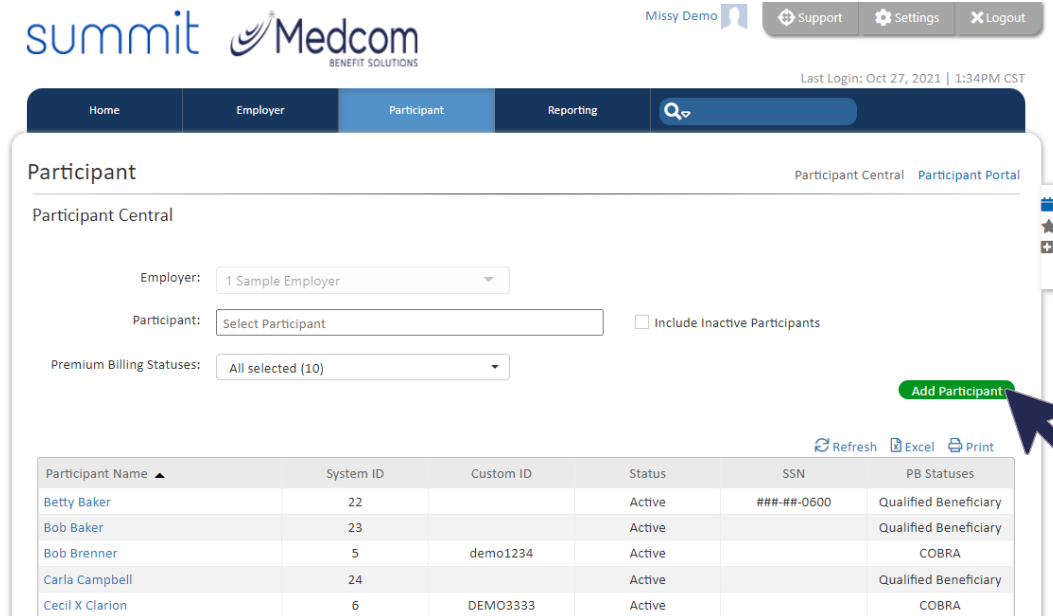


How to Process A Qualifying Event in Summit

Summit Training Videos.

https://youtube.com/playlist?list=PLFQmbiiL1IP00_Gx3jRQ9FDf9d55bB34e

1. Go to the Participant tab, Participant Central and click Add Participant



Participant Central

Employer: 1 Sample Employer

Participant: Select Participant Include Inactive Participants

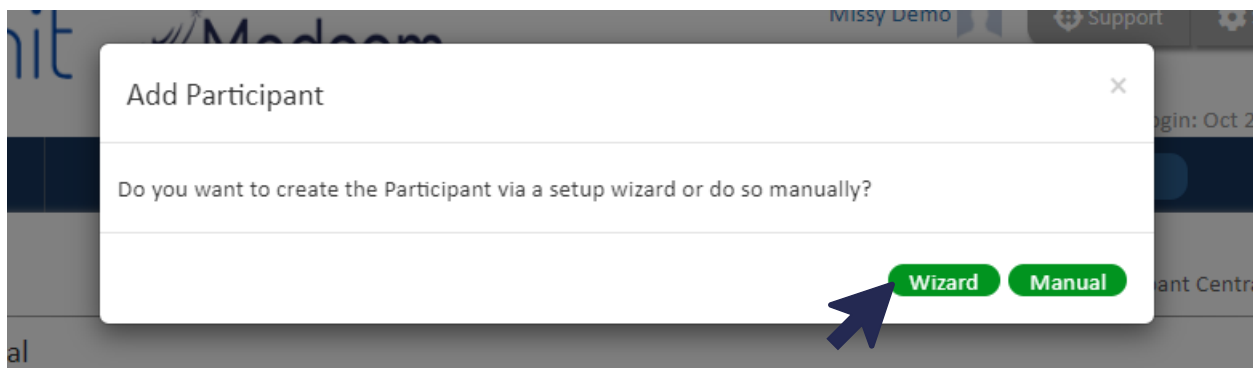
Premium Billing Statuses: All selected (10)

Add Participant

Refresh Excel Print

Participant Name	System ID	Custom ID	Status	SSN	PB Statuses
Betty Baker	22		Active	###-##-0600	Qualified Beneficiary
Bob Baker	23		Active		Qualified Beneficiary
Bob Brenner	5	demo1234	Active		COBRA
Carla Campbell	24		Active		Qualified Beneficiary
Cecil X Clarion	6	DEMO3333	Active		COBRA

2. Use the wizard when prompted



Add Participant

Do you want to create the Participant via a setup wizard or do so manually?

Wizard **Manual**

3. Add the employee demographics including SSN and DOB to notify the carrier. Add any dependent demographics if there are dependents covered on the group health plans. You have the option to add plans here or in the next step. Make sure to Save before existing.

Required Fields

Custom ID - SSN no dashes
 DOB



Participant Setup 🖨️ ✕

Employer: Cancel | **Save and Exit** | **Save and Add**

Step 1. Demographics ✎

First: * <input type="text"/>	Middle: <input type="text"/>
Last: * <input type="text"/>	Custom ID: <input type="text"/>
Status: <input type="text" value="Active"/>	Employment Status: <input type="text" value="Employed - Full Time"/>
Email: <input type="text"/> Send Email	
Work Phone: <input type="text"/>	Phone: <input type="text"/>
Mobile Phone: <input type="text"/>	Division: <input type="text" value="--Select One--"/>
Location: <input type="text" value="--Select One--"/>	Union: <input type="text" value="--Select One--"/>
	SSN: <input type="text"/>
PBM ID: <input type="text"/>	Health Plan ID: <input type="text"/>
Vision ID: <input type="text"/>	
Dental ID: <input type="text"/>	License: <input type="text"/>

[Mailing Address](#)

4. If you do not add plans to step 3, please add plans under the plan tab. If plans are listed select ALL and use edit selected plans

Participant Demographics: Sally Smith | 1 Sample Employer

First: Middle: Last:

Email: Custom ID: System ID:

[Send Email](#)

System Status: Employment Status:

Setup: [Resend Portal Link](#) VIP Participant:

Demographics | **Dependent** | Plans | Notes | Billing | Events | Receipts

[Add Plan](#)

Show Only QB/Participant Plans Include Previous Instances [Refresh](#) [Excel](#) [Print](#)

<input type="checkbox"/>	Name ▲	Type	Coverage Status	Last Coverage Action	Last Action Reason	Effective Date	Tier/Level	Premium Amount	Elected Amount	Annual Election	
<input type="checkbox"/>	COBRA Vision Plan	Vision	Active	Activate	New Hire	10/15/2021	EE Only	8.00	0.00	0.00	✎ 🗑️

[Edit Selected Plans](#)

If you are processing an event for the first time in Summit, we encourage you to watch a quick video on how to properly process events. If you do not process an event correctly, there is a good chance that paperwork will NOT be sent.

The training videos will show you how to process events correctly and explain the required fields. In addition to the standard required fields, we need SSN, DOB and Custom ID fields to be completed on each individual in the system. The Custom ID is the SSN with no dashes.

If this is not provided, the participant cannot log in online and we cannot properly update with the carriers. This will delay services for the participant if information is not provided.

We are not checking for incomplete requests or improperly completed requests

5. Update the REASON, EVENT DATE and ACTION then select save

Coverage Detail

Plan Name

Plan Name: COBRA Vision Plan Status: Active
Description: COBRA Vision Plan Plan Type: Vision
Effective Date: 1/1/2019

Plan Year Detail

Start Date: 1/1/2021 Plan End Date: 12/31/2021

Participant Coverage Detail

Status: Qualified Beneficiary

Reason: * Employment Change - Termination

Event Date: * 10/27/2021

Start Date: * 11/01/2021

Months: * 18

Deny

Assistance Eligible Individual

[+ Assign Subsidy](#)

Action: * Qualifying Event

Effective Date: * 11/01/2021

Event Notification Date: * 10/27/2021

Expiration Date: * 04/30/2023

6. Go to Events tab and expand benefit to see that COBRA election notice is listed

Participant Demographics: Sally Smith | 1 Sample Employer

First: Sally Middle: Last: Smith
 Email: mbrown@medcom.net Custom ID: System ID: 7
 Send Email
 System Status: Active Employment Status: Employed - Full Time
 Setup: Resend Portal Link VIP Participant:

Demographics Dependent Plans Notes Billing Events Receipts

Notifications Only Show Filters

Refresh Excel Print

Coverage	Type	Status		
>				
COBRA Vision Plan	Vision	Qualified Beneficiary		
Event Date	Event	User ID	Date Entered	Status
	Send Initial Notification – Detailed Benefits	missy.brown [TPA:- Medcom Benefit Solutions]	10/26/2021	
	Send COBRA Election Form	Missy.Demo [ER:- 1 Sample Employer]	10/27/2021	Qualified Beneficiary
10/20/2021	Send Initial Notification	Missy.Demo [ER:- 1 Sample Employer]	10/15/2021	Active
10/27/2021	Involuntary Termination	Missy.Demo [ER:- 1 Sample Employer]	10/27/2021	Qualified Beneficiary
10/27/2021	Notified of Qualifying Event	Missy.Demo [ER:- 1 Sample Employer]	10/27/2021	Qualified Beneficiary