



## **Add insurance data to employee records**



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


## Add insurance data to employee records

[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.

<b>Retrieve an existing record</b>	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 <b>Retrieve</b> . Or, click <b>Directory</b> to perform a search in the <a href="#">Employees Directory</a> . <b>Note:</b> 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 <b>Yes</b> .
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Click **+Add** to add a row.

Field	Description
<b>Company</b>	Click  to select an insurance company.
<b>Plan Number</b>	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.
<b>Plan Type</b>	Click  to select a plan type to include the appropriate individuals.
<b>Employee Insurance ID</b>	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. **This information is available from B-Swift.**

**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**.