GUIDE TO ENTERING QUALIFIED BENEFICIARIES AND NEW PLAN MEMBERS

Aptia365

Guide to Entering Qualified Beneficiaries and New Plan Members, continued

Entering a New Plan Member (NPM) — An NPM is a new hire at your company or current employee who is newly enrolled in COBRA eligible benefits

Step 1: In LEAP, click "COBRA Administration" in the toolbar on the left side.

Step 2: From the homepage, click "Members," then click "Add Member."

Step 3: Under New Hire, click "Next" to begin the member add process.
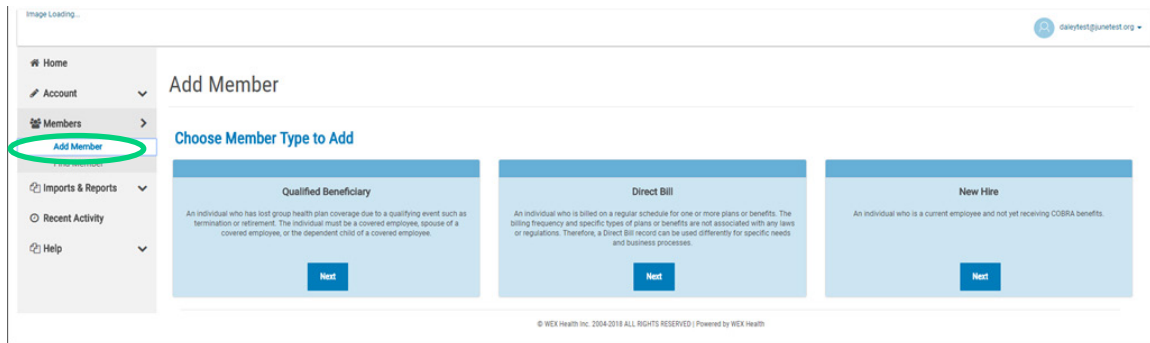
Step 4: If prompted, select a division to add the member under (in the Employer Header section).

Step 5: Complete the remaining appropriate fields on the Enter Profile Information page. Required fields are marked.

A few things to note:

- **Has Waived All Coverage:** Uncheck this box, unless the member has refused coverage.
- **Send General Rights Letter When Finished:** Check this box to automatically send the letter on the next business day after the member has been entered. This field is checked by default.
- **Use "& Family" Addressing for Mailings:** Select to address mailings to the member "and family." Uncheck this box if the member is enrolling in "employee only" or single coverage.
- **Do You Want to Enter HIPAA Certification Information?:** Select to add the member's HIPAA certifications.

Step 6: Click "Add Member" to save.

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Entering a new Qualified Beneficiary (QB)

Before you begin this process, keep in mind:

- You must have all required information for the member before you can begin. You must complete all required fields accurately, because you can't make updates after you exit.
- If you have chosen a coverage level other than "Employee Only" for a member's plan, you need to enter at least one dependent on the plan.
- To add a dependent, you must have the social security number (SSN), gender and date of birth for each dependent.

Step 1: In LEAP, click "COBRA Administration" in the toolbar on the left side.

Step 2: From the homepage, click "Members" and select "Add Member." Under Qualified Beneficiary, click "Next."

Step 3: If prompted, select a division to add the member under (in the Employer Header name).

Step 4: You'll be taken to the Enter Profile Information and Enter Employee Information pages. Enter the member's information. Required fields are marked. Click "Next" when finished. Please note:

- If a field is automatically populated, please leave the field as is.
- If a member is already enrolled in COBRA and you're transitioning them to Aptia, select "Yes" when asked if the member has already been offered COBRA. Additional fields will be displayed for you to complete.
- For the Specific Rights Notice (SRN) processed date, you can use a default of 10 days after the qualifying event date.
- If you're unsure of the "election form postmark date," you can use a default of 20 days after the qualifying event date.
- For the Next Premium Owed field, enter the date Aptia will begin collecting monthly premiums from the member.

Step 5: Click "Save & Continue" to continue to the next page.

Step 6: You'll be brought to the Plan page. Click "Add a Plan." Enter information in the appropriate fields. Required fields are marked. Once finished, click "Save" to submit the plan. Please note:
- **Plan or Bundle:** Select Plan if your plan isn't bundled with other plans.
- **Plan:** Select the applicable plan that the member was enrolled in while on active benefits.
- **Coverage Level:** Select the applicable coverage level that the member was enrolled in while on active benefits.
- **First Day of Coverage:** Verify that the field was auto-populated. This date is generated based on the billing start date you entered previously and is determined by federal regulations.
- **Add Rate:** If a plan has member-specific rates, you must enter the rates for the member. Click "Add Rate." Then, for Start Date, enter the date Aptia will begin collecting premiums from the member. Enter the rate amount without the 2% administrative fee and click "Add," then click "Save."

Step 7: Repeat the previous steps for all plans applicable to the member. Click "Next" when finished.

Step 7: You'll be brought to the Dependents tab. If the qualified beneficiary has dependents enrolled in any plans, follow the steps below. If not, click "Next."

> **Step 7a:** To add a dependent, click "Add a Dependent."
> **Step 7b:** For the Start Date field, enter the date when Aptia will begin collecting premiums from the member.
> **Step 7c:** In the Available Dependent Plans section, click "Add Plan" to add the dependent to a plan.
> **Step 7d:** Repeat this process for all dependents. Plans for the dependent are listed in the Added Dependent Plans section. Then, click "Save & Continue."

Step 8: You'll be brought to the Subsidies page. A subsidy should only be added if the company is paying for part or all of a participant's premiums. If there are no subsidies to apply, click "Save & Continue" to skip this step. To add a subsidy, follow the steps below.

> **Step 8a:** Click "Add Subsidy Schedule" and enter subsidy information. Required fields are marked.
> **Step 8b:** Click "OK" to submit.

Step 9: You'll be taken to the Letter Insert page. Click "Save & Continue."

Step 10: You'll then go to the Letter Attachments page. Click "Add Member" to save the member account.

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Convert a New Hire Into a Qualified Beneficiary
With a few simple steps, you can easily report a new hire as a qualified beneficiary without having to manually re-enter the member's information.
Step 1: In LEAP, click "COBRA Administration" in the toolbar on the left side.
Step 2: From the homepage, click "Members" and select "Find Member." Click the member's name to view their account.
Step 3: In the toolbar, under Members and Individual Member, select "Actions."
Step 4: Click "Clone New Hire to Qualified Beneficiary."
Step 5: Verify that all information for the member is accurate. Click "Next" to continue through each page. Click "Add Member" to submit.