

# Residents/Fellows Insurance Database Guide

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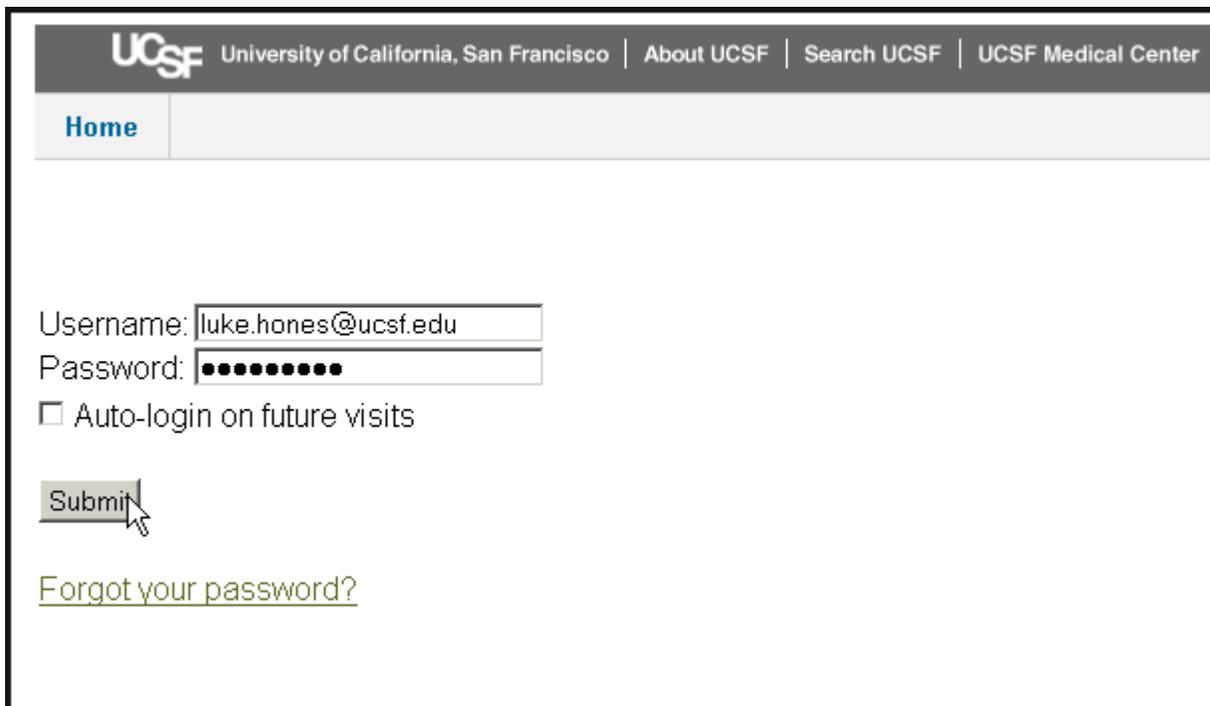
## Logging in

The insurance database system uses the same username login as in past years. Your username is your UCSF email and your initial password is the last 4 digits of your SSN. If you have problems logging in please contact the Resident/Fellows Benefits Analyst.

The URL is:

<https://myhr.ucsf.edu/index.php/r>

Once you've typed in your username/password, select submit.



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Home

Username:

Password:

Auto-login on future visits

Submit

[Forgot your password?](#)

## Once logged in (Roster)

Top menu:

1. The roster is your home page
2. The Request form is a form for individual requests
3. View Draft Requests is where you view requests you have made but did not have all the required information to complete the transaction.
4. Request Actions is a record of all requests you have made
5. Open enrollment batch processing will be open only during Open Enrollment

## Request Form

Select Enrollment/Change Enrollment or Terminate, and select a submenu.

<i>Residents and Fellows Benefits Form</i>		
Enrollment <input type="radio"/>	Change Enrollment <input type="radio"/>	Terminate <input type="radio"/>
Add new enrollee and dependants or opt out of enrollment	Add or subtract dependant to existing enrollee or change address	Terminate Enrollment

As you type in an enrollee's name, a dropdown will appear based on your input.

<b>Residents and Fellows Benefits Form</b>				
Enrollment <input type="radio"/>	Change Enrollment <input checked="" type="radio"/>		Terminate <input type="radio"/>	
Add new enrollee and dependants or opt out of enrollment	Add or subtract dependant to existing enrollee or change address		Terminate Enrollment	
Add Dependent <input checked="" type="radio"/>	Cancel Dependent <input type="radio"/>	Change Address <input type="radio"/>	Opt Out <input type="radio"/>	Change Plans <input type="radio"/>
Enrollee	<input type="text"/>	ac		
Current Program	<input type="text"/>	ACHARYA,APPLE (028754953) ACHARYA,ORANGE (026483282) ACHARYA,PEAR (029765184) ACORN,MARK (023679251)		

Depending on the form you chose, you will have fields to, add dependents, term dependents, change begin and end dates, change the enrollee address (based on E\*Value or Payroll addresses). If it's a new enrollment you will identify the health plan, dependents, begin and end dates, etc. During Open Enrollment you will be able to use the Switch Plan function.

All enrollees must have a California address and Social Security Number in our systems in order for their enrollment to be processed. The California address must either be in the payroll system or E\*Value. The Social Security number must be in the payroll system. You will have the option to save the transaction as a draft if you do not have the required information.

When you have completed the form, check the agree to terms box and submit or save a draft.

Below are the current California addresses in Payroll and/or E\*Value.  
 Select an address to change the address on plans.  
 If you do not see the correct address, please update Payroll or E\*Value.  
 These changes will be available on this form in about 48 hours.

2525 24TH STREET, SAN FRANCISCO, CA, 94110 (Payroll) ▼

**Payroll Address**

**Confirmation:**  
 I am authorized to request the changes on this form for the enrollee listed. I understand that I am subject to discipline, up to and including termination, if I request unauthorized changes to benefits for an enrollee in this system.

I agree to these terms.

You will be routed to the transaction detail page, where the information from your form will be entered for review or printing. This is also the view the benefits desk has of your request. You must be logged on to the database to see the "Transaction Detail" if you are not you will only see the "Home" icon.

Transaction Detail	
Transaction ID	024607772-41910801
Transaction Type	Add Dependent
Sent To	<a href="#">Sharon Mendonca</a> (415) 476-6529
Status	Submitted
Last Action Date	5/9/2012 05:05 PM
Last Action By	<a href="#">Sandria Wong</a> (415) 476-1575
Original Submitter	<a href="#">Sandria Wong</a> (415) 476-1575

## Request Actions

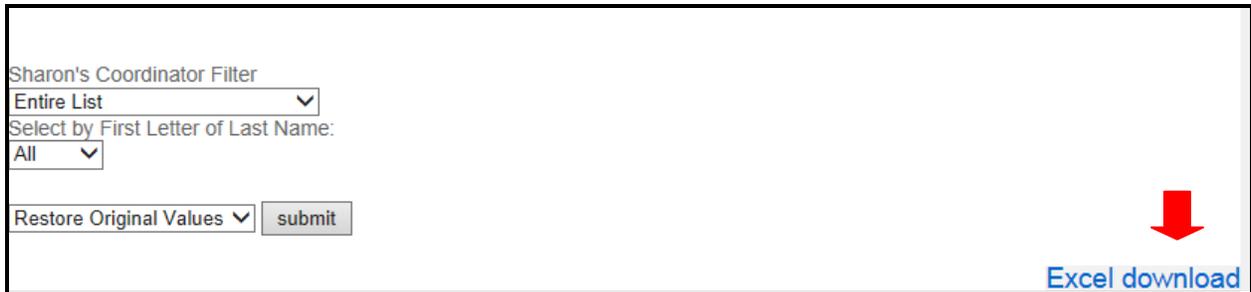
The transaction is listed with other transactions on the "Request Actions" page.

LANG,ROBERT	Add Dependent	Submitted	WONG,SANDRIA	19.9
LESSMAN,GREG	Term Enrollment	Submitted	VERDE,SUSAN	11.8
MARCO,PAUL	Add Dependent	Submitted	RATTI,CATHERINE	3.8
BROOK,CATHY	OE Continue	Under Review	PLISKA,LAURA	0.0

## Open Enrollment Actions

Open Enrollment batch action dropdown and Excel download:

Just below and to the right is an Excel download link:

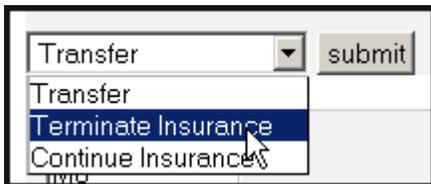


Sharon's Coordinator Filter  
Entire List  
Select by First Letter of Last Name:  
All  
Restore Original Values submit

[Excel download](#)

To the left is a dropdown for batch actions. This menu is not available during the rest of the year.

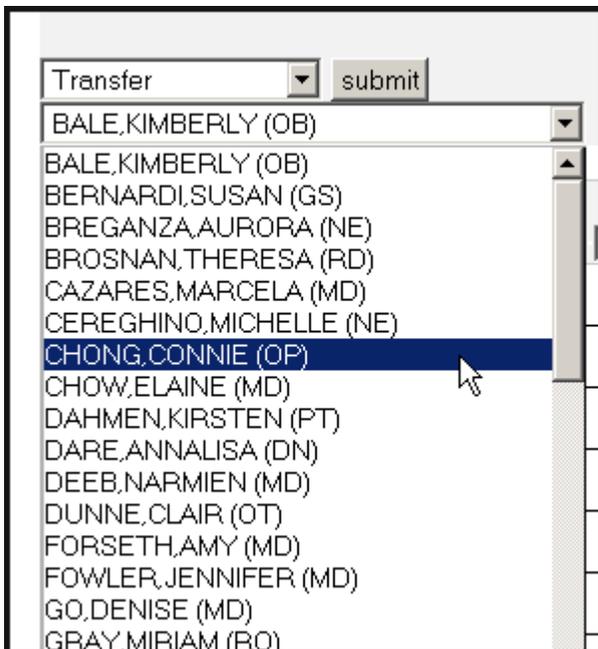
You can term or continue multiple subscribers. Terminating sets the end date to 6/30/YYYY of the current year unless you change it. Continuing sets the date to a year from the current end date.



Transfer submit  
Transfer  
Terminate Insurance  
Continue Insurance

There is also a Transfer selection. If you need to transfer a subscriber to another coordinator, select this.

A dropdown of coordinators appears below the batch action dropdown. Select the coordinator you will be transferring to.



Transfer submit

BALE,KIMBERLY (OB)  
BALE,KIMBERLY (OB)  
BERNARDI,SUSAN (GS)  
BREGANZA,AURORA (NE)  
BROSNAN,THERESA (RD)  
CAZARES,MARCELA (MD)  
CEREGHINO,MICHELLE (NE)  
CHONG,CONNIE (OP)  
CHOW,ELAINE (MD)  
DAHMEN,KIRSTEN (PT)  
DARE,ANNALISA (DN)  
DEEB,NARMIEN (MD)  
DUNNE,CLAIR (OT)  
FORSETH,AMY (MD)  
FOWLER,JENNIFER (MD)  
GO,DENISE (MD)  
GRAY,MIRIAM (RO)

Selecting records to batch actions:

You can select a record for batch action by clicking on the records row with your mouse.

A selected record turns yellow, and the checkbox to the right is checked. If you are terminating or continuing you can also change the record's end date.

You can deselect the same way. Once you have selected records for a batch action you can press the submit button.

Transfer		submit								
BALE,KIMBERLY (OB)				<a href="#">Excel download</a>						
Name / ID	Active	Plan	Start	End	Program	Coordinator	Status	Status Date		
Mo	Filter: All	Filter: All			Filter: All	Filter: All	Filter: All			
MOAR,ROBERT (02347854921)	A	H	07/01/10	06/30/12	FRAA	RUELAS,D	Open Enrollment	05/22/12	<input type="checkbox"/>	
MOBLEY,CHRIS (029876254)	A	H	07/01/10	06/30/12	FRAA	RUELAS,D	Open Enrollment	05/22/12	<input checked="" type="checkbox"/>	
MOCABY,DAVID (027493156)	A	B	06/19/08	06/30/12	FRAA	RUELAS,D	Open Enrollment	05/17/12	<input type="checkbox"/>	
MOCCO,JULIE (027468218)	A	B	06/21/07	06/30/12	MDROT	RUELAS,D	Open Enrollment	05/22/12	<input checked="" type="checkbox"/>	
MOON,JUNE (027154395)	A	B	07/01/06	06/30/12	MDROT	RUELAS,D	Open Enrollment	05/22/12	<input type="checkbox"/>	

Once you have submitted, the record is no longer available for batch action.

Terminated records are grayed out with an "X" in the "Active" field, the enrollment will not be able to be change.

WHEATMAN,RAY (029578319)	A	H	07/01/10	06/30/13	OBUK	ROTANDI,C	Request	05/29/12
YEE,DAVID (029864839)	A	H	07/01/10	06/30/13	OBUK	ROTANDI,C	Request	05/29/12
DIAZ,ROSIE (029811476)	X	H	07/01/10	06/30/12	OBUK	ROTANDI,C	Request	05/29/12

Other Roster Features:

You can filter the Enrollees by name by typing in the beginning of the name in the column filter. Clicking on the column name sorts the column. Other columns have dropdown filters.

Name / ID	Coordinator
Mu	Filter: All
MU,ROBERT(026856435)	Filter: All
MUGGS,JOEY (024556881)	B
MUKA,MAY (026846992)	B
MUKHTAR,JENNIFER (021133311)	B
MUKHTAR,SAMUEL (024488732)	B
MUNI, JUNE-MAY ROBERTS (029873573)	B

You can check details of an enrollee's record by selecting the name link. The details will open in a new window. Click on the transaction number to see detailed information.

Name / ID	Active	Plan	Start
<input type="text" value="ohl"/>	<input type="text" value="Filter: All"/>	<input type="text" value="Filter: All"/>	
<u>OHLEMACHER, DAVID JAMES</u> <u>(029867593)</u>	A	H	07/01/11

**COORDINATOR(S)**  
[BROSNAN, THERESA](#) RDNMU - NUC MED: ACGME

**SUBSCRIBER DATA**

Status: A  
Change Status: CURRENT  
Change Date: 05/10/12  
Name: OHLEMACHER, DAVID JAMES (029867593)  
Gender: M - Male  
Date of Birth: 06/011/1986  
Medical Plan: H - Healthnet  
Plan Begin: 07/01/11  
Plan End: 06/30/12

**DEPENDENTS**

Name	Gender	Date of Birth	Relationship
ROGERS, LIBBY	F - Female	07/01/1986	W - Wife
OHLEMANHER, MINDY	F - Female	12/02/2011	D - Daughter

**REQUEST HISTORY**

Transaction	Type	Status	Requester	Aging
<a href="#">027082049-17086145</a>	Change Plan	Completed 07/29/11	BROSNAN, THERESA	0.0 hours

## View Draft Request

You will be able to go to the View Draft Request section and update the record to either save as a draft or submit the request for enrollment

<i>Residents and Fellows Request Actions</i>					
Update Status <input type="button" value="Submit"/> <input type="button" value="submit"/>					
EMPLOYEE	TYPE	STATUS	REQUESTER	AGING (days)	
<input type="text" value="Filter: All"/>	<input type="text" value="Filter: All"/>	<input type="text" value="Filter: All"/>	<input type="text" value="Filter: All"/>	<input type="text" value="All"/>	
<a href="#">Steward, Marc</a>	New Enrollment	Draft	LO,EVA	1	<input type="checkbox"/>
<a href="#">Wells, James</a>	New Enrollment	Draft	LO,EVA	1	<input type="checkbox"/>
<a href="#">Davis, Willow</a>	New Enrollment	Draft	LI,KATHERINE	1	<input type="checkbox"/>