



## Set up insurance company codes table



# Table of Contents



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[Personnel](#) > [Tables](#) > [Insurance Company Codes](#)

Add codes for health insurance plans.

**Note:** It is not necessary to add separate codes for each health insurance plan since you can see the current detail in their deduction screens.

|            |  |    |                                     |   |
|------------|--|----|-------------------------------------|---|
| <b>Add</b> | Click to add insurance company data. A blank insurance company code record is displayed. | OR | <b>Retrieve an existing record.</b> | Click  to search for and select an insurance company code. Or, begin typing the insurance company code or name. As you type the data, a drop-down list of corresponding data is displayed. Select an insurance company code or name and click <b>Retrieve</b> . |
|------------|--|----|-------------------------------------|---|

☐ Under **Insurance Company Codes:**

| Field               | Description   |
|---------------------|---|
| <b>Company Code</b> | Type the code associated with the insurance company. The field can be a maximum of five digits.                   |
| <b>Company Name</b> | Type the name of the insurance company. The field can be a maximum of 30 characters.                              |
| <b>Street Nbr</b>   | Type the street number of the insurance company. The field can be a maximum of six digits.                        |
| <b>Street Name</b>  | Type the street name of the insurance company. The field can be a maximum of 20 characters.                       |
| <b>City</b>         | Type the name of the city in which the insurance company is located. The field can be a maximum of 25 characters. |

| Field               | Description   |
|---------------------|---|
| <b>State</b>        | Click ▼ to select the two-character abbreviation of the state in which the insurance company is located.  |
| <b>Zip Code</b>     | Type the five-digit zip code that indicates the location of the insurance company.                        |
| <b>+4</b>           | Type the four-digit additional zip code indicating the location of the insurance company.                 |
| <b>Phone Number</b> | Type the three-digit area code and seven-digit phone number of the insurance company.                     |
| <b>Extension</b>    | Type the phone number extension, if applicable.   |
| <b>Contact</b>      | Type the contact name associated with the insurance company. The field can be a maximum of 30 characters. |

☐ Under **Insurance Plans**, click **+Add** to add a plan number, description, and group number. The system populates the **Code** and **Company Name** fields with data from the selected company.

|                         |  |
|-------------------------|--|
| <b>Plan Number</b>      | Type the insurance plan number. The field can be a maximum of 20 digits.   |
| <b>Plan Description</b> | Type the description of the type of insurance plan. The field can be a maximum of 20 characters.   |
| <b>Group Nbr</b>        | Type the group number for the district. The field can be a maximum of 20 digits.   |
| <b>Self-Insured</b>     | <p>Select to identify the health insurance plan as being a plan in which the employer assumes the financial responsibility for providing health care benefits to its employees.</p> <p>This field should be selected for PPO plans (e.g., TRS ActiveCare 1-HD, 2, and Select plans).</p> |

☐ Click **Save**.



## Back Cover