



Add insurance data to employee records

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Ensure that each employee has updated insurance data on the [Personnel > Maintenance > Staff Demo > Insurance](#) tab. You can manually enter the data or use the [Personnel > Utilities > Import Staff Demo Insurance Data](#) page to import the insurance data from a file provided by a third-party administrator or an enrollment vendor.

- 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.

☐ Click **Save**.



Back Cover