



# insurance



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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:


<b>Retrieve an existing record.</b>	<a href="#">Search for a record.</a> 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 <b>Retrieve</b> . Or, click <b>Directory</b> to perform a search in the <a href="#">Employees directory</a> .
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Click **+Add** to add a row.

Field	Description
<b>Company</b>	Click  to select an insurance company.
<b>Plan Number</b>	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.
<b>Plan Type</b>	Click  to select a plan type to include the appropriate family members.
<b>Employee Insurance ID</b>	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.

<b>SSN</b>	Type the nine-digit social security number of the family member covered by the employee's insurance policy.
<b>DOB</b>	Type the family member's date of birth in the MMDDYYYY format.
<b>Relation</b>	Click  to select the relationship of the dependent to the employee.
<b>First Name</b>	Type the first name of the dependent. The field can be a maximum of 17 characters.
<b>Middle Name</b>	Type the middle name of the dependent. The field can be a maximum of 14 characters.

<b>Last Name</b>	Type the last name of the dependent. The field can be a maximum of 25 characters.
<b>Gen</b>	Click  to select a generation code for the covered individual.
<b>Coverage Begin</b>	Type the date that the insurance coverage begins in the MMDDYYYY format.
<b>Coverage End</b>	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:

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



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