

COBRA & Direct Billing DBM Import Specification

Version 1.2026

June 6, 2026

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Introduction

The Direct Bill Member (DBM) Import system was designed to allow for the easy importation of DBM information into the COBRA & Direct Billing system. The system utilizes a Comma Separated Values (CSV) import text file to input information about a DBM. This document is designed to explain the format and function of this import file.

Scope

This document will explain the format and function of the import file used to import DBMs into the system. It is not written to fully explain the DBM fields or define imports other than the DBM import. This document defines import version 2.0.

Definition of Terms

This document uses various terms that may have different meanings to different audiences. This section will help to explain these terms in the context of this document.

Special Plan Member

A Direct Bill Member (DBM) is a member in the COBRA & Direct Billing system that is on a pre-defined benefit plan.

CSV – Comma Separated Values file

A CSV file is a text file that contains values on each row that are separated by commas.

Note: You should not use Excel to edit or save these files as Excel will alter the format of large numeric columns (such as SSN) and make them unreadable to the system.

Import Version

Each import file should include a [VERSION] section that identifies the import version format the import file is adhering to.

If a [VERSION] record does not exist in the import file, an error will be generated.

The current version line should be: [VERSION],2.0

Line Identifier

Each text line that is imported must have a line identifier as its first field, This line identifier defines which fields come next on the text line.

Import File Layout

The DBM Import file is a CSV file where each line has comma separated values. To allow for the importation of different types of information, the first field of each line defines what type of information will follow for the fields of that line. For instance, to begin the importation of a DBM record, you will need a DBM line that starts with the [DBM] line identifier and may appear similar to the following:

```
[DBM],DBMDivision,DBMClient,MR,Bob,T,DBM4,520110004,1,preston.hehr@gmail.com,4025550002,,12
34 Some Street,Apt
3,Omaha,NE,68137,,M,1/1/1923,1/1/2009,,RETIREE,MONTHLY,FALSE,TRUE,,CLIENTDEFAULT,FALSE,UNKN
OWN,10/1/2009,UNKNOWN,UNKNOWN,,COUPONBOOK,TRUE, 1/1/2019, CUSTOM, 45
```

This DBM will also need a line that defines their plan information. This is accomplished with a line that begins with the [DBMPLAN] line identifier and may appear similar to the following:

```
[DBMPLAN],DBM1,10/1/2009,,EE+CHILD,10/1/2009,,,T,,,
```

All of the lines following the [DBM] line are related to that DBM. When a new [DBM] line is encountered, the previous DBM is validated and saved into the database and then the import process begins for the new DBM.

Line identifiers and their definitions are as follows:

Line Identifier	Required to Complete a DBM	Description
[DBM]	☒	The main DBM record
[DBMPLAN]	☒	Defines a single client plan that the DBM is to be assigned to. There must be at least one of these lines in the import file for each DBM, but there may be several for each DBM if the DBM is eligible for more than one plan.
[DBMDEPENDENT]		Defines a single dependent that is also eligible for the plan(s) under the DBM. This is an optional line, but there may be several of these lines for a DBM if there are multiple dependents under this DBM.
[DBMDEPENDENTPLAN]		Defines a single DBM Plan that a dependent is enrolled on for this DBM. These records must be under the appropriate [DBMDEPENDENT] record and there may be multiple of these for a single dependent.
[DBMPLANMEMBERSPECIFICRATE]		If a DBM is under a plan that has a rate type of "Member Specific Rates", then these lines are used to describe

		the rate to be used for this DBM. These records should be immediately after the [DBMPLAN] record that they refer to.
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Import Version Label

Each import file should include a [VERSION] section that identifies what import version format the import file is adhering to. If no [VERSION] record exists in the import file, it is assumed that the import file is adhering to Version 2.0. As new capabilities or changes are made to the import file format this document and the equivalent version number will be updated.

This revision of this document defines version 2.0 of the DBM Import.

Import Line Identifiers (Section Definitions)

The line identifiers explained in the [Import Version Label](#) section each expect various fields to follow them on their respective line. The tables below define these fields for each of the line identifiers.

Required fields need to have a value after the comma that corresponds to the data type specified. Non-required fields may be left blank (nothing appearing between the commas).

[VERSION]

Column Name	Data Type	Required	Accepted Values
VersionNumber	Integer		Use "2.0" for this import specification

[DBM]

Column Name	Data Type	Required	Description
ClientName	Text - 100	☒	The unique Client name assigned in the system
ClientDivisionName	Text - 50	☒	The unique Client Division name assigned in the system. If there are no divisions, then use the ClientName.
FirstName	Text - 50	☒	
LastName	Text - 50	☒	
SSN	SSN	☒	Social Security Number
IndividualID	Text - 50		Optional, used to store Employee ID #s or any other type of secondary identification.
Email	Email		
Phone	Phone		
Phone2	Phone		
Address1	Text - 50	☒	
Address2	Text - 50		
City	Text - 50	☒	
StateOrProvince	Text - 50	☒	
PostalCode	Text - 35	☒	
Sex	Sex	☒	F, M, U
DOB	Date	☒	*Date of Birth – required for age based plans
BillingStartDate	Date	☒	Date to start billing DBM
BillingType	Text-35	☒	RETIREE,PREMIUMPAY, CASHPAY, FMLA, LOANREPAYMENT, LEAVEOFABSENCE, LTDPREMIUM, STDPREMIUM, DISABILITYPREMIUM, CUSTOM
SubsequentGracePeriodNrOfDays	Integer		Overrides the Subsequent Grace Period for this DBM

IsLegacy	Boolean		If set to True, we set cobra.Participant.TakeOverDate to the same value as BillingStartDate
TobaccoUse	Text - 35	☒	YES, NO, UNKNOWN
EnrollmentDate	Date	☒	Original enrollment date of the DBM's plan - used for HIPAA certificate.
EmployeeType	Text - 35	☒	FTE, PTE, H1B, CONSULTANT, SABBATICAL, PROBATIONARY, CONTINGENT, TELECOMMUTING, INTERN, GROUPLADER, ASSOCIATE, PARTNER, UNKNOWN
EmployeePayrollType	Text - 35	☒	EXEMPT, NONEXEMPT, UNKNOWN
YearsOfService	Integer		Not used currently and only informational
InitialGracePeriodDays	Integer	Required when DBMInitialGracePeriodOptionType is "CUSTOM"	Number of days for the initial grace period that a non-elected DBM will have. Flexible Billing must be disabled.

[DBMPLAN]

The [DBMPLAN] record is for input of DBM Plans.

Column Name	Data Type	Required	Accepted Values
PlanName	Text – 50	☒	The unique Client plan name
StartDate	Date	☒	The start date that the DBM will begin coverage on this plan
EndDate	Date		Optional, the end date the DBM will cease coverage on this plan
CoverageLevel	Text – 35	☒	EE, EE+SPOUSE, EE+CHILD, EE+CHILDREN, EE+FAMILY, EE+1, EE+2, SPOUSEONLY, SPOUSE+CHILD, CHILDREN, EE+1Child, EE+2Children, EE+3Children, EE+4Children, EE+5orMoreChildren, EE+Spouse+1Child, EE+Spouse+2Children, EE+Spouse+3Children, EE+Spouse+4Children, EE+Spouse+5orMoreChildren, SPOUSE+1CHILD, SPOUSE+2CHILDREN, SPOUSE+3CHILDREN, SPOUSE+4CHILDREN, SPOUSE+5ORMORECHILDREN,

			EE+DOMESTICPARTNER, EE1UNDER19, EE+SPOUSE1UNDER19, EE+SPOUSE2UNDER19, EE+CHILDREN1UNDER19, EE+CHILDREN2UNDER19, EE+CHILDREN3UNDER19, EE+FAMILY1UNDER19, EE+FAMILY2UNDER19, EE+FAMILY3UNDER19
FirstDayOfCoverage	Date		The First Day of Coverage. Unless this is an open enrollment plan, this field should be left blank. If left blank the system will determine the FDOC.
LastDayOfCoverage	Date		The Last Day of Coverage. Unless this is an open enrollment plan, this field should be left blank. If left blank the system will determine the LDOC.
NumberOfUnits	Decimal		Sets the # of units for this plan. Required if the plan is units based (e.g. Life).
PlanBundleName	Text - 50		Conditionally required for plans that are part of a bundle

[DBMDEPENDENT]

Optional

Column Name	Data Type	Required	Description
SSN	SSN		Social Security Number
Relationship	Text – 35	☒	SPOUSE, CHILD, DOMESTICPARTNER
FirstName	Text – 50	☒	
LastName	Text – 50	☒	
Email	Email		
Phone	Phone		
AddressSameAsDBM	Boolean	☒	Will be parsed and used to overwrite the sent address info to that of the associated DBM if its set to TRUE
Address1	Text – 50		
Address2	Text – 50		
City	Text – 50		
StateOrProvince	Text – 50		
PostalCode	Text – 35		
Sex	Sex		F, M, U (this is required if the dependent is on a sex based plan that sets rates based on the dependent's sex)
DOB	Date	*	Date of birth (this is required if the dependent is on an age based plan that sets rates based on the dependent's age)

IsQMCSO	Boolean		TRUE if the dependent is under a Qualified Medical Child Support Order (QMCSO) will be cobra.Participant
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[DBMDEPENDENTPLAN]

If applicable

The [DBMDEPENDENTPLAN] record is for more advanced input of DBM Dependent Plan information such as a Dependent going on or off a plan over time.

Column Name	Data Type	Required	Description
PlanName	Text - 50	☒	The unique Client plan name
StartDate	Date	☒	The start date of the dependent on the plan.
EndDate	Date		The end date of the dependent on the plan

[DBMPLANMEMBERSPECIFICRATE]

If applicable

The [DBMPLANMEMBERSPECIFICRATE] record is for input of member specific rates that change over time.

Column Name	Data Type	Required	Description
PlanName	Text – 50	☒	Unique Client plan name
StartDate	Date	☒	The start date of the member specific rate on the plan. This should be set to the FDOC for the plan in the field above.
EndDate	Date		End date of the member specific rate
Rate	Money	☒	The amount of the member specific rate

Data Types

The data types used in the various import sections are defined below.

Note: The fields in the import file are all text fields (since the file is CSV format). The following definitions explain the formatting of the text in the corresponding field.

Data Type	Definition
Text	Can be any text value up to the number of characters specified. If the text contains a comma, then the entire field should be enclosed in double quotes ("). If you need a double quote to be represented in the text then the double quote (") must be escaped with a back slash (\"). To get the text - My "Cool" Company – you would represent it like this – My \"Cool\" Company - this escape character works inside other double quotes as well, for example "My \"other\" Company" would be represented by "My \"other\" Company".
Integer	Can be any number from 0 to 32,767. No punctuation.
Date	Entered as MM/DD/YYYY, where MM is the month, DD is the day and YYYY is the year. You can use a single digit or two digit leading zero for the month and day. The year should always be entered as 4 digits.
DateTime	Entered as MM/DD/YYYY HH:mm AM, where MM is the month, DD is the day and YYYY is the year, HH is the hour, mm is the minute and AM is either AM or PM. You can use a single digit or two digit leading zero for the month, day, hour and minute. The year should always be entered as 4 digits.
Boolean	True = "1", "Y", "YES", "T" or "TRUE", False="0", "N", "NO", "F" or "FALSE".
Money	Format as a number with one period, no commas and always have at least one digit to the left of the period and 2 digits to the right of the period. IE: 12 cents would be entered 0.12
SSN	Format as 9 digits, can also include the dashes. Leading zeros are required if the SSN begins with zeros.
Sex	Single character where F = Female, M = Male, U = Undisclosed.
Phone	Format as 10 digits.
Email	Text – 100, with at least one "@" and at least one "." after the @.
UserName	Text – 50. This field MUST match an existing user in the system, but may be left empty, in which case the UserName of the person doing the Import will be used as the UserName for the record.
Decimal	Format as a number with one period, no commas and always have at least one digit to the left of the period and up to 4 digits to the right of the period. Example: 0.1234

Sample Import File

The following text is the contents of a sample file that demonstrates the import of a DBM.

```
[VERSION],2.0
[DBM],DBMDivision,DBMClient,Bob,Smith,520110004,1,preston.hehr@gmail.com,4025550002,,1234 Some
Street,Apt
3,Omaha,NE,68137,M,1/1/1923,1/1/2009,RETIREE,,FALSE,UNKNOWN,10/1/2009,UNKNOWN,UNKNOWN,45
[DBMPLAN],DBM1,10/1/2009,,EE+CHILD,10/1/2009,,0
[DBMDependent],111220004,CHILD,Billy,Smith,,,T,,,,M,1/1/1999,F
[DBMDependentPlan],DBM1,10/1/2009,
```