



body

Table of Contents

body i

Retrieve an existing record	<p>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.</p> <p>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.</p>
------------------------------------	---

☐ 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 family members.
Employee Insurance ID	Type the insurance ID for the employee. The field can be a maximum of 20 digits. This field is optional.

Under **Individuals Covered By:**

☐ Click **+Add** to add a row for each individual (including the employee) covered by the selected plan in the top grid.

SSN	Type the nine-digit social security number of the family member covered by the employee's insurance policy.
DOB	Type the family member's date of birth in the MMDDYYYY format.
Relation	Click ▼ to select the relationship of the dependent to the employee.
First Name	Type the first name of the dependent. The field can be a maximum of 17 characters.
Middle Name	Type the middle name of the dependent. The field can be a maximum of 14 characters.
Last Name	Type the last name of the dependent. The field can be a maximum of 25 characters.
Gen	Click ▼ to select a generation code for the covered individual.
Coverage Begin	Type the date that the insurance coverage begins in the MMDDYYYY format.
Coverage End	<p>Type the date that the insurance coverage was terminated in the MMDDYYYY format.</p> <p>If the insurance coverage is still active, leave this field blank.</p>

☐ Click **Save**.