Student Health Insurance Administrative Functions

This work aid shows how to use the Student Health Insurance (SHI) management pages.

Step 1

Log into Catalyst using your UC credentials.
Step 2

Review/Update the content of the enroll/waive activity guide presented to students by following the breadcrumbs below.

If changes are needed, add a row on the Setup page by clicking the plus sign. The effective date will default to the current date:
On each of the following pages, review the text that will be presented to students and make any necessary changes. In particular, review the deadlines for submission of waiver information.

Example:

ALL UNDERGRADUATE AND GRADUATE STUDENTS, domestic or international, who register for six (6) or more credit hours or Co-op, are required to be covered by health insurance (military veterans may substitute their unlimited access to the VAMC for this health insurance mandate). All students who register for six (6) or more credit hours and/or Co-op will automatically be assessed single student coverage unless they have previously waived coverage (in that same academic year) or are covered under a UC Student Health Insurance dependent policy. Students who have been assessed insurance charges will be required to pay the charges unless an accurate Student Health Insurance Waiver is received by the Student Health Insurance Office by the 16th day of the semester. Students who enroll for our dependent coverage purchase and pay for the policy for an
Step 3

Review the eligibility codes that are used on the student’s record to indicate eligibility for health insurance by navigating to the breadcrumbs below.

Click Search for a list of existing codes:

Select the code you wish to review:
Step 4

Review the codes used by Tuition Calculation to determine how much should be assessed per term by navigating to the breadcrumbs below.

Click Search for a list of existing codes:

Select the code you wish to review:
Step 5

Add or update a student’s SHI enroll/waive information by navigating to the following breadcrumbs.

To search for existing SHI enroll/waive information, click on the Find an Existing Value tab.

- You can search by EmplID, Campus ID (UCID), National ID (SSN), Last Name, First Name or any combination of those fields.
- You must enter a value in at least one field in order to search.

To add a new Waiver, click on the Add a New Value tab.

Type in an EmplID and click Add.
You must enter the student’s EmplID in order to enter it here. You cannot search for the student on this page.

If you have the UCID, you can find the EmplID by clicking on the magnifying glass in the top right corner:

Type in the UCID and click Enter. The EmplID will come up and can be copied and pasted into the field.

Click Add if you are adding a student to the SHI enroll/waive page. If you have located an existing record for a student via the Find an Existing Value page, select the student. The Manage Student Health Insurance page will launch.
If there is no existing information for the student, the page will look like this:
If a record already exists for the student, the page will look something like this:

You can add a new term row, if necessary, by clicking the plus sign to the right of the Other Information link. Once you’ve done that, the page will look very similar to what it looks like when you clicked Add from the search page.

- The Other Information link will take you to a page that displays the student’s academic and citizenship information:
Click the Insurance link to go back to the Manage Health Insurance main page.

Indicate in the Accept/Decline field if the student is accepting or declining the SHI coverage.

- The date and time of the accept/decline is recorded here. If the student has completed the enroll/waive via self-service, that date/time will be used to determine if the student submitted the waiver by the deadline.
- Check Override to have the Tuition Calculation process ignore the Accept/Decline date.

If Decline is selected, enter the waiver information below.

In the Waiver Information section, add a new effective-dated row, if necessary, by clicking the plus sign to the right of the audited field. You will do this only if waiver information already exists for the term and you need to change it.

- The Approved flag defaults to Yes (checked).
- The Audited field defaults to No (unchecked) and will be updated when audit information is returned from the vendor.

The Optional Coverage section is where to indicate that the student is a grad or professional student with 1 or more enrollment units but fewer than 6 units and has opted in to SHI coverage. It is also where to indicate—in the Additional Coverage field—that the student has requested coverage for dependents.

**Step 6**

To view what the student sees when checking the status of his or her waiver, navigate to the following breadcrumbs.
You can search by EmplID, Campus ID (UCID), National ID (SSN), Last Name, First Name or any combination of those fields.
You must enter a value in at least one field in order to search.

In this example, a search by term returns three results. Select one to see the status:
**Student Health Insurance Waiver Status Check**

Below is the most recent Student Health Insurance waiver that we have on file for the 2017 academic year.

<table>
<thead>
<tr>
<th>Status</th>
<th>Approved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audited</td>
<td>No</td>
</tr>
<tr>
<td>Term</td>
<td>Fall Semester 2016</td>
</tr>
<tr>
<td>Most Recent Waiver Submission</td>
<td>06/13/2015</td>
</tr>
<tr>
<td>Name of Insurance Company</td>
<td>ACCESS PLUS (UTMB)</td>
</tr>
<tr>
<td>Customer Service Phone Number</td>
<td>800/555-1212</td>
</tr>
<tr>
<td>Policy or ID or Member #</td>
<td>xuj485484309</td>
</tr>
<tr>
<td>Name of Policyholder</td>
<td>John Henry</td>
</tr>
<tr>
<td>Relationship to Policyholder</td>
<td>Spouse</td>
</tr>
<tr>
<td>Covered Under Medicaid</td>
<td>No</td>
</tr>
<tr>
<td>Policy Purchased Through Employer</td>
<td>No</td>
</tr>
<tr>
<td>Name of Policyholder’s Employer</td>
<td></td>
</tr>
<tr>
<td>Student’s Email</td>
<td></td>
</tr>
</tbody>
</table>