



Add or update staff insurance data

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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.

Insurance									
Delete	Company Code	Company Name	Plan Number	Plan Description	Plan Type	Employee Insurance ID			
		AETNA	028	ACTIVECARE 1-HD	C Emp and children	<input type="text"/>			
Rows: 1									
Individuals Covered By: 028 - ACTIVECARE 1-HD									
Delete	SSN	DOB	Relation	First Name	Middle Name	Last Name	Gen	Coverage Begin	Coverage End
	123-45-6789	07-06-1978	E - Employee self	Adam	E	Adams		01-01-2019	00-00-0000
	555-55-5555	10-24-2009	C - Child	Caden		Adams		01-01-2019	00-00-0000
Rows: 2 of 2									

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 .
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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	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**.



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