

COBRA & Direct Billing EPM Import Specification

Version 1.2026

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Introduction

The Eligible Plan Member (EPM) Import system was designed to allow for the easy importation of EPM information into the COBRA & Direct Billing system. The system utilizes a Comma Separated Values (CSV) import text file to input information about an EPM. 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 EPMs into the system. It is not written to fully explain the EPM fields or define imports other than the EPM 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.

Eligible Plan Member

An Eligible Plan Member (EPM) is a current employee that is not yet receiving COBRA benefits.

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, it is assumed 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.

Line Identifier

Each text line that is imported must have a line identifier as its first field, see [Import File Layout](#) for more information. This line identifier defines which fields come next on the text line.

Import File Layout

The EPM Import file is a CSV file where each line has values separated by commas. 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 EPM record you will need a EPM line that starts with a line identifier of “[EPM]” and may appear similar to the following:

[EPM],111223333,223,MyClientName,MyClientDivisionName,Bob,L,Jones,MR,bjones@test.com,,,...(etc).

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

Line identifiers and their definitions are as follows:

Line Identifier	Required to Complete a EPM	Description
[EPM]	☒	The main EPM record

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 EPM 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

[EPM]

Column Name	Data Type	Required	Description
SSN	SSN	☒	
ClientName	Text - 100	☒	
ClientDivisionName	Text - 50	☒	
FirstName	Text - 50	☒	
LastName	Text - 50	☒	
Email	Email		
Phone	Phone		
Address1	Text - 50	☒	
Address2	Text - 50		
City	Text - 50	☒	
StateOrProvince	Text - 50	☒	
PostalCode	Text - 35	☒	
Sex	Sex	☒	F, M, U, Male, Female, Undisclosed
SendGRNotice	Boolean		Optional: Defaults to TRUE. If omitted, the field defaults to TRUE which has always been the behavior. Set to FALSE if you wish for this EPM to NOT send the General Rights notice.
HireDate	Date	Situational	Required if EPM with the same SSN exists. Null is valid.

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 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 @.

Sample Import File

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

```
[VERSION],2.0
[EPM],552552222,1,TestClient1,TestClient1Division,Bob,Z,Jones,MR,bjones@test.com,4024445555,,1234 Some
street,,Omaha,NE,68123,,M,T,F,F
[EPM],552553333,1,TestClient1, TestClient1Division,Walter, ,Smith,MR,wsmith@test.com,4024445552,,12343
Some street,,Omaha,NE,68123,,M,T,F
[EPM],333442222,2,TestClient1, TestClient1Division,Jorge,R,Rejo,MR.,test3@test.com,4444445555,,123 apt b
str,,omaha,ne,68111,,F,T,F,T
```