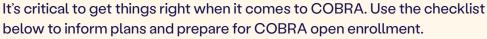


The COBRA open enrollment checklist





Determine the plan anniversary/effective date of the new plan.		Check with your COBRA vendor that your eligibility file feed is working correctly. Look to correct any errors on the file ahead of COBRA open enrollment. Include any new carrier plans on that file and confirm are shared with your COBRA vendor.
Reach out to your COBRA vendor to set up COBRA open enrollment (90-120 days ahead of the plan anniversary).		
Confirm with your COBRA vendor their processing time and your COBRA open enrollment dates.		Determine with your COBRA vendor when COBRA open enrollment notices will be sent and that all eligible COBRA participants and Qualified Beneficiaries have received their
Decide if you want COBRA open enrollment to be passive or active.		COBRA packets. Validate with your COBRA vendor that either a file is set
Make sure all COBRA-eligible plans are offered. Double-check commonly missed plans like EAPs and HRAs.		up with the carriers to communicate new elections or that they have the correct contact on file to email elections too This is especially important when making carrier changes.
Update the carrier plans if changing plan options or changing carriers. If conducting a passive enrollment, make sure to map your carrier plans so those not making active elections will roll into the most similar plan.		Find out how remittance will work with your carriers.

- + Notice of HIPAA Special Enrollment Rights
- + Summary Plan Description (SPD)

Share all new rates with your COBRA vendor or upload

Provide all new documents to your COBRA vendor,

- + HIPAA Privacy Notice
- + CHIPRA Notice

them to their platform.

such as:

- + WHCRA Notice
- + Medicare Part D Notice
- + Summary Annual Report
- + Benefit Summaries
- + SBCS Annual Notices
- + and any others you'd like included.

About Forma

Forma's flexible benefits software helps companies offer competitive benefits packages while reducing costs and inefficiencies, by offering employees more choice and flexibility in how they spend their benefit allowances.

