



Add insurance data to employee records

Table of Contents

Add insurance data to employee records

[Personnel](#) > [Maintenance](#) > [Staff Demo](#) > [Insurance](#)

Add the appropriate insurance details to all applicable employee records.

- Retrieve the employee record.
- Click +Add to add a row for the insurance company the employee selected for the school year. Since ACA is reported over a calendar year, the employee may have multiple lines if they changed insurance companies during the last enrollment period and you built insurance codes for each plan. Hitting your space bar in the Company Code field will activate a dropdown list from which you may choose.
- Use the ellipsis to the right of the Plan Number field to select from available Plan numbers
- Select the Plan Type the employee chose (Employee Only, Employee and Spouse, Employee and Family, Employee and Children)
- The Employee Insurance ID field is optional.
- In the Individuals Covered section, add rows for each individual covered by the insurance plan referenced, including the employee. This information is available from B-Swift.
- We recommend leaving the Coverage End Date blank until an individual is no longer covered by the plan. (Scroll to the far right in the Individuals Covered area.) 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.

Save all changes.



Back Cover