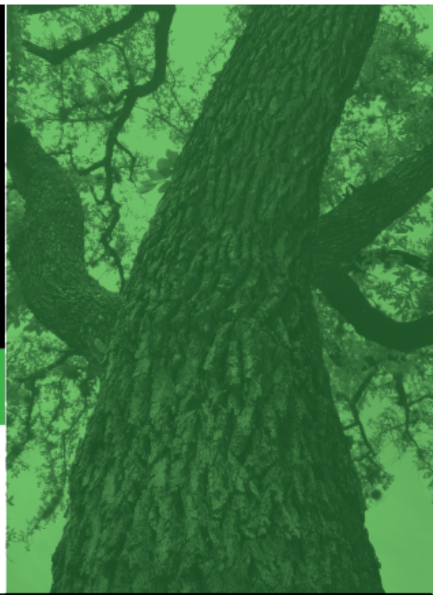
ASCENDER
ELEVATING TECHNOLOGY SOLUTIONS

ASCENDER GUIDES



Insurance - HRS3000

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Personnel > Maintenance > Staff Demo > Insurance

This tab contains insurance information for the employee. The data includes the insurance company, the plan type, coverage information, the individuals covered by the plan, and the demographics of the covered dependents.

Since ACA is reported over a calendar year, some employees may have multiple rows if they changed insurance companies during the last enrollment period and you added insurance codes for each plan.

If this data is maintained throughout the calendar year for all applicable employees, you can use the Personnel > Utilities > Extract Insurance Data to 1095 Data page to extract insurance data from this tab to the Personnel > Maintenance > ACA 1095 YTD Data maintenance page(s). Most data will populate accurately; however, there are some records that may require manual edits.

Add insurance data:

Retrieve an existing record.	Search for a 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.

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.

Under **Individuals Covered By**:

Click **+Add** to add a row for each individual 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	Type the date that the insurance coverage was terminated in the MMDDYYYY format. If the insurance coverage is still active, leave this field blank.

Click **Save**.

Other functions and features:

Retrieve	Retrieve data. The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
	View additional information. Click to view additional details for a selected row.
	Delete a row. Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.
Documents	View or attach supporting documentation.