

COBRA

Quick Start Guide

Welcome to Infinisource!

Your account setup process for the COBRA Administration/Premium Collection service has been completed.

Your user ID and password for accessing the Infinisource COBRA Online Portal will be sent by our system in a separate email. The email will be from support@infinisource.com (please do not reply to this email). ***If your account effective date is in the future, you will be unable to log in to your account online until your effective date.***

This portal gives you anytime access to view information, manage your profile, provide COBRA information and download reports.

It enables you to:

- Enter a new enrollee
- Enter a qualifying event
- Review a Qualified Beneficiary's information including notices and payments received
- Download Infinisource reports
- Process reports
- Review/change profile information
- Review/update plans and rates

INFINISOURCE
BENEFIT SERVICES

COBRA Sign in

Login

To login to your home page, follow these steps:

1. Navigate to the [Infinisource login page](#).
2. Enter your Login/Email and Password. First time users will enter your assigned User ID (Login) and Password.

Please, update your security settings

Submit

Login Information

Email:

Your Email will be used as your user name in time of login into Client Web Site and for password restoration. Please use a valid email address.

Password:

Password should contain one letter, one digit, one special symbol and be at least 8 characters

Confirm Password:

Password Hint:

It is a remainder or an idea to remember (recover) password

Recovery Information

Security Question:

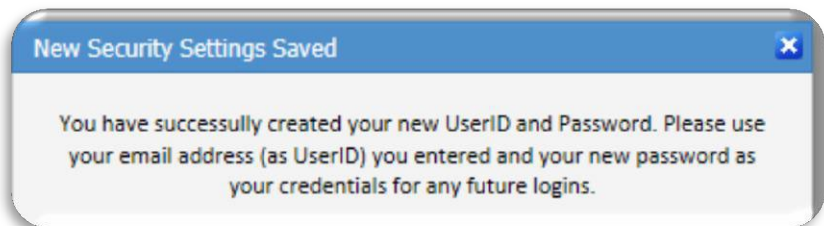
Answer:

New users will be prompted to update security settings by entering email address, new password (must contain one letter, one digit, one special symbol and be at least 8 characters) and recovery information.

Note: Unique user IDs and passwords should be generated for each COBRA online user. Our online system stamps all transactions with date, time and user information. Access to online features is also governed through role-based security features. Multiple users are supported. To add users, contact your Account Manager or Customer Service at 866-320-3040.

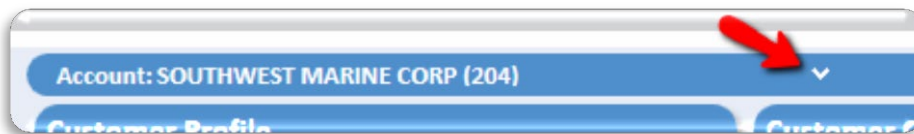
You will be asked to change your password every 90 days for security purposes.

New users will receive a prompt once all their new security settings have been saved.



COBRA Online Home Page

The online portal contains many features to assist you with reporting information to Infinisource along with reviewing data already submitted and checking on the status of a COBRA participant.



If you report for multiple accounts, you will select your account here.

Reports – Online Reports

Allows you to process a report on demand and review now or deliver to your Download Center. Reports include notices mailed, Participant Status report, events and enrollments entered and plans/rates.

The screenshot shows the 'Online Reports' interface. On the left, there are sections for 'Date Range' (with start and end date dropdowns and 'Generate'/'Clear' buttons), 'Events \ Enrollments Entered' (with a table of report names, formats, and generate/download options), and 'Specialized Reports' (with a similar table). On the right, the 'Other Reports' section contains a table listing various reports like 'ARRA Notices Mailed', 'Client Conversion Notices', etc., with columns for 'Format', 'Generate Now', and 'Download Center'.

Infinisource Reports – Download Center:

For security purposes, your reports are available through our secure website or via fax. If receiving reports through our secure website, Infinisource will send you an email when there is a report available for download. The email will come from reports@infinisource.com.

In the Download Center, you can search for reports three ways by clicking in the applicable circle:

- My Files: Reports addressed to you, including those you have already downloaded
- Account Files: All reports to all recipients
- My Files that have not been downloaded yet
- Copy of Carrier Reports

The screenshot shows the 'Search Criteria' form. It includes 'Start Date' (11/26/2015) and 'End Date' (12/10/2015) dropdowns. Below these are four radio button options: 'My Files', 'Copy of Carrier Reports', 'Account Files', and 'My Files that have not been downloaded yet' (which is selected).

Your search results will be returned here.

Click **View** to open your report. Reports can be saved to your local computer or network in PDF or Microsoft Excel formats.

The screenshot shows the search results table. The columns are: Generated, Account, Type, File Size, Downloaded, Description, and View. The table contains several rows of report data, including 'COBRA Notices Mailed for: 9A0160E' and 'Premium Payment Summary Report for: Caddo Parish School Board'.

Generated	Account	Type	File Size	Downloaded	Description	View
12/5/2018	O'CONNELL'S PRESSURE ACCOUNTING	REPORT	135.7kb	12/7/2018	COBRA Notices Mailed for: 9A0160E.	View
12/5/2018	O'CONNELL'S PRESSURE ACCOUNTING	REPORT	135.7kb		COBRA Notices Mailed for: 9A0160E.	View
12/4/2018	O'CONNELL'S PRESSURE ACCOUNTING	REPORT	60.5kb	12/7/2018	Premium Payment Summary Report for: Caddo Parish School Board.	View
12/4/2018	O'CONNELL'S PRESSURE ACCOUNTING	REPORT	60.0kb		Premium Payment Summary Report for: Caddo Parish School Board.	View
12/3/2018	O'CONNELL'S PRESSURE ACCOUNTING	REPORT	60.5kb		Premium Payment Summary Report for: Caddo Parish School Board.	View
12/1/2018	O'CONNELL'S PRESSURE ACCOUNTING	REPORT	235.2kb		Participant Status Report for: 9A0160E.	View

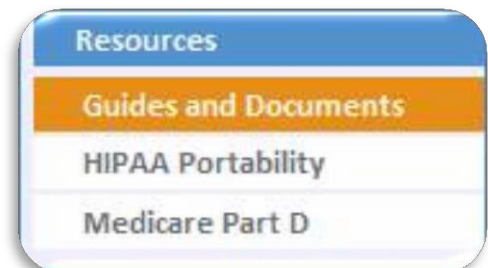
To locate files that have already been downloaded, select Account Files. This search provides you with an archive of your reports.

Important: Please be sure to audit all reports that Infinisource sends to you. This will ensure that individuals have been reinstated/removed from the coverages in a timely manner. Please make sure to audit the Participant Status report that Infinisource generates on a monthly basis. Please audit this report against your carrier bill and if there are any discrepancies, contact Infinisource right away. Also, if you would like to receive the report twice a month to aid you in auditing your carrier billing, please contact the Customer Response Department and they will be happy to assist you with implementing the additional report.

Guides and Documents

The following information is available under the *Resources-Guides and Documents* section of the online account.

- Report Guide – Contains a description of the reports you will receive from Infinisource if you have our Premium Collection Service and how to interpret them
- COBRA Online Guide – A Guide to using the online service
- Online Training – An audio and visual training for the online service



Other Support and Resources

Customer Communications

Infinisource provides our customers with important information about compliance issues, legislative updates and enhancements to our services via email. These updates are also available for review from the COBRA Online Portal. You can view any communication clicking on the link **COBRA Communications** on the left-hand side of any COBRA Online page, under Resources.

Customer Service

Infinisource has COBRA experts on staff to help you understand our online system features. You can call 866-320-3040, Monday through Thursday 8 a.m.-8 p.m., ET and Friday 8 a.m.-6 p.m., ET.