Add insurance data to employee records

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Personnel > Maintenance > Staff Demo > Insurance

Ensure that each employee has updated insurance data on the Personnel > Maintenance > Staff Demo > Insurance tab. You can manually enter the data or use the Personnel > Utilities > Import Staff Demo Insurance Data page to import the insurance data from a file provided by a third-party administrator or an enrollment vendor.

Retrieve an existing record	Begin typing the employee name or number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee and click **Retrieve**. Or, click **Directory** to perform a search in the Employees Directory. **Note**: The employee autosuggest field includes employees whose records were created in Personnel but do not have a Pay Info or Job Info record. If the employee number does not exist in the system, a message is displayed prompting you to create a new employee. Click **Yes**.

❏ Click **+Add** to add a row.

Field	Description
Company	Click ⌄ to select an insurance company.
Plan Number	Type or click ⋮ to select a plan number for the selected insurance company. Or, press the SPACEBAR to view a list of available plan numbers.
Plan Type	Click ⌄ to select a plan type to include the appropriate individuals.
Employee Insurance ID	Type the insurance ID for the employee. The field can be a maximum of 20 digits and is optional.

❏ Under **Individuals Covered**, click **+Add** to add a row for each individual, including the employee covered by the selected plan in the top grid.

It is recommended that you leave the **Coverage End Date** field blank until an individual is no longer covered by the plan. This will tell the system to assume this coverage is active until you put a set date in and therefore, keep you from having to manually update the coverage dates each year.

❏ Click **Save**.