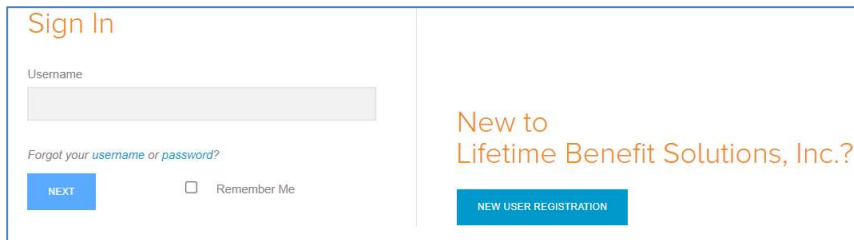


# Running the New AEI 2021 Premium Assistance Credit Report from Your Employer Portal

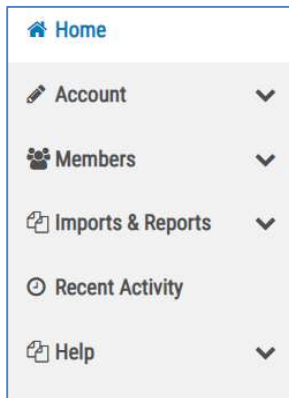
To assist groups with the filing for their credit, reporting functionality has been added to the COBRA employer portal that captures all AEI subsidy information. These instructions will help you to log into the employer portal and generate the report at your convenience. If you have any questions on the report, please reach out to your dedicated COBRA Administrator at Lifetime Benefit Solutions.

## How to Run the AEI 2021 Premium Assistance Credit Report

1. Log in to the COBRA employer portal at <https://cobra.lifetimebenefitsolutions.com>



2. On the landing page, locate **Import & Reports**.



3. Under **Import & Reports**, choose **Accounting Reports**.



- This will bring you to a new landing page. At the top, you will be instructed to choose the report you would like to generate. Through the list, you will want to choose **AEI 2021 Premium Assistance Credit**.

There are instructions in the image below on how to fill out the requirements with some tips.

**TIP:** If you would like a report to cover the entire quarter, enter the quarters date range in the respective date fields.

**Example:** Enter the start date set as 04/01/2021 and the end date as 06/30/2021 to cover the years entire second quarter.

**Choose Report Type** AEI 2021 Premium Assistance Credit

Description  
The AEI 2021 Assistance Report contains a listing of members who have premiums paid for in full or partially by the ARP Subsidy.

**Report Settings**

Employer Name: SUPPORT TEAM

Mask SSN on report

Premium Month Start Date \*

Premium Month End Date \*

**SUBSIDY TYPE**

AEI 2021 Subsidy

Employer Subsidy

Both AEI 2021 Subsidy and Employer Subsidy

**REPORT FORMAT**

Adobe Reader Format

Comma Separated Values Text File

XML File

Check this box if you do not want member SSN's to appear on the report.

Enter the date range you would like to generate on the report. **TIP:** It is best to use the 1<sup>st</sup> of a month and the last day of a month to assure everyone with coverage for a specific month appears on the report.

Choose the type of subsidy information you'd like on your report. You have the choice of generating only the AEI subsidy, only anyone with a non-AEI employer subsidy, or both.

Select the format you would like the report to be generated in.

- Under the report requirements fields, enter the desired email address to receive a notification once the report is complete and ready to be viewed. Once the email is entered, click the **blue box that says Run Report** to finish the request.

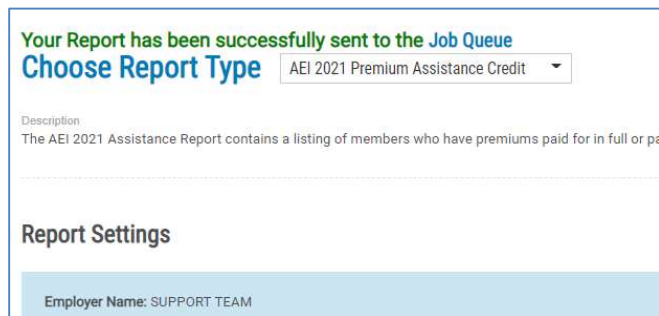
**Run Report**

Email Addresses to notify when Report is complete \*

Email is required

Your Report will be placed into the Job Queue and the email addresses above will be notified when it is complete.

- If you're successful, at the top of the page above the choose report option you will see that your report was successfully sent to be generated.



- Once the report is complete and ready to be viewed, the email address previously entered will receive a notification. You can locate the report in the **Job Queue** located under **Imports & Reports**. Once you're on the Job Queue landing page, locate the report labeled AEI 2021 Premium Assistance Credit and click **View** under the **Download Results**.

Imports & Reports		Active Jobs					
		Entered Date/Time	Category	Job Type	Started Date/Time	Completed Date/Time	Download Results
Imports		> 07/19/2021   8:54 AM	Report	AEI 2021 Premium Assistance Credit	07/19/2021   8:54 AM	07/19/2021   8:54 AM	
AEI 2021 Status Update							
Accounting Reports		> 06/29/2021   10:40 AM	Large Report	Remittance	06/29/2021   10:40 AM	06/29/2021   10:40 AM	<a href="#">View</a>
Standard Reports							
Report Inbox							
<b>Job Queue</b>		> 06/29/2021   9:47 AM	Large Report	Member Status	06/29/2021   9:47 AM	06/29/2021   9:47 AM	<a href="#">View</a>

## Report Description

The AEI 2021 Premium Assistance Credit report can be generated in the following formats:

- PDF
- CSV
- XML

### PDF Format

The AEI 2021 Premium Assistance Credit report in the PDF format contains the following sections:

- Report header
- Client section
- Division section
- Member section

#### **Report Header:**

The report header section of the report displays the AEI Subsidy Grand Total and/or Employer (EMP) Subsidy Grand Total, depending on the Subsidy Type selected when configuring the report.

#### **Client Section:**

Every client begins in a new page in the report. The client header is displayed on the top of the page and includes the following fields:

- Client Name
- Client ID
- EIN/Tax ID

After each Client section, Client Totals which is a common amount from all Client's members, is displayed for the following fields:

- Premium Amount
- Admin Fee
- EMP Subsidy (if selected in Subsidy Type from Step 4, this heading is Employer Subsidy)
- AEI Subsidy

### ***Division Section***

Every Division begins on a new page in the report. The division header is displayed on the top of the page and includes the following fields:

- Division Name

The Division Name is repeated on the top of each division section page. After each division section, Division Totals which is a common amount from all division's members, is displayed for the following fields:

- Premium Amount
- Admin Fee
- EMP Subsidy (if selected in Subsidy Type from Step 4, this heading is Employer Subsidy)
- AEI Subsidy

### ***Member Section***

The member section contains member tables. Each member table contains information only for one member. Member tables are sorted by the Premium Month and Year column ascending and then by the Insurance type column, according with the following priority order: Medical > Vision > Pharmacy > HRA > EAP.

After each member section, the AEI Effective date is displayed. The Member Totals, which is a common amount from all premium periods and plans, is also displayed for the following fields:

- Premium Amount
- Admin Fee
- EMP Subsidy (if selected in Subsidy Type from Step 4, this heading is Employer Subsidy)
- AEI Subsidy

## **CSV and XML Formats**

The AEI 2021 Premium Assistance Credit Report in CSV/XML format contains following sections. Within each section are applicable headers providing details related to the data provided.

- Client Assistance Total
- Member Assistance Total
- Member Assistance Details