Information Needed for COBRA Implementation

Company Information

- ☐ Company Address/Contact Information
  - o If the Company mailing address differs from that used for Remittance or Invoices, that additional mailing address information will be needed
- ☐ Company Federal Tax ID (EIN)
- ☐ Whether the Client or Risk Strategies will be billed for COBRA services
- ☐ Name and Contact information for individual who will be signing the Business Associate Agreement Contract for the client
- ☐ Whether the Client will be using EaseCentral
- ☐ Main HR and Finance Contact information
  - o If the Main Contacts listed are not the Contacts for Remittance or Invoices, that additional contact information will be needed
- ☐ Approximate number of total employees, active covered employees, and COBRA participants

Plan Information

- ☐ Number of Medical Plans for each COBRA-eligible benefit
- ☐ Whether the Client reinstates when COBRA is elected, or when the first COBRA payment is made
- ☐ Whether BASIC NEO will send Initial Notices to all active covered employees at initial setup
- ☐ Whether BASIC NEO will send Open Enrollment materials to each COBRA participant and qualified beneficiary
- ☐ Whether BASIC NEO will notify Health Plan Carriers directly for COBRA reinstatement and terminations
- ☐ Whether COBRA remittance will be handled via Check or ACH
  - o If handled via ACH, will need a completed COBRA ACH Form
- ☐ Whether the client offers a Health FSA and/or HRA
- ☐ Completed Benefit Import Spreadsheet
- ☐ Completed COBRA Census File Template (can be uploaded at a later date – not required to complete New Client Submission Form