| LastName | Text - 50 | X |  | eepnamelast |
| SSN | SSN | X | Social Security Number | eepssn |
| IndividualID | Text - 50 |  | Optional, used to store Employee ID #s or any other type of secondary identification | Eecempno |
| Email | Email |  |  | eepaddressemail |
| Phone | Phone |  |  | Leave blank |
| Phone2 | Phone |  |  | Leave blank |
| Address1 | Text - 50 | X |  | Eepaddressline1 |
| Address2 | Text - 50 |  |  | Eepaddressline2 |
| City | Text - 50 | X |  | Eepaddresscity |
| StateOrProvince | Text - 50 | X |  | Eepaddressstate |
| PostalCode | Text - 35 | X |  | Eepaddresszipcode |
| Country | Text - 50 |  | Leave blank if the QB resides in the USA | Leave blank |
| PremiumAddressSameAsPrimary | Boolean | X | Always set to TRUE | 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 | X | F, M, U | If edhChangeReason = 204, LEVNT4, 201, LEVNT3 or 210 send congenger else send eepgender |
| DOB | Date | X | Date of Birth – needed for age based plans and also for the Medicare Letter | If edhChangeReason = 204, LEVNT4, 201, LEVNT3 or 210 send condateofbirth else send eepdateofbirth |
| TobaccoUse | Text - 35 | X | YES, NO, UNKNOWN | Unknown |
| EmployeeType | Text - 35 | X | FTE, PTE, H1B, CONSULTANT, SABBATICAL, PROBATIONARY, CONTINGENT, TELECOMMUTING, INTERN, GROUPLEADER, ASSOCIATE, PARTNER, UNKNOWN | FTE |
| EmployeePayrollType | Text - 35 | X | EXEMPT, NONEXEMPT, UNKNOWN | Unknown |
| YearsOfService | Integer |  | Not used currently and only informational | Leave blank |
| PremiumCouponType | Text - 35 | X | PREMIUMNOTICE, COUPONBOOK, NONE | COUPONBOOK |
| UsesHCTC | Boolean | X | TRUE if this QB uses the Health Care Tax Credit (HCTC) system | Leave blank |
| Active | Boolean | X | Should always be set to TRUE | TRUE |
| AllowMemberSSO | Boolean | X | TRUE or FALSE | FALSE |
| BenefitGroup | Text - 50 |  |  | Leave blank |
| AccountStructure | Text - 50 |  |  | Leave blank |
| ClientSpecificData | Text - 50 |  |  | Leave blank |
| SSOIdentifier | Text - 50 |  |  | Leave blank |
| PlanCategory | Text |  | Separate multiple entries with a comma (each individual entry cannot exceed 100 characters). Angle Brackets “< >” are not permitted. | Leave blank |

## [QBEVENT]

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 | X | DIVORCELEGASSEPARATION  DEATH  INELIGIBLEDEPENDENT  MEDICARE  TERMINATION  RETIREMENT  REDUCTIONINHOURS-STATUSCHANGE  REDUCTIONINFORCE  BANKRUPTCY  STATECONTINUATION  LOSSOFELIGIBILITY  REDUCTIONINHOURS-ENDOFLEAVE  WORKSTOPPAGE  USERRA-TERMINATION  USERRA-REDUCTIONINHOURS  INVOLUNTARYTERMINATION  TERMINATIONWITHSEVERANCE  RETIREEBANKRUPTCY | If edhChangeReason = 204 or LEVNT4 send DIVORCELEGALSEPARATION  If EecEmplStatus = T and EecTermReason = 203 or edhChangeReason = 210 send DEATH  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 = 202, 203 or send REDUCTIONINHOURSSTATUSCHANGE  If edhChangeReason = 206 REDUCTIONINHOURSENDOFLEAVE  If EecEmplStatus = T and EecTermReason <> 202 or 203 and eectermtype = I send INVOLUNTARYTERMINATION |
| 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 = 204, LEVNT4, 201, LEVNT3 or 210 send EedDatetimeChanged else send eepDateOfCOBRAEvent |
| EnrollmentDate | Date | X | Original enrollment date of the member’s current medical plan - used for HIPAA certificate to show length of continuous coverage | Eedbenstartdate or conbenstartdate |
| EmployeeSSN | SSN | X | 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 | X | The original employee’s name. Required if the event type is a dependent type event, such as DEATH, DIVORCELEGALSEPARATION, INELIGIBLEDEPENDENT or MEDICARE. | eepnamefirst |
| SecondEventOriginalFDOC | Date | X | DEPRECATED – any value will be ignored | Leave blank |

## [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 First Day of COBRA (FDOC) through Last Day of COBRA (LDOC). QBPLANINITIAL is not intended for use with Legacy QBs ([QBLEGACY] lines), for Legacy QBs please use the QBPLAN line instead.

Example [QBPLANINITIAL] line:

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

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |  |
| PlanName | Text – 50 | X | The unique Client plan name | If eeddedcode = DEN send Dental  If eeddedcode = MDHMO or NMHMO send EPO Plan  If eeddedcode = MDPPO send Gold PPO Plan  If eeddedcode = MHDHP  send HSA Plan  If eeddedcode = VIS send Vision |
| CoverageLevel | Text – 35 | X | EE,  EE+SPOUSE,  EE+CHILDREN, EE+FAMILY,  EE+1,  EE+2,  EE+1Child,  EE+2Children, EE+3Children, EE+4Children, EE+5orMoreChildren | (Over age dep, Divorce or Death) -  If edhChangeReason = 201, LEVNT3, 204, 210 or LEVNT4 and  If bdmrelationship = SPS and 1 'CHL,DCH,DPC,STC' send EE+1CHILD  If bdmrelationship = SPS and more than 1 'CHL,DCH,DPC,STC' send EE+CHILDREN  If bdmrelationship = more than 1 'CHL,DCH,DPC,STC' send EE+CHILDREN  else send EE  else  If edhChangeReason <> 201, 302, LEVNT3, 204, 210 or LEVNT4 and eedbenoption = EE  send EE  if eedbenoption = EEC  send EE+CHILDREN  if eedbenoption = EEF  send EE+FAMILY  if eedbenoption = EES  send EE+SPOUSE  if eedbenoption = EEP1  send EE+1  if eedbenoption = EEP2  send EE+2  if eedbenoption = EEP3  send EE+3  if eedbenoption = EEP4  send EE+4  if eedbenoption = EEP5  send EE+5  if eedbenoption = EEP6  send EE+6  if eedbenoption = EEP7  send EE+7  if eedbenoption = EEP8  send EE+8  if eedbenoption = EEP9 send EE+9  if eedbenoption = EEP10 send EE+10 |
| NumberOfUnit | Decimal |  | Sets the # of units for this plan. Required if plan is units based (e.g. Life). | Leave blank |

## [QBDEPENDENT]

If applicable

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |  |
| SSN | SSN |  | Social Security Number | conssn |
| Relationship | Text – 35 | X | SPOUSE, CHILD, DOMESTICPARTNER | if conrelationship = 'CHL,DCH,DPC,STC' send CHILD  if conrelationship = SPS send SPOUSE  if conrelationship = DP send DOMESTICPARTNER |
| Salutation | Text – 35 |  | MR, MRS, MS, MISS, DR | Leave blank |
| FirstName | Text – 50 | X |  | connamefirst |
| MiddleInitial | Text – 1 |  |  | 1st digit of connamemiddle |
| LastName | Text – 50 | X |  | connamelast |
| Email | Email |  |  | Leave blank |
| Phone | Phone |  |  | Leave blank |
| Phone2 | Phone |  |  | Leave blank |
| AddressSameAsQB | Boolean | X | Set to TRUE if the dependent’s address is the same as the QB’s address | True |
| Address1 | Text – 50 |  |  | Leave blank |
| Address2 | Text – 50 |  |  | Leave blank |
| City | Text – 50 |  |  | Leave blank |
| StateOrProvince | Text – 50 |  |  | Leave blank |
| PostalCode | Text – 35 |  |  | 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 |  | F, M, U (this is required if the dependent is on a sex based plan that sets rates based on the dependent’s sex) | congender |
| 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) | False |

## [QBDEPENDENTPLANINITIAL]

The [QBDEPENDENTPLANINITIAL] record type enters a QB dependent initially on a plan. It assumes that the dependent is on the plan from First Day of COBRA (FDOC) through Last Day of COBRA (LDOC).

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 | Test – 50 | X | The unique Client plan name | If eeddedcode = DEN send Dental  If eeddedcode = MDHMO or NMHMO send EPO Plan  If eeddedcode = MDPPO send Gold PPO Plan  If eeddedcode = MHDHP  send HSA Plan  If eeddedcode = VIS send Vision |

# Data Types

The data types used in the various import sections are defined below.

**Note:**  The fields in the import file are all text fields (since the file is CSV format). The following definitions explain the formatting of the text in the corresponding 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 (“). If you need a double quote to be represented in the text then the double quote (“) must be escaped with a back slash (\”). To get the text - My “Cool” Company – you would represent it like this – My \”Cool\” Company - this escape character works inside other double quotes as well, for example “My “other” Company” would be represented by “My \”other\” Company”. |
| 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 F = Female, M = Male, U = Undisclosed. |
| Phone | Format as 10 digits. |
| Email | Text – 100, with at least one “@” and at least one “.” after the @. |
| UserName | Text – 50. 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 always have at least one digit to the left of the period and up to 4 digits to the right of the period. Example: 0.1234 |

# Sample Import File

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

[VERSION], 1.2

[QB],Bob's Trucking, Bob's Trucking,MR,Ronald,,McDonnald,655-24-9052,,,7488872482,,1909 Reidsview Dr,,White Lake,MI,48383,,Y,,,,,,,MALE,7/27/1959,UNKNOWN,UNKNOWN,UNKNOWN,0,NONE,N

[QBEVENT],TERMINATION,8/12/2007,2/1/2006,,,2/1/2006

[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