

INTERNATIONAL HEALTH INSURANCE

Policy and Procedure Overview

- 1. You will first generate a list of all UConn employees requesting International Health Insurance for their business travel.
 - This is done by logging into the Webform Responses and filtering the results to display travelers that are traveling internationally, then running the Macro to organize the results into an Excel file
- 2. You will then look at each traveler to see if they're eligible for International Health Insurance provided by the Travel office, or if they need to be contacted so we can receive more information about their trip. This is all done in the "Sent" Excel file. You will look for:
 - Students: they need to contact Global Affairs; we cannot provide health insurance
 - Non-employees: we must contact the Provost's office before processing their insurance
 - Employees on sabbatical: we must contact the Provost's office before we process their insurance
 - Personal days
 - We allow up to 3 personal days in the middle of a trip, or 6 personal days at the end or beginning of a trip to be processed
 - Any insurance for additional personal days they must purchase through CISI at <https://www.culturalinsurance.com/>
 - Cities not specified
 - We need to know exactly which city the traveler will be in
 - Multiple countries for one traveler
 - Each country the person is traveling to must be listed separately
- 3. For those travelers eligible to receive insurance, you will copy and paste their information in to the "of UConn-BT" Excel file.
 - Their phone number must be searched in UConn's directory
- 4. You will finally email travelers with any clarification questions or additional information regarding their international travel.
 - Many of these emails you'll send have to do with the eligibility of travelers to get a pass, listed in Step 2.

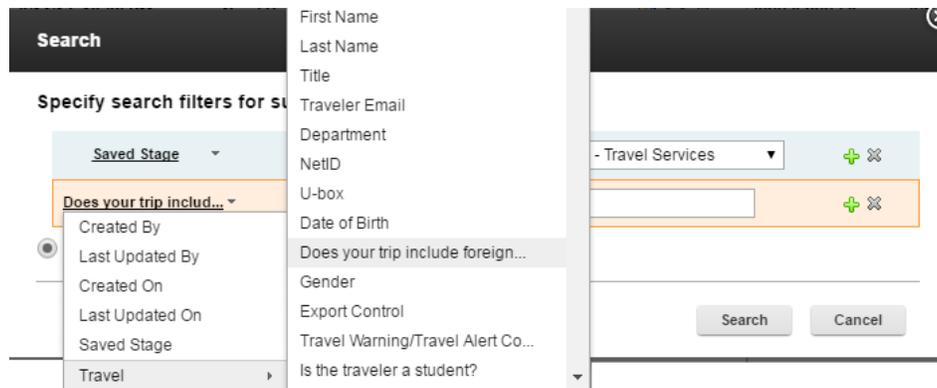
TO RUN THE MACRO:

This generates a list of all UConn employees traveling internationally that need health insurance.

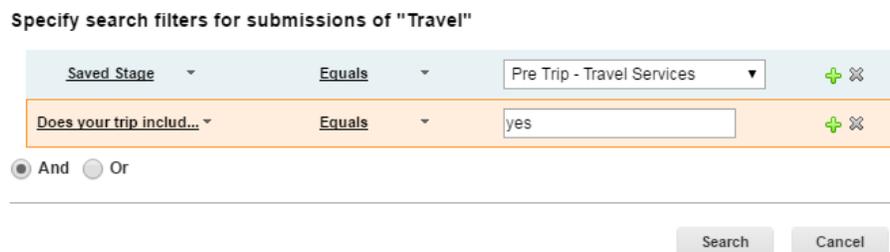
1. Go to travel.uconn.edu and click on Webform Responses.



2. Sign in with your NetID and password.
3. Click on "Create Filters."
4. Click "Select Item" and select "Saved Stage" from the list.
5. Under "Choose Operator" select "Equals."
6. Under the drop down menu, select "Pre Trip – Travel Services."
7. Click the green plus sign.
8. Click "Select Item," then go down to "Travel" and select "Does your trip include foreign travel."



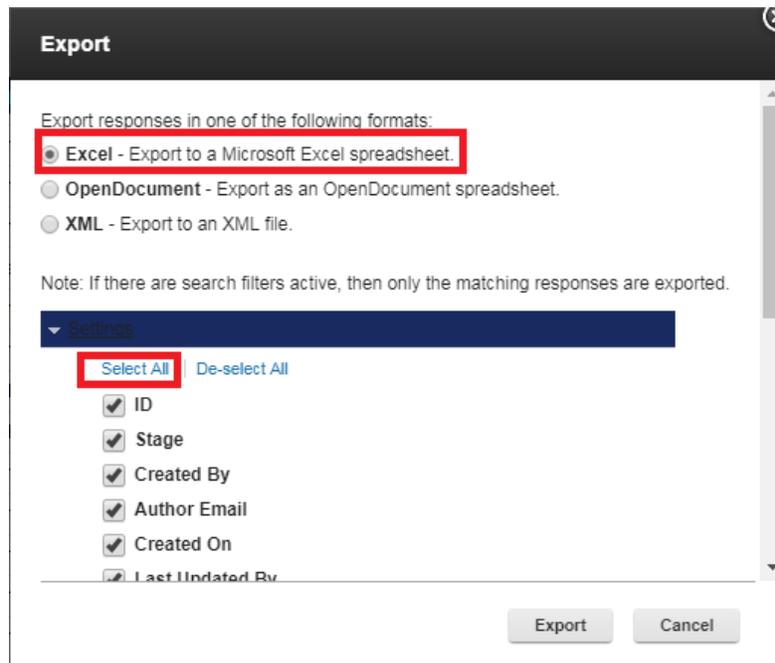
9. Under "Choose Operator" select "Equals."
10. In the text box, type in "Yes."
11. Make sure "And" is checked off at the bottom of the box, and click "Search."



This will now display the results of every traveler that is going internationally for business.

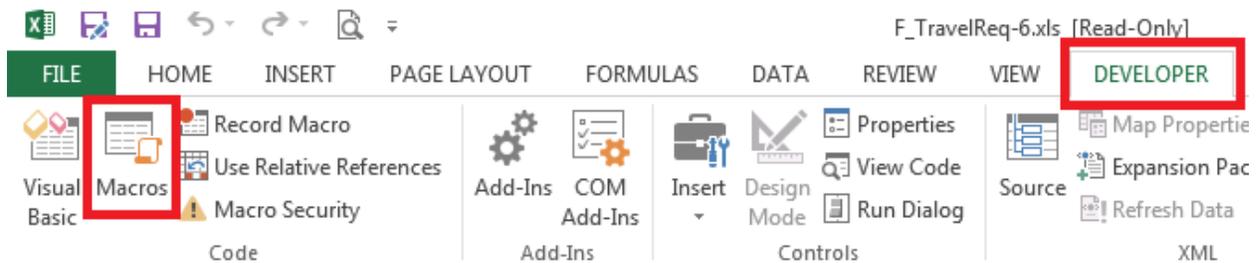
12. In the Q drive, go to AP → Travel → International Health Insurance → and open the Excel document "CISI.xlsm." This is the Macro.
13. On the Webform page, click "Export Data" and then select "Excel – Export to a Microsoft Excel spreadsheet" and then click the blue tab titled "Settings."

14. Click “Select All,” then click “Export.”



15. When prompted, select “Open with Microsoft Excel” and click “OK.” A new Excel document will open up.

16. In this new Excel document, click the “Developer” tab and then select “Macros.” When the Macro window pops up, click “Run.”



17. Close out of “CISI.xslm” and **DO NOT** save.

18. Highlight everything in Column H from box H3 down to the last country and shift it up a cell so that each country lines up with a traveler.

19. At the bottom of the Excel document, click the tab “F_TravelReq” and highlight all the cities in column FU from FU3 down to the last city.

20. Return to the tab titled “Enroll” and paste the cities into Column I so that they line up with the countries listed in Column H.

21. Save this document in the Q Drive under AP → Travel → International Health Insurance → Insurance Issued → The folder corresponding to this year (Example: "2019") → The folder corresponding to this month (Example: "October") as "Sent (Today's Date)."
22. Open the last updated document in this same folder. This document shows everyone that was processed for insurance last time.
23. Compare the new "Sent (Today's Date)" document with the "Sent (Last Time's Date)" document. Travelers highlighted the same color will have the same notes and circumstances applied to them.
 - a. *If a person was highlighted the same color as the majority of travelers:* highlight them in the new document from today (pick any color).
 - i. This means their insurance has been processed already, but they are still showing up in the Webform results because they need a Bradley parking pass.
 - b. *If a person was highlighted a different color than the majority:* find the first traveler in the list that was highlighted this same color, and look at the notes left about their trip.
 - i. *If the note says they require Bradley,* then highlight them in the new document from today the same color as the majority.
 - ii. *If they're highlighted red,* most likely the note will say that the traveler was contacted regarding their trip. Check the travel inbox and search for the person's name to see if they have responded with updated information.

red triangle indicates a note was left

[REDACTED]	06/27/1985	Female	2017-07-21	8/1/2017	Germany	Padderborn	
Rachael	08/25/1983	Female	2017-07-09	2017-07-12	United Kin	Oxford	
	02/16/1975	Female	2017-08-08	2017-08-13	Canada	Montreal	
Donald	11/11/1982	Male	2017-07-16	2017-07-21	Germany	Wadem	
	11/14/1962	Male	2017-07-09	2017-07-19	Korea, So	Jeju	
Anne	02/05/1983	Female	2017-07-27	2017-07-30	Canada	Toronto	
	10/17/1982	Male	2017-07-09	2017-07-17	Korea, So	Jeju	

orange highlighted a different color because the traveler is a student

the majority is highlighted light blue: these were previously processed in another report

24. Close out of the document of insurance that was sent from last time and keep open the one that was generated today.

Everyone that is now **NOT** highlighted in your list of travelers has newly submitted a travel form for international insurance. These are the travelers you will look into enrolling in international health insurance.

WHAT TO CHECK BEFORE ENROLLING TRAVELERS:

1. First, always look up the traveler’s phone number since this is required to enroll them in insurance.
 - a. In another internet tab, open the website <http://phonebk.uconn.edu/> and search for the first person in the “Sent (Today’s Date)” document for their phone number.
2. Also always click on the Travel Webform in the Webform Responses tab corresponding to the traveler you’re looking up. The Webform will provide more information about their travel than the “Sent (Today’s Date)” document does.

If they’re a student:

1. If the phonebook results say “Student,” then the traveler is not eligible for international insurance and you must email them to let them know they need to contact Global Affairs.
2. Scroll down in the traveler’s Webform to check if they requested a Bradley parking pass.
 - a. *If they did NOT request Bradley:* scroll down to the bottom of the page and click “Finalize and Do Not Send Email.”
 - b. *If they did request Bradley parking:* close out of the Webform.

The screenshot shows a webform titled "Travel Office Processing". On the left, under "Services Processed", there are two checkboxes: "Bradley Parking Pass" and "International Health Insurance", both of which are unchecked. On the right, under "The traveler requested", there is a list of services: "Bradley Parking Pass: Yes" (highlighted with a red box) and "International Health Insurance: Yes". Above this list, a red warning message reads: "Traveler has requested Bradley Parking - do NOT finalize the Webform. Close out of it." At the bottom, there is a section for finalizing the process with two radio buttons: "Finalize & Send Email" and "Finalize & Do Not Send Email".

3. In the “Sent (Today’s Date)” document,” highlight the traveler who is a student in any color and right click on their name to insert a comment noting that they’re a student and will not receive international health insurance through the Travel office.

If they are traveling domestically:

Sometimes travelers accidentally check off “Yes” to international travel when they’re really only traveling in the United States.

1. Scroll down in their Webform to check if they requested a Bradley parking pass.
 - a. *If they did NOT request Bradley:* scroll down to the bottom of the page and click “Finalize and Do Not Send Email.”
 - b. *If they did request Bradley parking:* close out of the Webform.
2. In the “Sent (Today’s Date)” document,” highlight the traveler in a different color and right click on their name to insert a comment noting that they’re not traveling internationally and will not need international health insurance.

If they have personal travel:

1. In their Travel Webform, if you see they indicated “Yes” for personal travel under any leg of the trip in the “Dates and Destination” box, you must determine if this is okay.

Region	Country	City	Personal Travel
Europe	France	Rouen	No
Europe	France	Paris	Yes
Europe	France	Paris	No

2. *If there are less than 6 personal days at the beginning or end of the trip:* you may process their insurance for the entire duration.
3. *If there are less than 3 personal days in the middle of a trip:* you may process their insurance for the entire duration.
4. *If there are more than 6 personal days at the beginning/end of a trip or more than 3 personal days in the middle of a trip:* you must subtract the number of personal days that are over the allowed amount from the end of the trip.
 - a. Adjust this in the “Sent (Today’s Date)” document” and insert a note indicating that it was changed.
 - b. Email the traveler to let them know they won’t be covered for the entire trip. If they want to be covered for the rest of their trip, they must purchase additional insurance through CISI.
 - i. Example: Hi Traveler, I’m contacting you to inform you that I just processed your international health insurance for your trip to City from Dates, however, we can only provide insurance for up to (3 or 6) personal days at the (end or beginning or middle) of a trip. Therefore, you will only be covered from Adjusted Dates. If you wish to purchase additional insurance for the remainder of the trip, you may do so through CISI at <https://www.culturalinsurance.com/>. Please let me know if you have any questions.
5. *If it’s noted that the entire trip is personal:* you must email the traveler to find out when they will be away for business and when they’re traveling for personal reasons.
 - a. Example: Hi Traveler, In order to process the international health insurance for your trip to City, could you provide me with the exact dates you’ll be away for business travel and which dates you’re taking as personal?
 - b. Highlight the traveler’s name in **RED** and leave a note indicating why you emailed them

If they’re also requesting a Bradley parking permit:

1. In their Travel Webform, if you see they indicated “Yes” for requiring a Bradley Parking Permit, highlight their name in the “Sent (Today’s Date)” document a different color and make a note that they requested Bradley parking.

If they’re traveling to multiple countries within the same trip:

Each country someone is traveling to must be processed separately.

1. In their Travel Webform, scroll down to the “Dates and Destinations” box to look at the specifics of their trip.
2. Adjust the dates in the “Sent (Today’s Date)” Excel sheet to show the exact dates that the traveler will be in each country.

how travel to multiple countries initially shows up

2017-06-25	2017-08-10	United Kin	Birmingham
		Armenia	Yerevan



how to properly adjust the dates in the Sent document

2017-06-25	2017-07-11	United Kin	Birmingham
2017-07-12	2017-08-10	Armenia	Yerevan

If the city needs clarification:

When processing insurance, we must know the exact city the traveler will be in for each country. If the traveler states “various” or doesn’t include a city, we must contact them.

1. Email the traveler asking for the specific cities they will be in during their trip.
2. Highlight the traveler’s name in **RED** and leave a note indicating why you emailed them
3. When they respond, adjust the city in the file. If they will be in multiple cities, they may be separated by a comma.

ENROLLING TRAVELERS:

1. In the Q drive, go to AP → Travel → International Health Insurance and open “Copy of Copy of UConn-BT.xlsx.” This is the template for what will be submitted for insurance enrollment of the travelers.
2. Save this file as “(Today’s Date) of UConn-BT”

You will now have open two Excel files: “(Today’s Date) of UConn-BT.xlsx” and the “Sent (Today’s Date)” document.

You will be transferring information from the Sent file into the UConn-BT file. ONLY names that are highlighted for Bradley parking or names that are not highlighted at all will be copied over into the UConn-BT file.

3. Starting with the first name in the Sent file, look up their phone number and paste it into Column R of the UConn-BT file.
4. Now copy and paste all the information for that traveler from the Sent file into the appropriate column in the UConn-BT file.
 - a. Copy and paste their name, Gender, Birthday, Start and End dates in Columns D-I

- b. Copy and paste their Country and City of destination in Columns M-N
 - c. Copy and paste their Email Address into Column Q
5. If someone is traveling to multiple countries, remember to enter each country and the specific dates they'll be in that country into a different row. Insurance needs to be processed separately for each individual country a person is traveling to.
6. Under Column J, "Enrollment Cell Code," you must type in either "A" or "B."
 - a. *If the traveler is away in one country for under 30 days:* leave the Enrollment Cell Code as "A"
 - i. The daily rate for insurance is \$3.50
 - b. *If the traveler is away in one country for 30 days or more:* change the Enrollment Cell Code to "B."
 - i. The monthly rate for insurance is \$106.45
7. Click on the Travel Webform corresponding to that traveler, and scroll down to see if they have requested Bradley parking.
 - a. *If they have requested Bradley parking:* Close out of the Webform. You are done enrolling them
 - b. *If they have not requested Bradley parking:* Scroll down to the bottom of the Webform, check off "International Health Insurance" and "Finalize & Send Email" and then click "Finalize – International" at the bottom of the page.
8. When every traveler has been enrolled, email the "(Today's Date) of UConn-BT" document to Jonathan.Galligan@uconn.edu notifying him that the international insurance has been done. He will then enroll the travelers.
9. Once the travelers are enrolled, CISI will send them an insurance packet and card within 24-48 hours.