HealthEquity®

COBRA & direct billing services

PARTICIPANT PORTAL GUIDE

QUICK START



Copyright © 2019 HealthEquity, Inc. All rights reserved.

TABLE OF CONTENTS

03 Accessing the portal

04 Electing COBRA coverage

05 Navigating the home page

06 Making a payment

07 Setting up recurring payments

08 Reviewing payment details

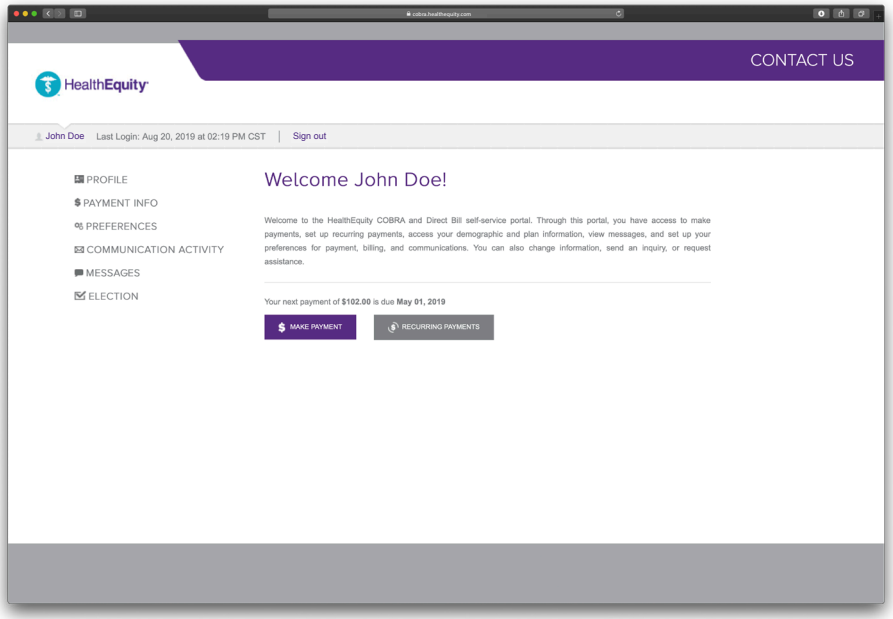
 Copyright © 2019 HealthEquity, Inc. All rights reserved.

INTRODUCTION

Welcome to the HealthEquity COBRA and Direct Billing Participant Portal. This portal gives you 24/7 access to view information and manage your COBRA and direct bill plans. This guide will help as you access the portal and perform key tasks to efficiently oversee your continuing healthcare coverage.

The COBRA and Direct Billing Participant Portal is convenient and easy to use. Any-time access to the portal allows you to:

- Enroll in coverage
- Make payments
- Set up recurring payments
- Review payment history and upcoming payments
- Review personal information



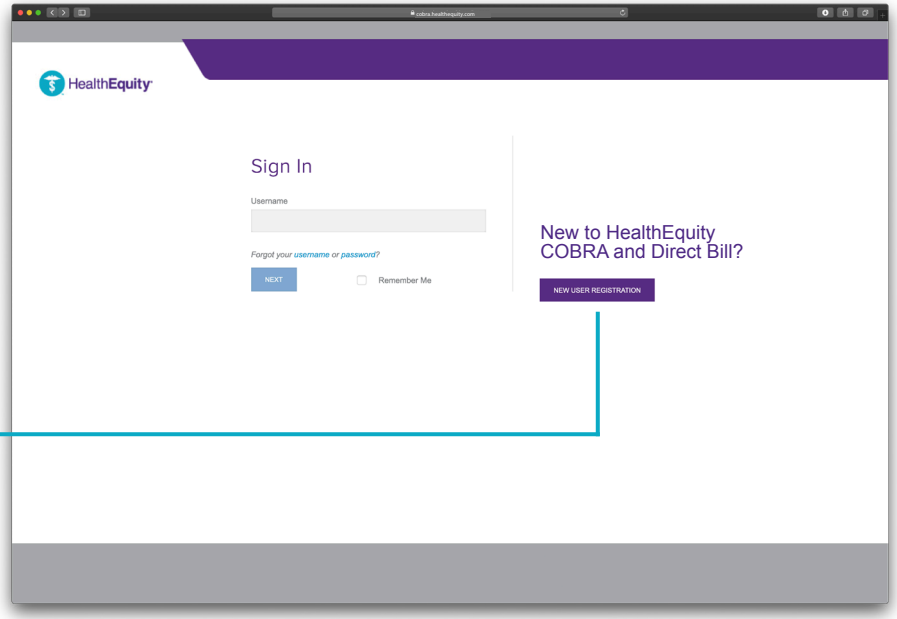
Sample

ACCESSING THE PORTAL

You should have received a New Member Login Notice in the mail, which contains your registration code.

If you have not received a New Member Login Notice please contact the HealthEquity COBRA support team at 1-844-341-6993.

Once you have received the code, navigate to **cobra.healthequity.com** and select **New User Registration**.

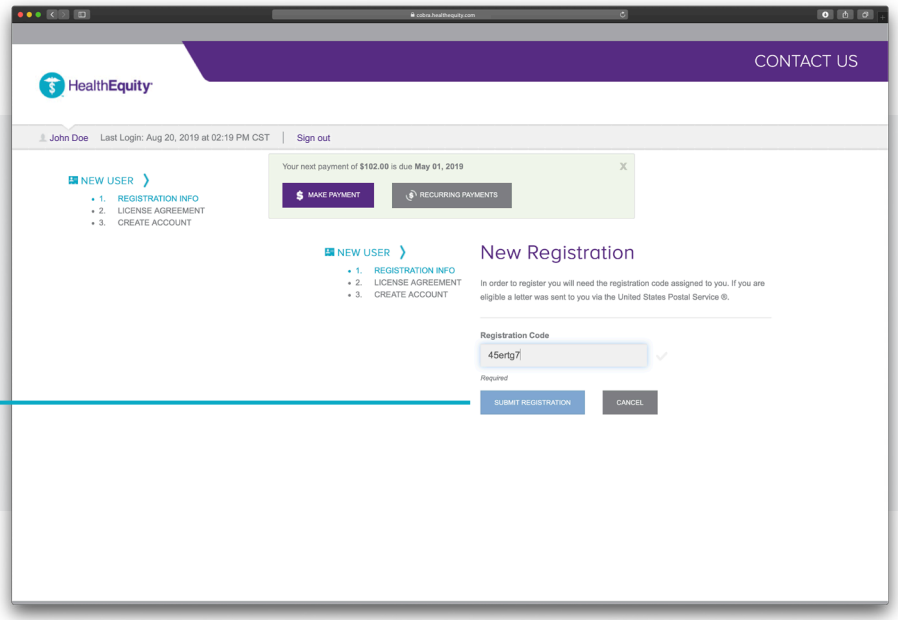


Sample

On the **New Registration Page**, enter your registration ID and click **Submit Registration**.

On subsequent pages you will be prompted to:

- Accept the New User License Agreement.
- Set up your username and password
- Click Submit and Create Account



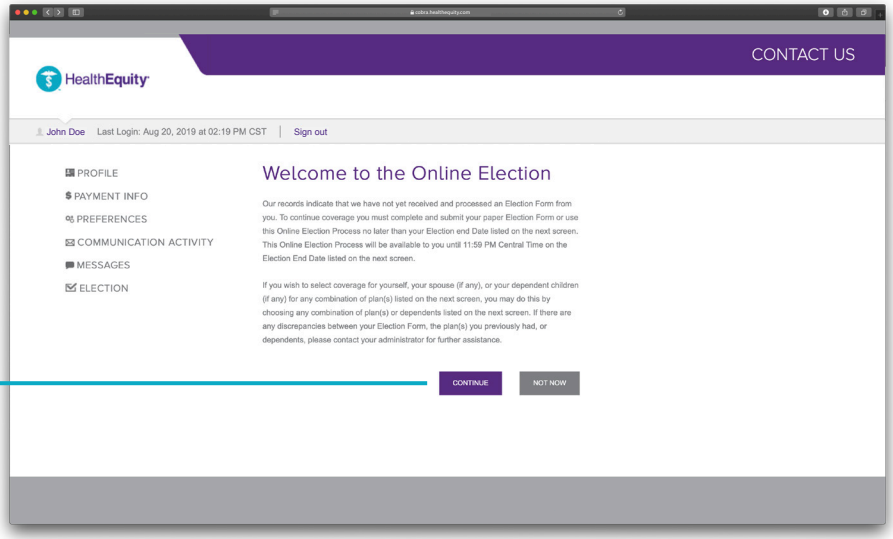
Sample

Copyright © 2019 HealthEquity, Inc. All rights reserved.

ELECTING COBRA COVERAGE

After registration, if you have not submitted an enrollment form, you will be directed to enroll in your COBRA benefits. From the portal you will be able to choose the products that you wish to elect as well as the coverage level for each product.

On the Election Welcome screen, click **Continue** to get started.



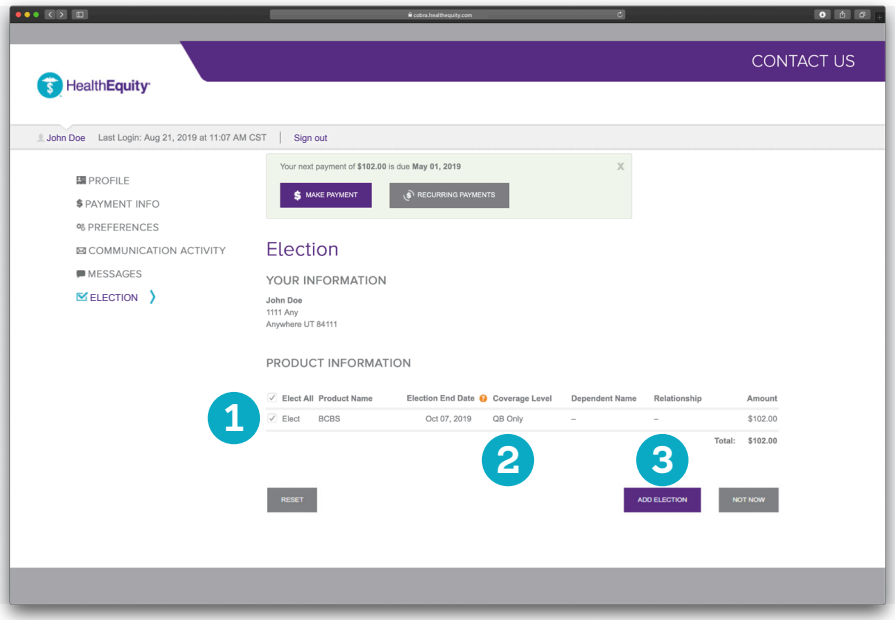
Sample

On the Election page:

1. Click the box for the products you wish to elect
2. Use the drop down menu to select your coverage level
3. Click the **Add Election** button

You will then be directed to Confirm your elections and agree to the User Agreement.

Once you have completed your elections you will be directed to your member portal Home Page.



Sample

Copyright © 2019 HealthEquity, Inc. All rights reserved.

NAVIGATING THE HOME PAGE

The Home page is designed to make managing your account quick and easy. Use the links in the left hand navigation and main page area to make payments, review coverage and oversee your COBRA account.

PROFILE
Review your personal information

PAYMENT INFO
Review your payment schedule

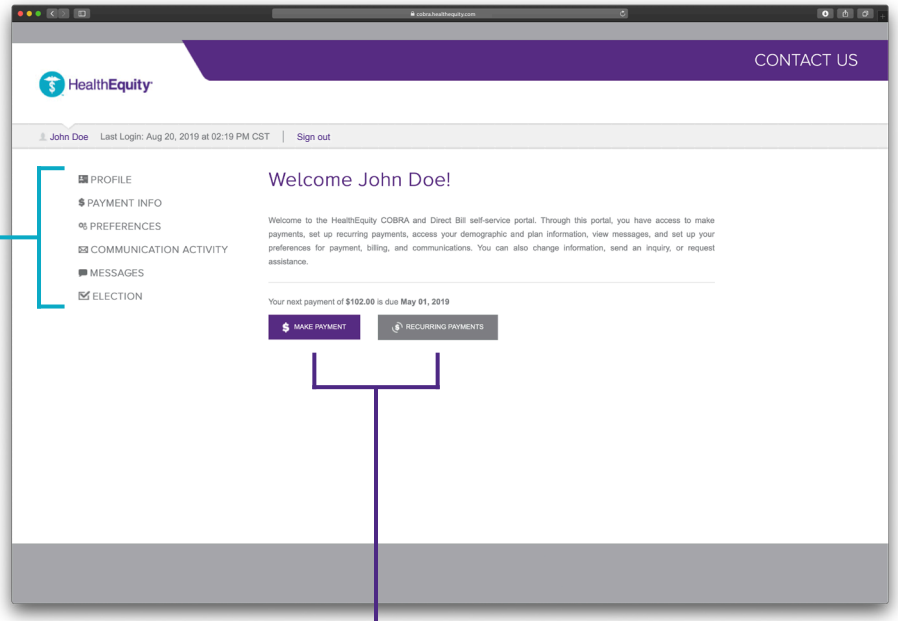
PREFERENCES
Update your login and communications options, the option to receive all notifications via e-mail

COMMUNICATION ACTIVITY
Review all notices regarding your continuing coverage

MESSAGES
View messages sent by the COBRA administration team

ELECTION
Review your election detail and coverage information

MAKE PAYMENT button
Make payments directly or set up recurring payments



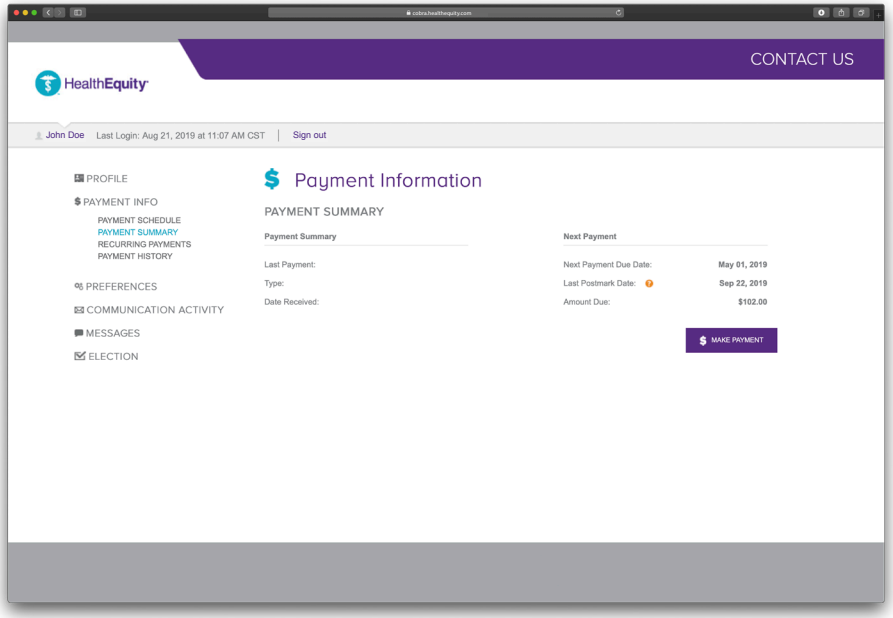
Sample

Copyright © 2019 HealthEquity, Inc. All rights reserved.

MAKING A PAYMENT

The portal provides several different locations for you to initiate a payment. You can begin the payment process by clicking the **Make Payment** button on the Home page.

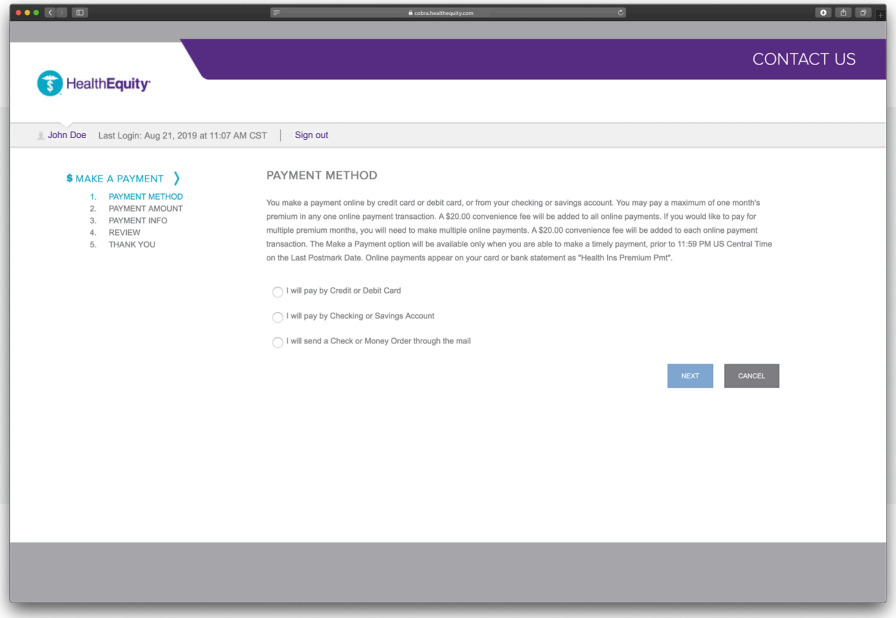
You can also click the **Payment Info** menu option, choose the **Payment Summary** link, and then click the **Make Payment** button.



Sample

You will then be taken to the **Make a Payment** section to complete the payment process. To make your payment:

- Select your payment method and click **Next**
- Select the amount you wish to pay and click **Next**
- Enter your credit/debit card or banking information and click **Next**
- Review and confirm your payment



Sample

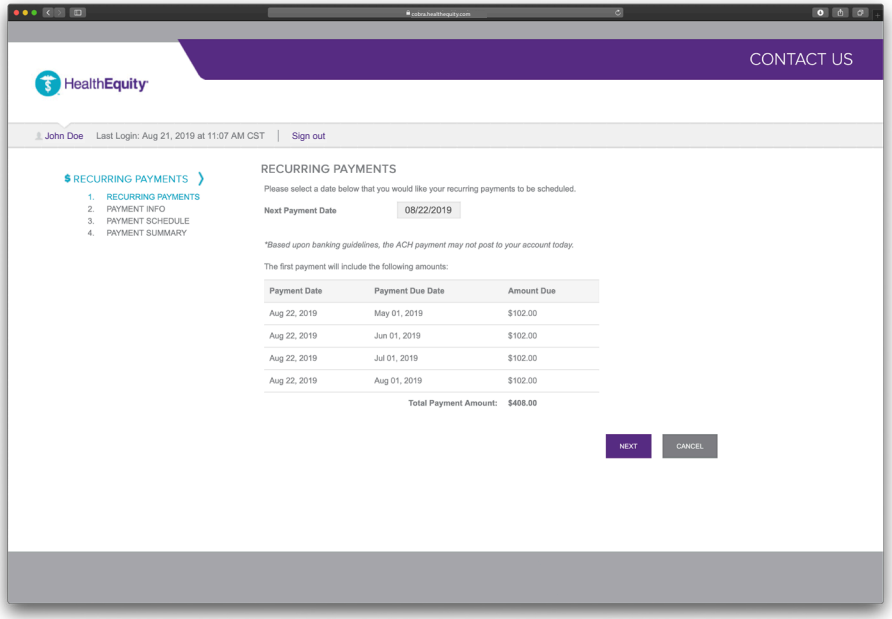
Copyright © 2019 HealthEquity, Inc. All rights reserved.

SETTING UP RECURRING PAYMENTS

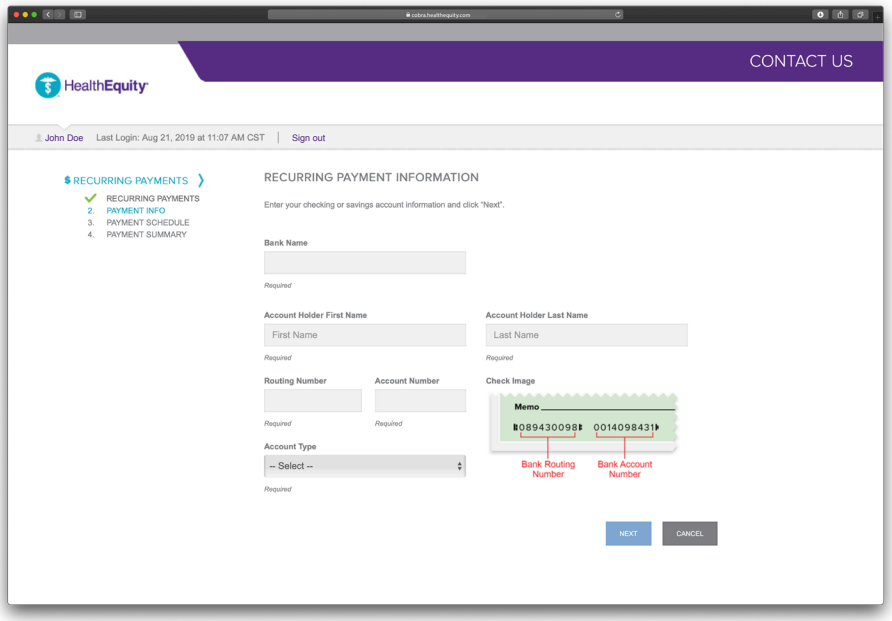
You can access the Recurring Payments screen by clicking the **Recurring Payments** button on the home page or by clicking the **Payment Info** menu option and choosing the **Recurring Payment** link.

To set up recurring payments:

- Review the info on the Recurring Payments Screen and click **Next**
- Set the Payment Schedule
- Enter your banking information on the Payment Information screen and click **Next**
- Review the Payment Summary screen



Sample



Sample

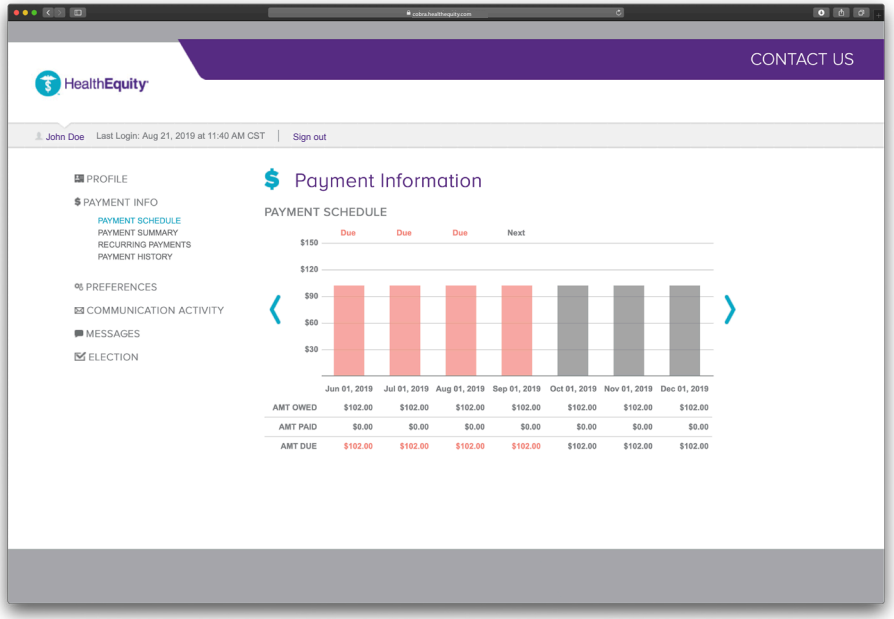
Copyright © 2019 HealthEquity, Inc. All rights reserved.

REVIEWING PAYMENT DETAILS

From the **Payment Info** menu in the left hand navigation, you can access your **Payment History** or your upcoming **Payment Schedule**.

PAYMENT SCHEDULE

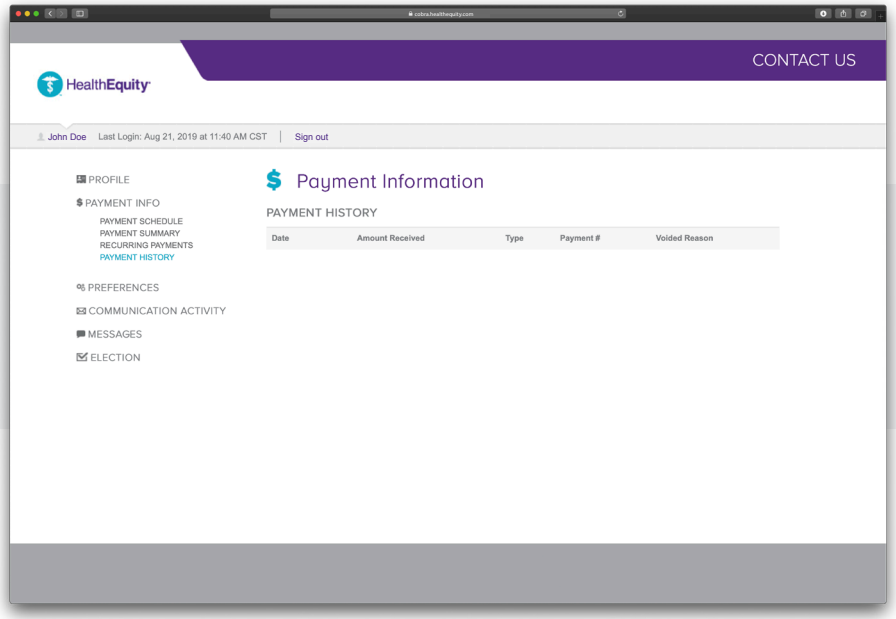
Shows payments that have been made, when your next payment is due, and your payment schedule for the next several months.



Sample

PAYMENT HISTORY

Provides a list of each payment that has been made, including the amount received and the date and type of payment.



Sample

Copyright © 2019 HealthEquity, Inc. All rights reserved. COBRA_participant_portal_guide_Aug_2019