How to update COBRA Qualified Beneficiary subsidy status for the American Rescue Plan Act (ARP)

We have these tools available to assist you in identifying individuals who may eligible for the subsidy and updating their AEI status in the ProBenefits COBRA portal:

1. QB AEI 2021 Report: The QB AEI 2021 Report is used to identify all qualified beneficiaries that can potentially be included in the ARP 2021 subsidies.
2. AEI 2021 Status Update utility: The AEI 2021 Status Update utility is used to upload updated AEI status for COBRA QBs by import.
3. Manually Update Member Record: To quickly update AEI status for a few individuals, it's very easy to update the AEI 2021 Status in the member record on the portal.

In addition to the step-by-step instructions below, we also have a video illustrating how to run the QB AEI 2021 Report and use the AEI 2021 Status Update Utility in the ProBenefits COBRA Employer Portal: https://youtu.be/l4Li8ZbpBXw.

To update AEI statuses for participants who are eligible for the subsidy through ARPA, first you will need to run a QB AEI 2021 Report.

How to run and review a QB AEI 2021 Report

*   Log in to the ProBenefits COBRA Employer Portal at https://cpb.probenefits.com and choose Standard Reports from the Imports & Reports menu in the left navigation panel.
*   Choose the report type QB AEI 2021 Report.
*   Enter an email address to be notified when the report is complete and ready to be retrieved from the Job Queue and click the Run Report button.
*   The completed report will be available in your Job Queue (accessible from the Imports & Reports menu in the left navigation panel).
*   Open the report and review the AEI 2021 Status for each individual listed. On the initial report, QBs who were submitted with event types of Reduction in Force, Reduction in Hours, Work Stoppage, or Involuntary Termination will be listed as Eligible; individuals with all other event types will be listed as Unknown.
*   Review each QB listed as Eligible to be sure that is correct, and determine whether each Unknown individual is eligible or ineligible for AEI status. Only individuals listed as Eligible in the system will receive the required subsidy notices.

Updating the AEI 2021 Status

There are two ways to update the AEI 2021 Status for an individual:

Use the AEI 2021 Status Update Utility

- In the QB AEI 2021 Report file, update the column AEI 2021 Status to indicate if the qualified beneficiary is eligible for the COBRA subsidy provision by entering one of these two statuses:
  - Eligible
  - Ineligible
- Important: Make no other changes to the report outside of this field.
- Once complete, save the file in CSV format.
- In the ProBenefits COBRA employer portal (https://cpb.probenefits.com), under Imports & Reports, select AEI 2021 Status Update.
- Select the saved CSV file for the QB AEI 2021 Report on your computer.
- Enter the email address where you would like to be notified when the status update is complete.
- Click the Run Status Update button.
- You'll be able to see the progress of the status update on your Job Queue page.

Manually Update Member Record

- Log in to the ProBenefits COBRA Employer Portal (https://cpb.probenefits.com).
- Choose Find Member in the Members menu on the left navigation panel.
- Enter the QB's demographic info and click the Find Member button.
- Select the member's Qualified Beneficiary record.
- Under Event Information, find the AEI 2021 Status and click Edit.
- Change status to Eligible or Ineligible and click the Update button.

Once you have made the necessary updates, either manually on the member record or by uploading a completed report, we recommend that you run the QB AEI 2021 Report once more to be sure you have updated all statuses as needed. Please make all necessary AEI status updates by May 7th, 2021, to ensure that required notices may be postmarked by May 31st, 2021.

Adding AEI data for an individual who was offered COBRA by an entity other than ProBenefits (Legacy QB)

If there are other QBs who should be marked as AEIs but are missing from our system (such as individuals who were offered COBRA by an entity other than ProBenefits), please add them as Legacy QBs on the portal and then mark them as AEI eligible by May 7th.

- Log in to the ProBenefits COBRA Employer Portal (https://cpb.probenefits.com).
- Choose Add Member in the Members menu on the left navigation panel.
- Choose Qualified Beneficiary as the member type to add and click the Next button.
- Enter the required QB profile information and click the Next button.
- Enter the required employee information on the next screen. At the bottom of this screen, for the question "Has this member already been offered COBRA?" select Yes.

- Complete the rest of the required information.
  - If you do not know the exact date the original Specific Rights Notice was printed, enter the date of the loss of coverage.
  - Legacy QB can be used for a QB that did not elect coverage or a QB that elected and then dropped coverage prior to ProBenefits' administration. So for "Has this member elected?" and "Next Premium Owed," choose the correct information (the first month owed if they did not elect, and the first month after they dropped coverage if they did elect and dropped).
  - Click the Save & Continue button.
- Click Add Plan to assign the plan under which the employee was covered at the time of loss of coverage.
  - Be sure not to change the First Day of Coverage, as it will incorrectly extend the QB's COBRA eligibility.
  - Click Save and continue to add plans as necessary, then click Save & Continue.
- Add dependents as necessary, then click Save & Continue.
- You do not need to add the ARP subsidy – it will be added automatically if the QB elects subsidized coverage. Click the Save & Continue button.
- Click Save & Continue on the Letter Inserts screen.
- On the Letter Attachments screen, click the Add Member button.
- You will receive a message stating that the QB has been successfully added.
- Now, follow the instructions above for "Manually Update Member Record" to mark the newly added Legacy QB's AEI 2021 Status as Eligible.