

Copying a Benefit Plan when Creating a New Plan in AHR 2.0

When you are setting up a company's benefit plans, you can create a new plan but you also have the ability to copy a Benefit Policy/Plan from an existing plan.

Currently, when copying a benefit plan, the tool copies all the basic information and the rate data to the new plan as well as sets the dropdown fields for codes that already exist for the company (for example, Carrier, Agent, Classes. etc.).

Note: Remember, when copying a plan to another company, the only companies you can copy the plan to is a company that has been through the Payroll Data Cutover process into Advanced HR 2.0.

1. Go to **HR Admin - Benefits - Plans/Policies**.
2. Click on the green **Copy a New Policy / Plan From an Existing One** button (the middle icon) in the **Actions** column for the row you want to copy.



Plan Code	Plan Name	Start Date	End Date	Website URL
2019 MED	2019 MED	12/01/2018	07/01/2019	
DEN	2018 Dental	03/01/2018	02/28/2019	

3. The system displays the **Benefit Plan** details screen.
4. Make any necessary changes (including the **Company**, if required, and changing the **Code** and **Description**).
5. Click **Save** when complete.

Note: A note of caution before using this feature however. Give some thought as to whether copying a benefit plan to another company makes sense for your specific situation. This may work well in cases such as for one client who has very similar companies, perhaps franchises, or maybe a large company that has acquired some other companies and will share benefit plans between them. On the other hand, this may not make sense if the companies do not share the same benefit E/D codes, or other plan attributes.

Copying Carriers, Classes, General Agents, to Another Company

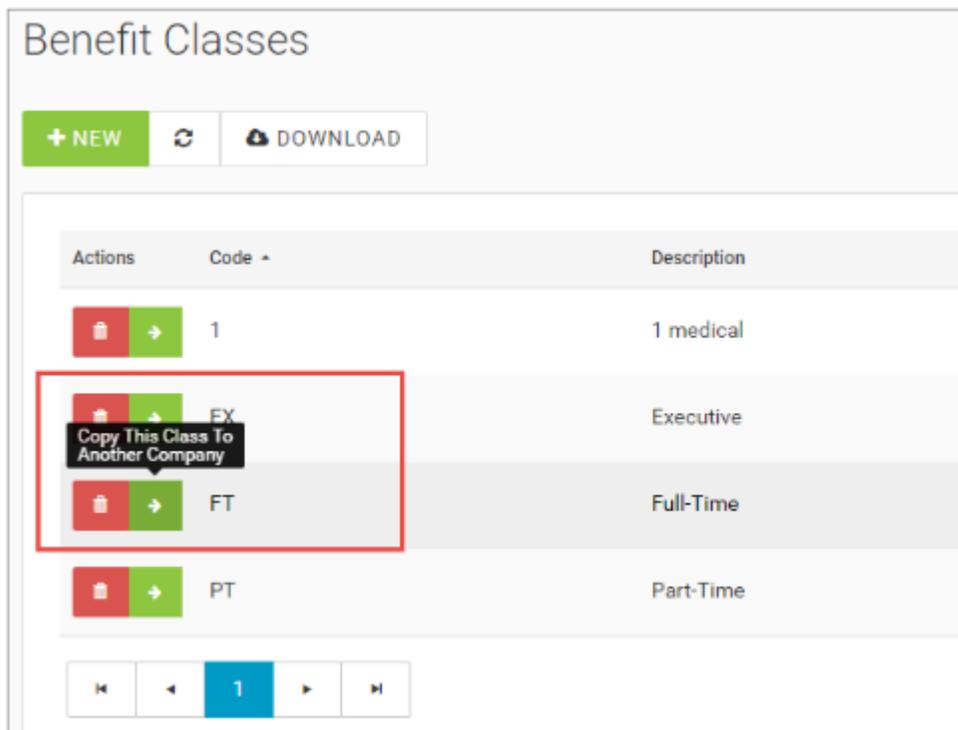
Instead of copying an **entire benefit plan to a new company**, you can also just copy the Carriers, Classes, Coverage Start Type, or General Agents from one company to another company.

The following benefits screens have the **Copy [] to New Company** button:

- Carrier Type
- Class List
- Coverage Start Type List (Waiting Rules)
- General Agent List

Note: A note of caution before using this feature however. Give some thought as to whether copying a benefit plan to another company makes sense for your specific situation. This may work well in cases such as for one client who has very similar companies, perhaps franchises, or maybe a large company that has acquired some other companies and will share benefit plans between them. On the other hand, this may not make sense if the companies do not share the same benefit E/D codes, or other plan attributes.

Here is an example of the **Copy This [] To Another Company** button on the **Benefit Classes** screen – the button on the right in the **Action** column.



When you click the **Copy This Class to Another Company** button, the system then displays the **Copy Class to New Company** dialog box:

✕

Copy Class To New Company

New Company

📄 Please Choose (Represents BLANK) ▼

COPY TO COMPANY

Select the **Company to copy the []** (**Class** in this example) to in the **New Company** dropdown and click the **Copy to Company** button.

Note: It's also important to remember that whenever copying plans, review ALL fields thoroughly before saving them. The plan details could be slightly different depending on the company.
