

## Introduction

When an employee has a reduction in hours or a change in employment category that results in a loss of his/her coverage for one or more COBRA eligible benefit plans, he/she experiences a COBRA Qualifying Event. The following steps are the Best Practice for ensuring that the Qualifying Event data are transmitted to the Infinisource COBRA Event System.

**NOTE:** Qualifying Events are not queued in the Task Manager; they can only be entered after the event has actually taken place.

### ‘Change in Employment Category’ Life Event

On the Employee Management>Employee Maintenance> Employment screen, ADD NEW Employment Category record for the employee, marking the **“Create ‘Change in Employment Category’ Life Event Record”** checkbox.

**NOTE:** Do not edit the existing record, but create a new one.

The Effective Date should be the date on which his/her employment category changed.

When this is completed, the employee will have a new employment category record on the Employee Management>Employee Maintenance>Employment screen and a new life event record on the Employee Self Service>Life Events History screen.

Employment		
Employment: Employed From 8/10/1966 to Current <span style="float: right;">Filter</span>		
Effective Date	Employment Category	Statutory
8/10/1966	Full Time	
4/30/2015	FMLA Exhausted	

Life Events
Event
New Hire
Employment Category Change

## Triggering the Qualifying Event Sync to COBRA

Use the Benefit Evaluation Utility (Employee Management>Employee Management Tools>Benefit Evaluation Utility) to identify employees who are no longer eligible for the benefit plans in which they are enrolled – including the employee having the recent change in employment category.

To process a COBRA Life Event, you will select the “employee loss of eligibility for a benefit plan” to identify which plans the employee(s) will be offered COBRA for.

### Benefit Evaluation Utility

→ Next

The Benefit Evaluation Utility has several evaluation processes. Select the evaluation process(es) you would like to run and click 'Next' to begin. The evaluation process may take several minutes. Do NOT leave this window or close your browser while the evaluation is in process.

**Employee Benefit Eligibility Evaluation**

Existing employees eligible for a benefit plan with no plan election

New hires eligible for a benefit plan from  to

**Employee Loss of Eligibility Evaluation**

Employee loss of eligibility for a benefit plan

Employee loss of eligibility for a coverage code

Employee loss of eligibility for a benefit plan dependency

Enter a date in the Update Stop Date field for each applicable benefit if the Calculated Stop Date is incorrect. (This will update the Stop Date on the employee’s benefit record.) The Stop Date should be the last date on which the employee is covered by the active employee benefit plan.

1. Select “Change in Normal Hours – Reduction” as the Benefit End Reason.
2. SAVE

Benefit Evaluation Utility Solved | Unapply | Help

← Previous Save

Select All Clear All Only Selected Employee records will be updated upon Save.

Company Name	EE Number	Employee Name	Dependent Name	Benefit Plan	Date Ineligible	Calculated Stop Date	Update Stop Date	COBRA Eligible	Benefit End Reason
Acme Corporation	9896	Abernathy, Joshua		Dental	3/20/2020	3/19/2020	3/19/2020	<input type="checkbox"/>	Change in Normal Hours - Reduction
Acme Corporation	9896	Abernathy, Joshua	Abernathy, Martha	Dental	3/20/2020	3/19/2020	3/19/2020	<input type="checkbox"/>	Change in Normal Hours - Reduction
Acme Corporation	9896	Abernathy, Joshua		Vision	3/20/2020	3/19/2020	3/19/2020	<input type="checkbox"/>	Change in Normal Hours - Reduction
Acme Corporation	9896	Abernathy, Joshua	Abernathy, Martha	Vision	3/20/2020	3/19/2020	3/19/2020	<input type="checkbox"/>	Change in Normal Hours - Reduction

**IMPORTANT NOTE:** Any dates in any field when the Benefit Evaluation Utility is saved will be updated in the employee and dependent records and may result in an inadvertent termination of benefits. Remove the dates or resolve any other employee eligibility issues reported in the Benefit Evaluation Utility before saving.

## COBRA Qualifying Event Confirmation

The customer’s COBRA Integration contact will receive a message indicating the successful creation of a COBRA Event Record for the employee. The COBRA Qualifying Event notice will mail within approximately 2-3 business days.