



d. When the letter outputs it uses several /statements to complete information on individual participants. Note that the 4 /statements used in the letter are:

1. /Address - outputs the participant address.
2. /Coverages - outputs the current coverage of the participant.
3. /Dependents - outputs covered dependents
4. /Contact - outputs name and address of contact person.

COBRA EAS open enrollment letter 1000 as it outputs.

Additional information can be inserted in your letter using embedded fields or by simply typing it.

There is no limit to the number of pages. You can expand the sample letter to any length.

**MR CHRIS BACON & FAMILY**  
800 OAKLY LANE ST  
NORFOLK VT 99999

**OPEN ENROLLMENT NOTICE**

As a continuation coverage participant, you are eligible to participate in an annual open enrollment. In order to take advantage of this opportunity you must respond on a timely basis.

A complete description of all the choices available is enclosed. Carefully review the benefits and costs of each plan. You should consider your choice carefully because you will not have another opportunity to change your coverage until 01/01/2010.

If you do want to make a coverage change you must complete the appropriate enrollment form for the new plan and return it to the person designated below before 12/15/2008. Any changes in coverage will become effective on 01/01/2009. If you do make a change please be sure to obtain new claim forms for use on or after the effective date.

**Remember, your new enrollment form must be received before 12/15/2008 to be accepted for coverage.**

You currently have the following active coverages on file:

<u>Carrier Name</u>	<u>Description</u>	<u>Eligible Dates</u>	<u>Amount Due</u>
Aetna U.S. Healthcare	Employee plus 1	06/01/2008-11/30/2009	153.00
Vision Service Plan Insurance	Employee Only	06/01/2008-11/30/2009	10.20

Each of the following person(s) currently have continuation coverage:

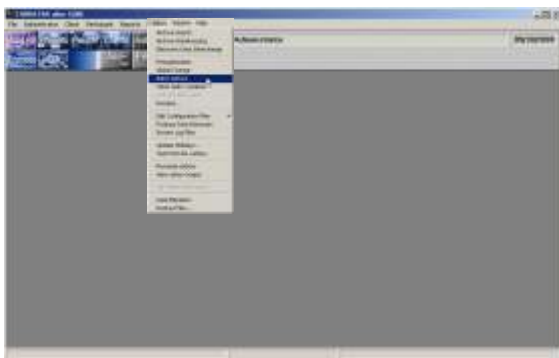
<u>Name (Last, First)</u>	<u>Relationship</u>	<u>Birth Date</u>
Bacon, Ashley	Spouse	07/01/1985

If you have any questions, please contact:

Pacific Administration  
123 W Coast Drive  
Irvine CA 92618  
800-555-1212

## Step 2 - Select Who The Letter Should Go To

a. Select Batch Letters from the Utility Menu drop down.



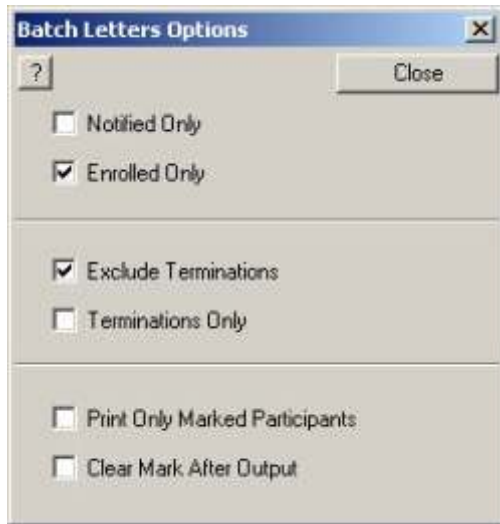
b. The following selections are available:

- Letter: Select open enrollment letter 1000 from the drop down list.
- Client: Select one or leave blank for all.

- Division: Select one division or leave blank for all.
- Coverage: Select 1 coverage or leave blank for all.
- Qualification Code: Select 1 or leave blank for all.
- Category: Select 1 or leave blank for all.
- Status: Select from the drop down.
- Dates: Select from/to dates or leave blank for all.
- System Note: Choose to add a system note, such as, "OE letter 1000 sent."



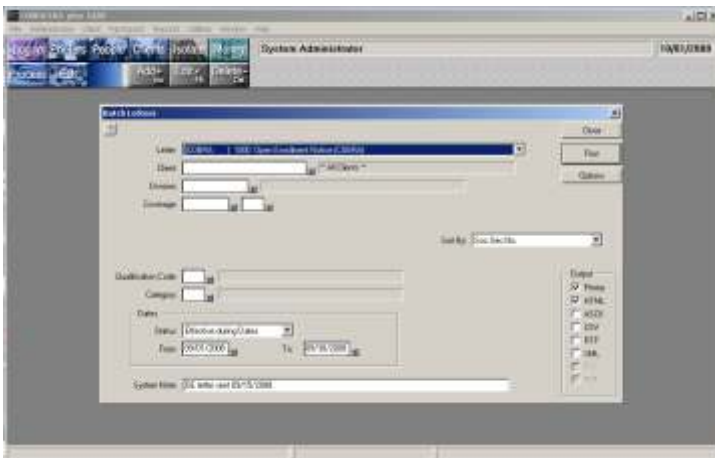
c. Click on the OPTIONS button for more choices.



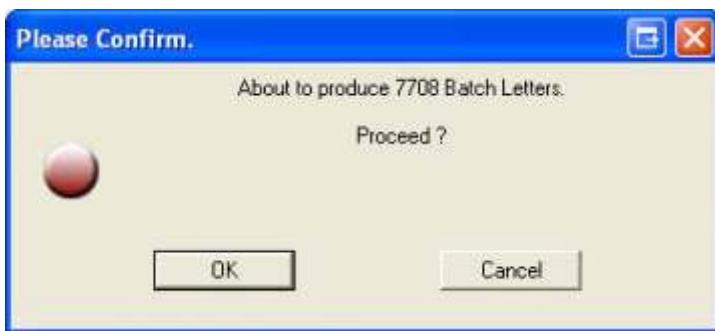
Click on the CLOSE button when done.

### Step 3 - Output The Letters

To output the letters select Printer and/or HTML, then click on the RUN button.



Click OK at the confirm message to start output.



The open enrollment letters print, ready for mailing. Use window envelopes if available.

## Adding Renewal Rates

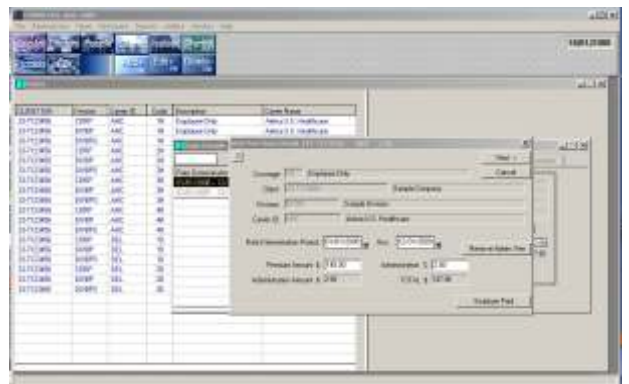
When you add renewal rates you must do so using the Add function to keep your rates properly sequenced. The example below shows you how to add a new rate determination period whether or not there is a change in amount for an existing rate.

### Step 1 - Add A New Rate Detail Period

- Open the Client browse, then select RATES from the Right Button Menu.
- Highlight the rate that you want to change, then click on the RATE DETAIL tab.
- Right click in the RATE DETAIL browse, then select ADD from the menu.



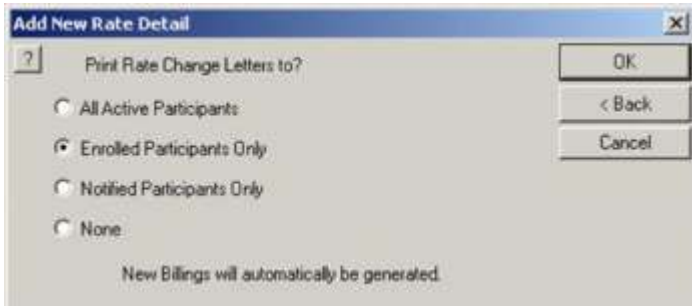
- Note that the Rate Determination Period automatically defaults to the next available 12 month from and to period. If it is correct enter the new rate amount. You must enter the rate amount even when there is no change. Click on the NEXT button.



- Select groups of participants for rate change notices and new billings. See page 4 for details.



f. Select one of the following participant current status choices for Rate Change Letters.

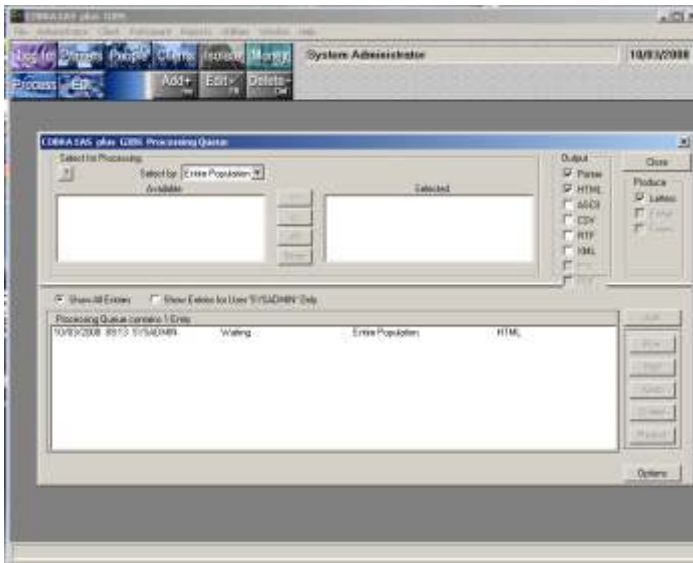


c. To Add a dependent, point to the participant in the browse, then select dependents from the Right Button Menu. When the dependent browse displays choose Add from the Right Button Menu, then Add the dependent. Be sure to enter the correct coverage effective date for the new dependent.



Note that new billings will automatically output when you run the next full process - Entire Population or by Client. Billings will not output when the process is run for one person.

### Step 2 - Run A Full Process

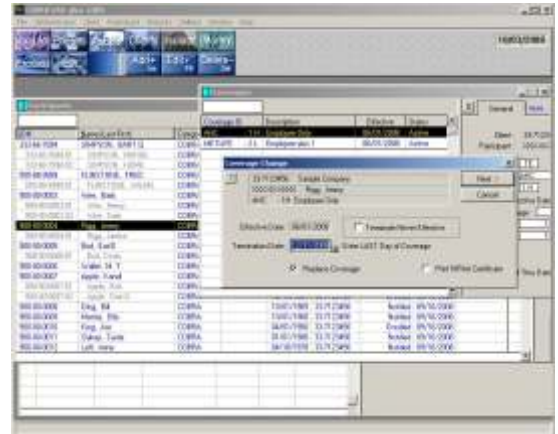


### Add Or Terminate Coverage

You can add or terminate coverage on an individual basis or, in the case where a carrier change is made, using a batch process.

a. To change coverage on an individual basis, point to the participant, then select COVERAGE from the Right Button Menu. Point to the coverage that you want to change and select CHANGE from the Right Button Menu.

For instructions on using the batch process see the Help System topic Global Change in the Utilities section.

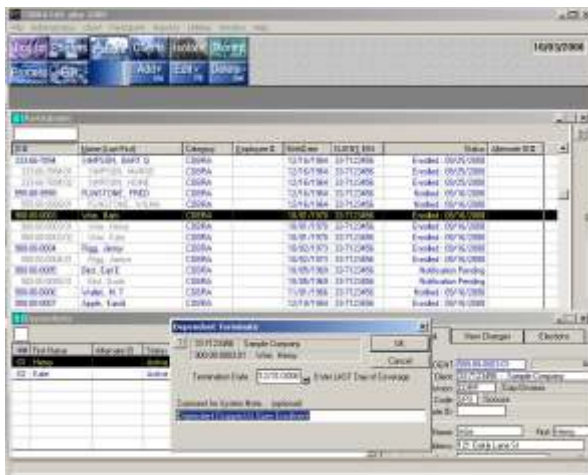


### Add Or Terminate Dependents

After participants return your change forms you will need to enter or import any coverage changes into the system. The most common types of changes will be dropping or adding dependents and a change in coverage.

a. To drop dependents point to the dependent in the participant browse, then select TERMINATE from the right button menu.

b. Enter the correct coverage termination date. You may want to add a note like "Dependent dropped during open enrollment".



b. Enter the correct coverage end date. If you intend to replace the coverage make sure that you have checked the Replace Coverage Checkbox. If you want to output a Creditable Period Of Coverage Certificate you must also check the box at the lower right. Click NEXT.

c. If you checked the Replace Coverage Checkbox on the previous screen the Add Coverage Screen shown below will display. Select the replacement coverage from the drop down, then click the FINISH button.

