

Ceridian COBRA Continuation Services Frequently Asked Questions - Web Reporting

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1. What reports are available on the Ceridian Web site?

There are different types of reports available on the Ceridian Web site and each type has its advantages.

- Queries and status reports automatically generate reports based on the segment of participants selected. The format of these reports is preset and you can download a report into an EXCEL spreadsheet. You can customize a report by deleting unwanted information, adding columns for more information, and sorting by specific criteria. These reports include information provided as of the last update.
- Rate Reports provide electronic copies of the latest Rate Reports. These reports show all of a group's plans, including the codes assigned to identify them (Benefits Classes will no longer be valid after the enhanced services are activated) and the 100% rates currently in use on the Ceridian system. The group can review, print or download the latest report into an EXCEL spreadsheet.
- COBRA reports provide electronic versions of reports supplied by Ceridian. These reports are available as soon as processing is completed. A group must go to the Ceridian Web site to retrieve the reports. No notification is provided about available reports. The reports can be printed or

downloaded into an EXCEL spreadsheet. In addition, three months of the Monthly Participant Status Report and Premium Distribution Reports are available online. By using the Web site to obtain these reports, the information is immediately available in a paperless format.

- WebQE reports give the group information about forms submitted using the Ceridian Web site.

2. Where does a group find the queries and status reports?

- Go to the Ceridian Web site (<http://www.ceridian-benefits.com>).
- To access the system, type the group's Ceridian login and password.
- Select **COBRA/BBS/SCS Queries**.
- Select a **Product Menu**.
- Click **Ceridian COBRA Services**.
- Click **Reports**.
- Select the query to run.

The first item on the list of queries is General Instructions. This section tells a group how to download the query results into EXCEL.

Many reports have two versions: one with no filters and one with filters. All reports with no filters gives a list of all active COBRA participants and any qualified beneficiaries that are waiting to elect. All reports with filters allow a group to pick the portion of the population that a group wants to see. If a group selects a report with filters, all of the boxes on the filter selection screen must be completed or else no results will be displayed. If a box does not apply to the group, type "ALL".

3. Where does a group find the Rate Report?

- Go to the Ceridian Web site (<http://www.ceridian-benefits.com>).
- To access the system, type the group's Ceridian login and password.
- Select **COBRA/BBS/SCS Administration**.
- Select a **Product Menu**.
- Click **Ceridian COBRA Services**.
- Click **Self-Service Client Reports**.
- Click **Rate Reports**.

4. Where does a group find the COBRA reports?

- Go to the Ceridian Web site (<http://www.ceridian-benefits.com>).
- To access the system, type the group's Ceridian login and password.
- Select **COBRA/BBS/SCS Administration**.
- Select a **Product Menu**.
- Click **Ceridian COBRA Services**.

- Click **Self-Service Client Reports**.
- Click **COBRA Reports**.
- Select the report.

5. Where does a group find the WebQE reports?

- Go to the Ceridian Web site (<http://www.ceridian-benefits.com>).
- To access the system, type the group's Ceridian login and password.
- Select **COBRA/BBS/SCS Administration**.
- Select a **Product Menu**.
- Click **Ceridian COBRA Services**.
- Click **Self-Service Client Reports**.
- Click **WebQE Reports**.
- Select the report.

6. What queries and status reports are available on the Ceridian Web site?

The queries and status reports currently available where a group is able to set the criteria for the report and can download the results into EXCEL include:

Report Name	Who is included in the report?	Example of how can the report can be used	Fields included in the report	Filters Available
Address List (no filters)	All participants in an active or waiting status	To produce mailing labels for open enrollment	Service Type (COBRA or BBS) Status (Active or Waiting) Social Security Number Participant's Name 1 st Line of Address 2 nd Line of Address City State ZIP Code ZIP+4 Code COBRA Termination Date	None
Address List (with filters)	COBRA or BBS participants in an active or waiting status	To produce mailing labels for open enrollment	Service Type (COBRA or BBS) Status (Active or Waiting) Social Security Number Participant's Name 1 st Line of Address 2 nd Line of Address	Ceridian COBRA Division Code (## or ALL) Ceridian COBRA Unit Code (## or ALL) COBRA Termination Date Greater Than MM/DD/YYYY

Report Name	Who is included in the report?	Example of how can the report can be used	Fields included in the report	Filters Available
			City State ZIP Code ZIP+4 Code COBRA Termination Date	Status (ACTIVE, WAITING or ALL) Product Type (COBRA, BBS or ALL)
Benefits Billing Life Premiums (no filters)	BBS Participants in an active status with life insurance	To figure out the amount of life insurance premiums to pay the carrier for BBS participants	Status Social Security Number Participant's Name Division Code Unit Code Paid Through Date Monthly Premium Billed	None
Benefits Billing Life Premiums (with filters)	BBS Participants in an active status with life insurance	To figure out the amount of life insurance premiums to pay the carrier for BBS participants	Status Social Security Number Participant's Name Division Code Unit Code Paid Through Date Monthly Premium Billed	Ceridian COBRA Division Code (## or ALL) Ceridian COBRA Unit Code (## or ALL) Status Type (ACTIVE, WAITING or ALL)
Eligibility Detail (no filters)	All COBRA or BBS participants	To compare with bills from carriers	Service Type (COBRA or BBS) Status (Active or Waiting) Social Security Number Participant's Name Division Code Unit Code Participant ID# Date of Birth Gender Ceridian COBRA Carrier Code Coverage Type (Medical, Dental, Vision, Hearing, Prescription, Other) Ceridian COBRA Option Code Ceridian COBRA Family Status Code Monthly FSA Contribution Paid Through Date	None
Eligibility Detail By SSN (with filters)	All COBRA or BBS participants sorted by Participant's	To compare with bills from carriers	Service Type (COBRA or BBS) Status (Active or Waiting) Social Security Number	Ceridian COBRA Division Code (## or ALL) Ceridian COBRA Unit Code

Report Name	Who is included in the report?	Example of how can the report can be used	Fields included in the report	Filters Available
	Social Security Number		Participant's Name Division Code Unit Code Participant ID# Date of Birth Gender Ceridian COBRA Carrier Code Coverage Type (Medical, Dental, Vision, Hearing, Prescription, Other) Ceridian COBRA Option Code Ceridian COBRA Family Status Code Monthly FSA Contribution Paid Through Date	(## or ALL) Status Type (ACTIVE, WAITING or ALL) Product Type (COBRA, BBS or ALL) Carrier Code (Carrier Code from Ceridian COBRA Flex Sheet or ALL)
Eligibility Detail By Status and Division (with filters)	All COBRA or BBS participants sorted by Participant's Status and Ceridian COBRA Division Code	To compare with bills from carriers	Service Type (COBRA or BBS) Status (Active or Waiting) Social Security Number Participant's Name Division Code Unit Code Participant ID# Date of Birth Gender Ceridian COBRA Carrier Code Coverage Type (Medical, Dental, Vision, Hearing, Prescription, Other) Ceridian COBRA Option Code Ceridian COBRA Family Status Code Monthly FSA Contribution Paid Through Date	Ceridian COBRA Division Code (## or ALL) Ceridian COBRA Unit Code (## or ALL) Status Type (ACTIVE, WAITING or ALL) Product Type (COBRA, BBS or ALL) Carrier Code (Carrier Code from Ceridian COBRA Flex Sheet or ALL)
FSA Participant Detail (no filters)	All COBRA or BBS participants who have elected to continue their FSA contributions	To figure out the amount of contributions that need to be forwarded to your FSA provider	Service Type (COBRA or BBS) Status (Active or Waiting) Social Security Number Participant's Name Division Code Unit Code Monthly FSA Amount	None
FSA Participant Detail (with filters)	All COBRA or BBS participants who	To figure out the amount of contributions that	Service Type (COBRA or BBS) Status (Active or Waiting)	Ceridian COBRA Division Code (## or ALL)

Report Name	Who is included in the report?	Example of how can the report can be used	Fields included in the report	Filters Available
	have elected to continue their FSA contributions	need to be forwarded to your FSA provider	Social Security Number Participant's Name Division Code Unit Code Monthly FSA Amount	Ceridian COBRA Unit Code (## or ALL) Status Type (ACTIVE, WAITING or ALL) Product Type (COBRA, BBS or ALL)
Headcount (no filters)	Counts of the number of participants sorted by status, type of coverage, carrier code, option code, family status, and FSA election	To figure out the amount to pay the carriers for participants	Count (# of participants) Service Type (COBRA or BBS) Status (Active or Waiting) Division Code Unit Code Coverage Type (Medical, Dental, Vision, Hearing, Prescription, Other) Carrier Code Option Code Family Status Code FSA?	None
Headcount (with filters)	Counts of the number of participants sorted by status, type of coverage, carrier code, option code, family status, and FSA election	To figure out the amount to pay the carriers for participants	Count (# of participants) Service Type (COBRA or BBS) Status (Active or Waiting) Division Code Unit Code Coverage Type (Medical, Dental, Vision, Hearing, Prescription, Other) Carrier Code Option Code Family Status Code FSA?	Ceridian COBRA Division Code (## or ALL) Ceridian COBRA Unit Code (## or ALL) Status Type (ACTIVE, WAITING or ALL) Product Type (COBRA, BBS or ALL) Carrier Code (Carrier Code from Ceridian COBRA Flex Sheet or ALL)
Participant Details (no filters)	COBRA or BBS Participants	To obtain a list of current paid through dates for participants	Service Type (COBRA or BBS) Status (Active or Waiting) Social Security Number Participant's Name Division Code Unit Code Paid Through Date	None
Participant Details (with filters)	COBRA or BBS Participants	To obtain a list of current paid through dates for participants	Service Type (COBRA or BBS) Status (Active or Waiting) Social Security Number	Ceridian COBRA Division Code (## or ALL) Ceridian COBRA Unit Code

Report Name	Who is included in the report?	Example of how can the report can be used	Fields included in the report	Filters Available
			Participant's Name Division Code Unit Code Paid Through Date	(## or ALL) Status Type (ACTIVE, WAITING or ALL) Product Type (COBRA, BBS or ALL)
Participant Key Date List (no filters)	COBRA or BBS Participants with key dates	To check when a notice was sent to a participant	Service Type (COBRA or BBS) Status (Active or Waiting) Social Security Number Participant's Name Division Code Unit Code QE Code (Reason for the Qualifying Event) COBRA Begin Date (Date COBRA began) COBRA Term Date (Maximum Coverage End Date) Letter Sent (Date of COBRA Qualifying Event Notice) Paid Through Date	None
Participant Key Date List (with filters)	COBRA or BBS Participants with key dates	To check when a notice was sent to a participant	Service Type (COBRA or BBS) Status (Active or Waiting) Social Security Number Participant's Name Division Code Unit Code QE Code (Reason for the Qualifying Event) COBRA Begin Date (Date COBRA began) COBRA Term Date (Maximum Coverage End Date) Letter Sent (Date of COBRA Qualifying Event Notice) Paid Through Date	Ceridian COBRA Division Code (## or ALL) Ceridian COBRA Unit Code (## or ALL) Status Type (ACTIVE, WAITING or ALL) Product Type (COBRA, BBS or ALL)
Participants With Subsidy (no filters)	COBRA or BBS Participants where the group pays a	To figure out the amount to pay the carriers for participants where part	Service Type (COBRA or BBS) Status (Active or Waiting) Social Security Number	None

Report Name	Who is included in the report?	Example of how can the report can be used	Fields included in the report	Filters Available
	portion of the participant's premium	of the premium comes from the participant and part of the premium is paid by the group	Participant's Name Division Code Unit Code Coverage Type (Medical, Dental, Vision, Hearing, Prescription, Other) Carrier Code Option Code Family Status Code Plan Name Subsidy Begin Date Subsidy End Date COBRA Term Date	
Participants With Subsidy (with filters)	COBRA or BBS Participants where the group pays a portion of the participant's premium	To figure out the amount to pay the carriers for participants where part of the premium comes from the participant and part of the premium is paid by the group	Service Type (COBRA or BBS) Status (Active or Waiting) Social Security Number Participant's Name Division Code Unit Code Coverage Type (Medical, Dental, Vision, Hearing, Prescription, Other) Carrier Code Option Code Family Status Code Plan Name Subsidy Begin Date Subsidy End Date COBRA Term Date	Ceridian COBRA Division Code (## or ALL) Ceridian COBRA Unit Code (## or ALL) Status Type (ACTIVE, WAITING or ALL) Product Type (COBRA, BBS or ALL) Carrier Code (Carrier Code from Ceridian COBRA Flex Sheet or ALL)
Summary – By Division and Unit	Summary List sorted by division code, unit code and status	To get a rough estimate of the number of active participants by division	Count (# of participants) Service Type (COBRA or BBS) Division Code Unit Code Status (Active or Waiting)	None
Summary – By Status	Summary List sorted by status	To get a rough estimate of the number of active participants	Count (# of participants) Service Type (COBRA or BBS) Status (Active or Waiting)	None
Summary – FSA	Summary List sorted by FSA election and status	To get a rough estimate of the number of active participants who elected	Count (# of participants) Service Type (COBRA or BBS) Status (Active or Waiting)	None

Report Name	Who is included in the report?	Example of how can the report can be used	Fields included in the report	Filters Available
		to continue their FSAs	Division Code Unit Code	
Summary – Qualifying Events	Summary List sorted by reason for the qualifying event	To get a rough estimate of the number of participants who had a qualifying event due to layoff	Count (# of participants) Service Type (COBRA or BBS) Qualifying Event	None

7. What rate reports are available on the Ceridian Web site?

The latest rate report is available online. This is the same report that is printed and mailed to a group. Because rate information is updated each time a group opens a session, the rate report reflects a group's plan information as of that moment in time. As plans are added, or rates are updated, the rate report is updated immediately. This up-to-the-minute report gives a group the appropriate codes for all of the plans administered by Ceridian with the 100% rates. The Ceridian system automatically adds the 2% administrative fee to the rates when communicating with the participant.

8. What COBRA management reports are available on the Ceridian Web site?

Monthly Status Reports

Monthly participant status reports are available online. These are the same reports printed and mailed to a group. A group has the option to receive the report online or as a paper report. Three reporting periods are available online. These reports represent a snapshot of the COBRA population as of the date of the reports. A group simply looks online for the report after the 8th of each month following the end of a reporting period. For example, if a group is looking for a report from the September reporting period, the group checks the Web site on or about October 8th for the report. No emails are sent advising the group that the reports are available.

Printable Reports—A group can print one of the following reports at a local printer:

Participant Status Report (Action Required) —All active participants, elections, reinstatements, cancellations, etc.

Participant Status Report (Information Only) —All participants who have been notified and not elected, all participants who have elected but not paid, all participants who have let their election rights expire.

Participant Status Summary Report—A summary for each Division and Unit of all participants by Status for each carrier.

Search by SSN—A group can search for the following appropriate sections of a report for a particular participant and print a report for that individual:

Participant Status Report (Action Required) —All active participants, elections, reinstatements, cancellations, etc.

Participant Status Report (Information Only) —All participants who have been notified and not elected, all participants who have elected but not paid, all participants who have let their election rights expire.

Request XML Data File—A group can request a data file for the appropriate sections of the report that can be downloaded into a spreadsheet. The group first saves the file as an XLS file (an EXCEL spreadsheet file) before opening it in EXCEL. After a group has saved the file as an XLS file, they can open it into an EXCEL spreadsheet. Now the group can sort and rearrange the data to suit their individual needs.

Participant Status Report (Action Required)—All active participants, elections, reinstatements, cancellations, etc.

Participant Status Report (Information Only)—All participants who have been notified and not elected, all participants who have elected but not paid, all participants who have let their election rights expire.

Participant Status Report

This is a one-page report about a particular participant. A group can request the report by Social Security or Participant ID number.

Population Status

This report allows a group to get information about a group's participants based on predefined selection criteria. The report also allows a group to choose the following sorting criteria and options.

Search Criteria:

Social Security number

Participant's last name

QE Date Range (a group selects the month and year from drop-down boxes)

Sorting Options:

Social Security number

Participant's last name

Qualifying Event Date

Premium Disbursements

Premium Disbursement reports are available online. These are the same reports printed and mailed to a group. Three reporting periods are available online. These reports are an itemized accounting statement of the premiums collected and disbursed to a group for the reporting period. A check will be mailed for the amount shown on the report. A group looks online for the new report after the 8th of each month following the end of a reporting period. For example, if a group is looking for the September reporting period report, the group checks the Web site for the report on or about October 8th. No emails are sent advising the group that the reports are available.

Printable Reports—A group can print the report at a local printer. A group has the choice of printing the full report or a summary report.

Request XML Data File—A group can request an XML data file for the appropriate sections of the report that can be downloaded into a spreadsheet. A group first saves the file as an XLS file (an EXCEL spreadsheet file) before opening it in EXCEL. After a group has saved the file as an XLS file, they can open it into an EXCEL spreadsheet. Now the group can sort and rearrange the data to suit their individual needs.

9. What WebQE reports are available on the Ceridian Web site?

Monthly Submission Reports

These reports give a group information about forms submitted via the web. A group can select the type of form, the sorting option, and the month of submission.

Types of Forms:

- COBRA Qualifying Event
- COBRA Takeover
- HIPAA Certificate Notification
- New Hire Notification

Sorting Options:

- Date Submitted
- Employee Social Security Number
- Participant Name

Participant Document

This report allows a group to print a copy of the forms submitted through the Web site for a group's files. A group can select the type of form and the search criteria.

Types of Forms:

- COBRA Qualifying Event
- COBRA Takeover
- HIPAA Certificate Notification
- New Hire Notification

Search Criteria:

- Employee Social Security Number
- Document Identification Number