

Save and Add a Dependent

When you choose the **Save and Add Dependent** button after entering the employee's demographic information, you will then advance to the Add a dependent screen for entering the dependent's demographic information.

WEB ENROLLMENT TRAINING
January 1, 2008-December 31, 2008

Main Menu
Change Company
Find Employee Record
Add New Employee
Log Out

Add a dependent for Sample, Adam

New Dependent Information

Demographics

____ - ____ - ____ _____
Social Security Number Member Number

____ _____ _____
First Name Middle Name Last Name

____ _____
Relationship to Employee Date of Birth

____ _____
Gender Dependent Status

Coverage Information

____ _____
Other Insurance? Insurance Details (up to 250 characters) 250

Home Address

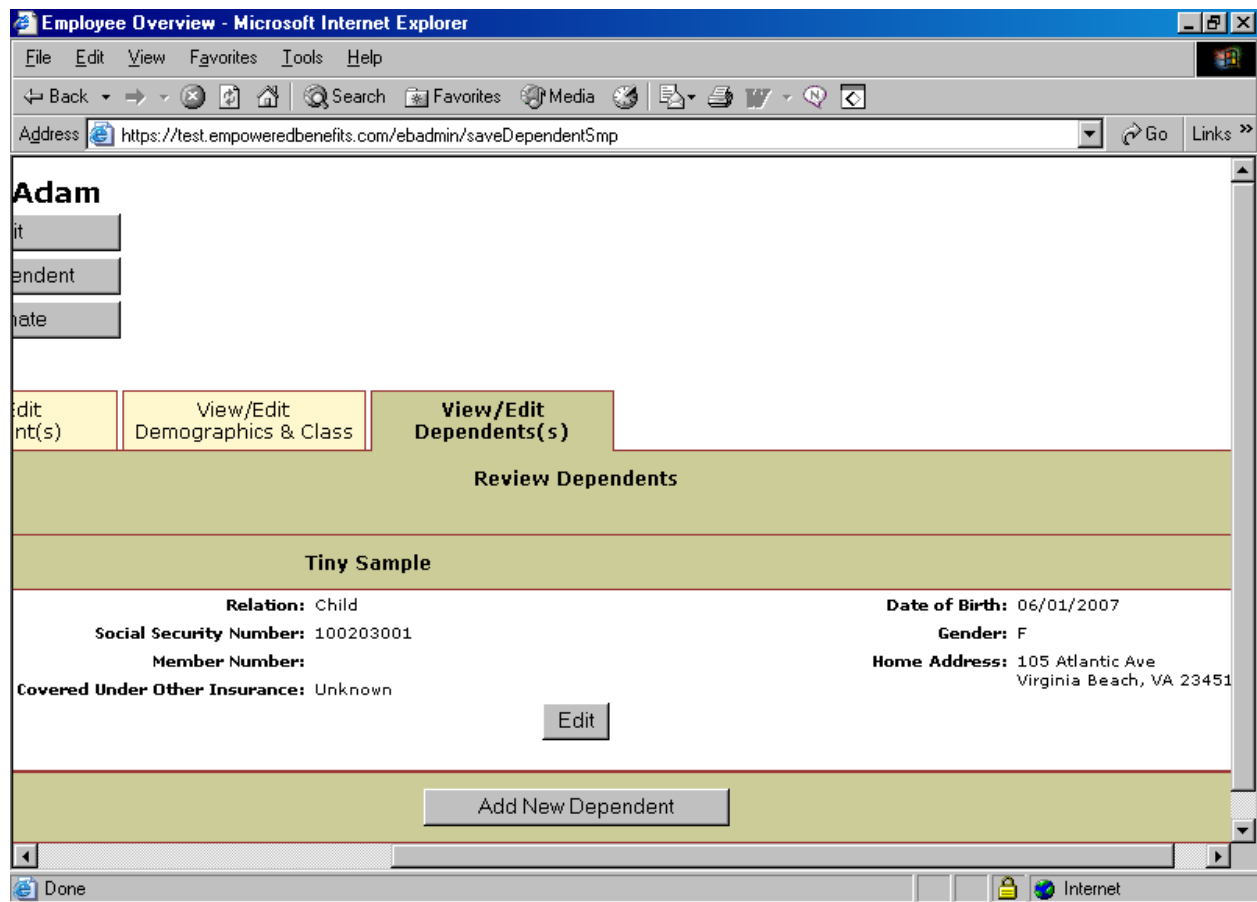
____ _____ _____
Address 1 Address 2 City

- Enter the employee information.
 - **SSN** = Enter the 9 digit SSN number (**note**: any employee entered with a SSN# that starts with 999 will be considered test data and will not appear on any report or be transmitted to Optima Health for enrollment.) ***Required**
 - **Member Number** = Optima Health will supply member number
 - **First Name** = Employee First Name ***Required**
 - **Middle Name** = Employee Middle Name or Initial Requested
 - **Last Name** = Employee Last Name ***Required**
 - **Suffix** = Select the correct Suffix for the member (i.e. SR, JR, etc). The field display defaults to "Not Applicable". Select the Down arrow to display other options.
 - **Maiden Name** = Not required
 - **Relationship to Employee** = Spouse, Child, Stepchild ***Required**
 - **Date of Birth** = Enter employee date of birth (MM/DD/YYYY) ***Required**
 - **Gender** = Click on down arrow and select either "male" or "female"
 - **Dependent Status** = Student or Handicapped Status
 - **Other Insurance** – Drop down box that display "Unknown", "Yes", or "No"
 - **Insurance Detail** – If member has other insurance please include the insurance name. (i.e. Champus, Tricare, etc.)

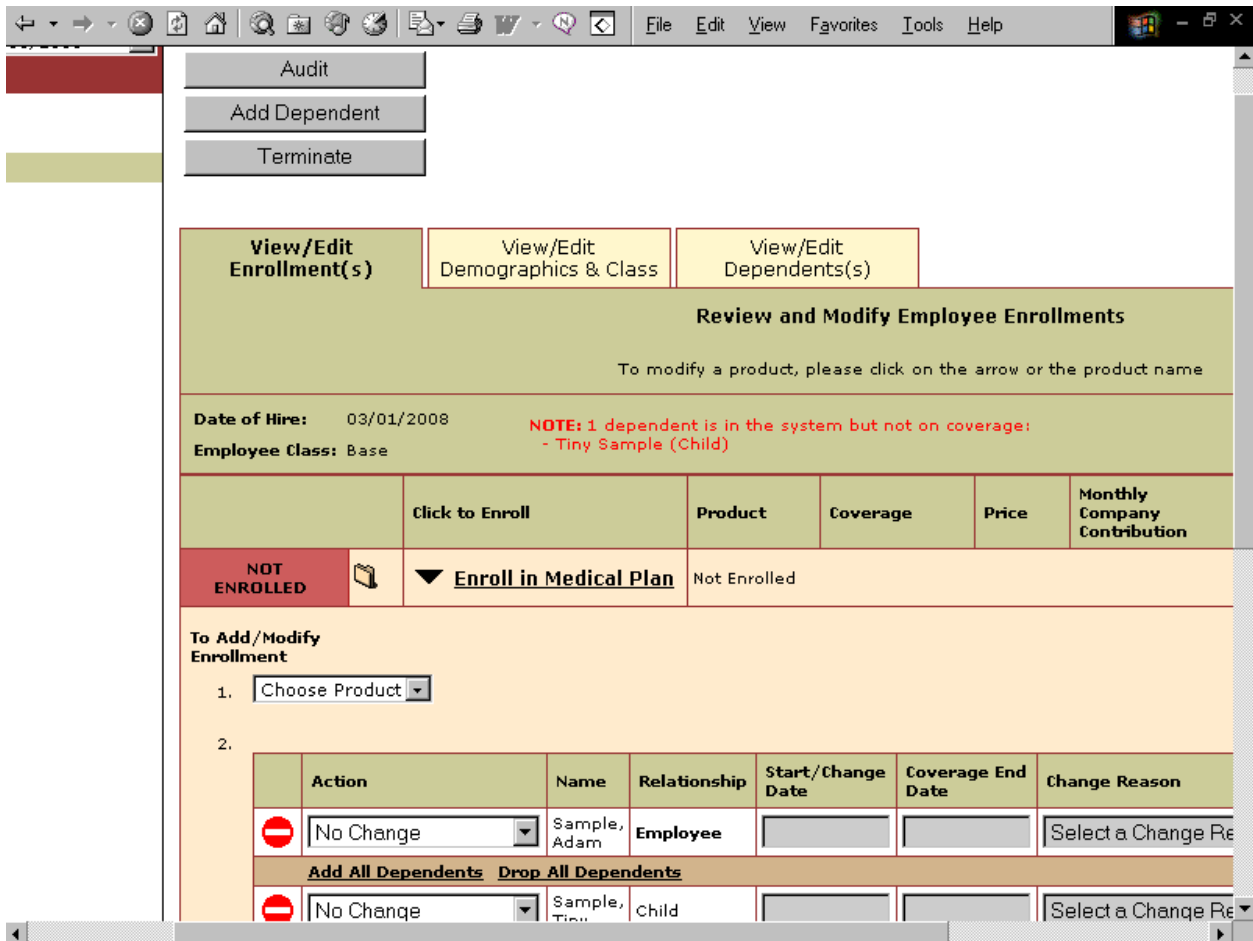
- **Home Address Fields** – Auto fills with Employee’s Address. Enter the dependent’s address if different from Employee’s Address
- **Work Address Fields** - Not required
- **Home E-Mail** – Not required
- **Home Phone** – Not required but will assist Member Services to Contact Member if necessary. Format is 757-999-9999 (Note: The area code is a required field)
- **Fax Number** - Not required
- **Work E-Mail** – Not required
- **Work Phone** – Not required

Add A Comment – This is a free text field that is used to add notes about the enrollment and will also be used to capture Coordination of Benefits information. The benefits administrator would include a comment to indicate that the employee is being added to the plan due to “loss of coverage”, “status change from part time to full

Save by hitting the Add Dependent button at the bottom of the screen. You will advance to the View/Edit Dependents Tab. You may review the information, use the Edit button to Edit information or use the Add New Dependent to add another dependent.

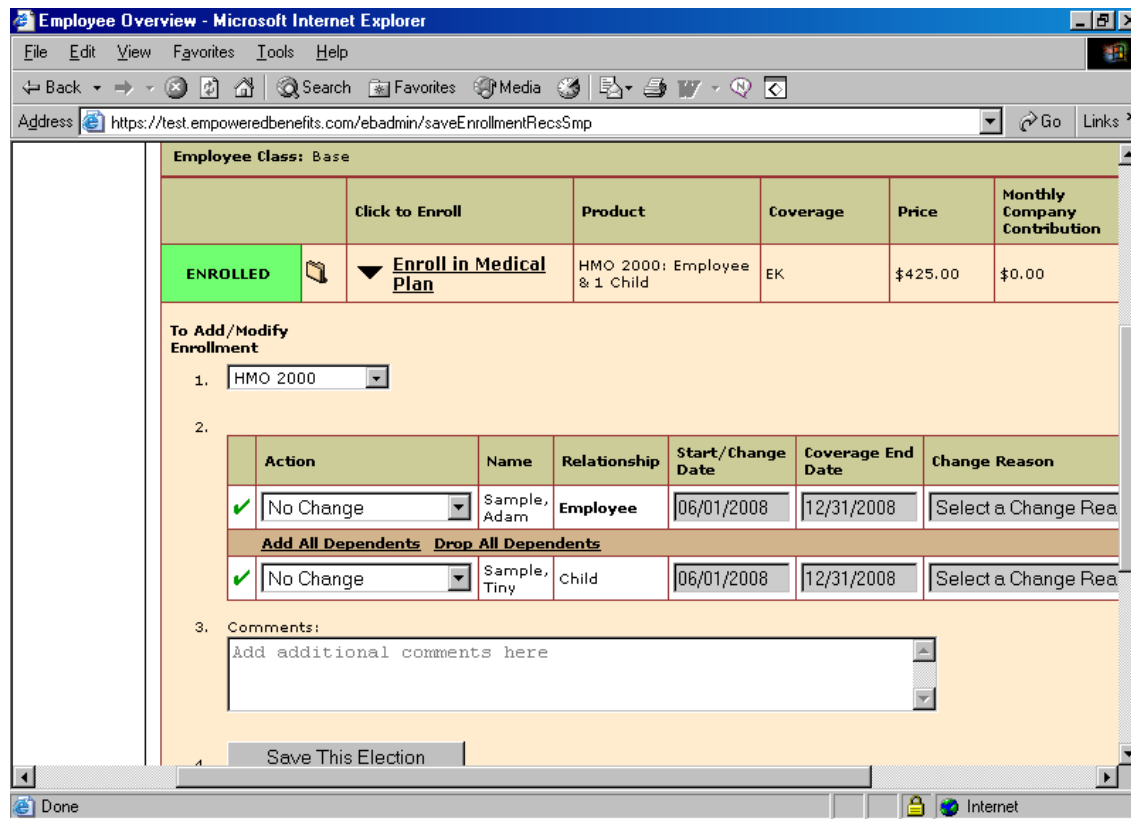


Once all necessary dependent information has been added, Choose the View/Edit Enrollments Tab.



1. Choose the Product by opening the scroll down box and choosing the appropriate plan. When you choose the plan it will highlight the fields for the employee that **must** be completed.
2. Action
 - Start/Change Date – The date Employee’s Insurance should begin.
 - If the Member enrolls on an HMO, POS, or POSA plan, they may choose a Primary Care Physician. Please enter the Physician’s number in the Primary Care Provider field. If no Physician number is entered, Optima Health will assign a Physician within the Employee’s home zip code if possible.
3. Comments – Free text area to note any information you wish to be able to view in future concerning the Employee or Dependent Enrollment
4. Save this Election – to save information and transmit to Optima Health.

If you choose to save the information, the screen will change to reflect in Green the Enrollment Status of Enrolled and will reflect the chosen plan, tier and cost.



Your Employee and dependent are now enrolled and you may return to the main Menu by using the link back to Main menu on the left side of your screen. You will notice that your newly enrolled member appears in your employee listing on the main menu.

