OVERVIEW

BRI can integrate with a 3rd party platform to drive these business processes:

- NPM – for General Rights Notices
- QB – for COBRA Packets

and automate them with changes you enter into that platform.

Until a file feed for a particular data type is approved for production and goes live, BRI will need data from you directly to drive these business processes.

BRI can accept this data from you directly on our QB Spreadsheet, or by utilizing our online COBRA portal to manually enter data. Templates and directions on both are provided during implementation.

STEPS

1. LAYING THE GROUNDWORK

BRI Obtaining Plan Information

- BRI provides Client / Broker with "Carrier and Rate Information Spreadsheet" to capture COBRA-eligible plans

- Client / Broker returns completed "Carrier and Rate Information Spreadsheet" to BRI.

- BRI enters the client's plans into BRI's system.

These can happen at the same time.

Connecting Contacts

- Client makes a formal request to their vendor, indicating their desire to integrate the vendor's platform with BRI's system.

- Client provides vendor with BRI's EDI/Integration contact: <edi@benefitresource.com>

- Vendor contacts BRI with request to begin file feed testing.

2. FILE TESTING

Vendor and BRI Test

- BRI provides file specs, connection, and plan information to the vendor
- Vendor builds test file(s)
- Test files and feedback are exchanged
- Repeat as needed

3. FINALIZATION

Vendor and BRI Transition to Live Feed
- The file feed is approved for production
- Production schedules are established, and any needed plan redesign occurs
- The integration goes live, and BRI begins driving business processes with the data received

FAQ

HOW LONG DOES IT TAKE?

The primary factors driving how long it takes for a file feed to be approved for production and go live are:
- The types of data being sent
- The ability of the vendor (3rd party platform) to respond to BRI's feedback with new test files
- How well data is maintained in both the vendor's and BRI's system

BRI likes to set the expectation that COBRA integrations can take 8 to 12 weeks from receipt of the first test file until approval for production.

WJAT CAN I DO TO SPEED THINGS UP?

- **Connecting** – Getting the vendor connected with the appropriate party at BRI is the first step, and generally not something BRI can assist with. Both the vendor and BRI serve you, but we have no direct relationship with each other until you establish it.
- **Structure** – If you are new to a vendor's system, making sure that data in their system is correctly structured is crucial. BRI is happy to provide our EDI requirements, and limited plan design documentation, to assist with this.
- **Work Orders** – Vendors may require submission of one or more work orders, service requests, or tickets before they are ready to reach out to BRI. BRI's EDI Contact can provide file specifications and a general outline of how data is to be exchanged to assist with a work order being submitted.
- **Involvement** – Staying involved in the testing process (including encouraging a vendor to provide updated test files) can sometimes be helpful.
- **Maintenance** – Until an integration is approved for production and goes live, you may have to maintain data in both the vendor's and BRI's systems. Staying on top of this greatly speeds up the testing process and allows BRI to correctly administer your plans until the feed goes live.
- **Discrepancies** – Discrepancies often arise during the testing process. You, as the client that both the vendor and BRI are serving, are best situated to resolve these questions. Your involvement in the testing process is crucial when these discrepancies arise.