## Key Functionality | Copying a Member

|                    | A DENTAL Benefit Manager Toolkit ®  |   | RED DELICIOUS SIGN OUT  |
|--------------------|---|---|---|
| MANAGE             | Ocean Shelly (Subscriber)   |   | SWITCH MEMBER   |
| Ē                  | Member Details  |   | × .   |
| BENEFITS           | ID CARD VIEW HISTORY  |   | TERMINATE TRANSFER COPY EDIT  |
|                    | Personal Info<br>Prefic: -<br>Last Name: Shelly<br>First Name: Ocean<br>Single Name No  | Eligibility<br>Member Type: Subscriber<br>Eligibility Status: Active<br>Eligibility Status: New enrollment<br>Reason: New enrollment        | Contact Info           Address         123 ABC STREET,<br>Jolly, MI, 12345           Country:         -           Country:         US           Email Address         - |
|                    | Maddie Name: Sea<br>Suffic: -<br>Gender Unknown<br>Date of Birth: 03/04/1987<br>EEOB Indicator: Ne<br>Member ID Numbers<br>Member ID: | Hire Date:         -           Eigeligik Effective         08/01/2021           Date:         -           Received Date:         08/04/2021 | Phone Number: -<br>Phone Eut: -<br>Secondary: -<br>Call: -<br>Fax Number: -   |
| IMARY OF<br>HANGES | Eligibility History   | I   | COMPOSITE TRANSACTIONAL   |
|                    | Status Errom Date   | Through Date Eligibility Status Reason  | Waiting Barlod Evenot   |

## When the *Copy popup* appears, work through each section to copy the Member

| Copy Member                              | n X   | Copy Members X   | Copy Members X   | Copy Members  |               |
|--|---|--|--|---|---------------|
|  | 2.56etm + 3.5etman + 4.5etman + 3.0etmater<br>Ionito opy-method(3.to  | Literature Literature + Aliservey + Literature   | 1 Demotes + 2 Sector 1.488base + 5 Contractor<br>Select member attributes to Include in copy   | 1 Desiration > 1 Description > 1 Annuales A Barrayy & Conference  |               |
| To:<br>Toper<br>DDPH<br>Group ID<br>DE40 | A) #2000<br>(0)(%2222 B)<br>A0(%222 B)<br>A0(%2 A)(%2 | Marche Taga Marca<br>Texa Constructions<br>Texa Co | Development<br>Control Control C | Paper         BOTM         Bound of the common sector of the common secto |               |
| 10642<br>Hite Data<br>Rem/dd/2007        | Revised Data Effective Data   |  |  | Link Come Switz   |               |
| ×  |   |  |  | 4   |               |
| CANCEL                                   | Continue  | BACK MERT  | BACK   | BACK  | COMPLETE COPY |

## Key Functionality | Copying a Member (continued)

| Copy Members                         |                |                                    |                |                                 |            |   | ×     |
|--------------------------------------|----------------|------------------------------------|----------------|---------------------------------|------------|---|-------|
| Copying From:<br>Payer:<br>Group ID: | DDPMI<br>10642 | Copying To:<br>Payer:<br>Group ID: | DDPMI<br>10642 | Received<br>Date:<br>Hire Date: | -          | Override<br>Retro<br>Enrollment<br>Limit:                     | No    |
| Subgroup ID:                         | 0001           | Subgroup ID:                       | 0002           | Effective<br>Date:              | 08/01/2021 | Cient:<br>Override Paid<br>Claims:<br>Override Age<br>Limits: | No    |
| Name                                 |                |                                    | Member Type    |                                 |            | Details   |       |
| Ocean Shelly                         |                |                                    | Subscriber     |                                 |            | Success   |       |
|                                      |                |                                    |                |                                 |            |   | CLOSE |

| Ocean Shelly (Subscriber)  Family Enrollment  Coverage Type: Subscriber Only  Member ID Name DOB  ****O212 (View) Ocean Shelly 02/04/987  Cutodal Parent II II Endangered  Member Details  ID CARD   VIEW HISTORY  Partonal Info Profix III Shame: Shelly First Name: Shelly First Name: Ne Findic.korn: Shelly First Name:  | Member Type 7 Subscriber 7 Subscriber 8 Eligibility Member Type Subscribe 9 Eligibility Satus 9 Eligibility 9 Eligibilit | ACTIVE        | Contact Ir<br>Address:<br>County:      |                                     | SWITCH          |
|---|--|---------------|--|-------------------------------------|-----------------|
| Coverage Type:     Subscriber Only       Member ID     Name     DOB       ****0212 (View)     Ocean Shelly     03/04/1983       ©     Custodial Parent     Image: Custodial Parent     Image: Custodial Parent       Member Details     Image: Custodial Parent     Image: Custodial Parent     Image: Custodial Parent       ID CARD     I VIEW HISTORY     Personal Info     Personal Info       Personal Info  | 7 Subscriber<br>Eligibility<br>Member Type: Subscribe<br>Eligibility Status. Fruces<br>Eligibility Status. New error   | FUTURE ACTIVE | 08/05/2021 Contact In Address: County: | TERMINATE<br>1fo<br>123 ABC STREET, | Merged<br>-     |
| Coverage Type: Subscriber Only<br>Member ID Name DOB<br>Coverage Type: Subscriber Only<br>Coverage Dob<br>Coverage Dob<br>C | 7 Subscriber<br>Eligibility<br>Member Type: Subscribe<br>Eligibility Status. Fruces<br>Eligibility Status. New error   | FUTURE ACTIVE | 08/05/2021 Contact In Address: County: | TERMINATE<br>1fo<br>123 ABC STREET, | Merged<br>-     |
| Member ID     Name     DOB       ● Custodial Parent     ■ Endangered     ▲ Overage       ● Custodial Parent     ■ Endangered     ▲ Overage       ID CARD     VIEW HISTORY       Personal Info       Prefix:     -       Last Name:     Shelly       Find Name:     Shelly       Find Name:     Shelly       Find Name:     Sea       Suffic:     -       Gender:     Unknown       Date of Birth:     Q/Q/A/1987       EEOB Indicator:     No       Member ID Numbers   | 7 Subscriber<br>Eligibility<br>Member Type: Subscribe<br>Eligibility Status. Fruces<br>Eligibility Status. New error   | FUTURE ACTIVE | 08/05/2021 Contact In Address: County: | TERMINATE<br>1fo<br>123 ABC STREET, | Merged<br>-     |
|   | 7 Subscriber<br>Eligibility<br>Member Type: Subscribe<br>Eligibility Status. Fruces<br>Eligibility Status. New error   | FUTURE ACTIVE | 08/05/2021 Contact In Address: County: | TERMINATE<br>1fo<br>123 ABC STREET, | •               |
| Custodal Parent E Endangered Overage  Member Details  ID CARD   VIEW HISTORY  Personal Info Perfic Last Name: Sea Suffic: Gender: Unknown Date of Birth: 0//04/1987 EEC08 Indicator: Member ID Numbers  | Eligibility<br>Meriber Type: Subscrib<br>Enigobility Status. Fortuge<br>Enigobility Status. New ever   | or<br>FACTIVE | Contact Ir<br>Address:<br>County:      | TERMINATE<br>160<br>123 ABC STREET. | -               |
| Member Details       ID CARD     VIEW HISTORY       Personal Info     -       Perfic:     -       Last Name:     Snelly       First Name:     Cean       Single Name     No       Indicator:     Sea       Suffix:     -       Gender:     Unknown       Date of Birth:     0//04/987       EEOB Indicator:     No       Member ID Numbers  | Member Type: Subscribe<br>Eligibility Status: FUTURE<br>Eligibility Status New enror   | ACTIVE        | Address:<br>County:                    | 1fo<br>123 ABC STREET,              | TRANSFER   COPY |
| Personal Info Prefix: Last Name: Shely First Name: Ocean Single Name No Indicator Middle Name: Saftix: Gender: Unknown Date of Birth: OVAV/1987 EES08 Indicator No Member ID Numbers  | Member Type: Subscribe<br>Eligibility Status: FUTURE<br>Eligibility Status New enror   | ACTIVE        | Address:<br>County:                    | 1fo<br>123 ABC STREET,              | TRANSFER   COP  |
| Prefix:   | Member Type: Subscribe<br>Eligibility Status: FUTURE<br>Eligibility Status New enror   | ACTIVE        | Address:<br>County:                    | 123 ABC STREET,                     |                 |
| Lat Name: Shely First Name: Ocea Single Name No Indicator Middle Name: Sea Suffic: - Gender: Unknown Date of Birth: 03/04/1987 EEG08 Indicator: No Member ID Numbers  | Eligibility Status: FUTURE<br>Eligibility Status New enro  | ACTIVE        | County:                                |                                     |                 |
| First Name: Ocean<br>Single Name No<br>Indicator:<br>Middle Nama: Sea<br>Suffix: -<br>Gender: Unknown<br>Date of Birth: 0/30/A/1987<br>ECS08 Indicator: No<br>Member ID Numbers   | Eligibility Status New enro  |               |  | -                                   |                 |
| Single Name         No           Indicator         Indicator           Middle Name:         Sea           Suffix:         -           Gendar:         Unknown           Date of Birth:         03/04/1987           EED08 Indicator:         No           Member ID Numbers         Image: Sea  |  | oliment       |  |                                     |                 |
| Indiator:<br>Midde Nama: See<br>Suffix: -<br>Gender: Unknown<br>Date of Birly: 05/04/987<br>EEG8 Indiator: No<br>Member ID Numbers  |  |               | Country:                               | US                                  |                 |
| Suffix: -<br>Gender: Unknown<br>Date of Barty: 03/04/987<br>EEOB Indicator: No<br>Member ID Numbers   | Hire Date: -   |               | Email Addres                           | s: -                                |                 |
| Gender:         Unknown           Date of Birth:         03/04/1987           EEOB Indicator:         No           Member ID Numbers         No   | Eligibility Effective 08/05/20   | 021           | Phone Numb                             | er: -                               |                 |
| Date of Birth:         03/04/1987           EEOB Indicator:         No           Member ID Numbers  | Date:  |               | Phone Ext:                             | -                                   |                 |
| EEOB Indicator: No<br>Member ID Numbers   | Received Date: 08/04/20  | 021           | Secondary:                             | -                                   |                 |
| Member ID Numbers   |  |               | Cell:                                  | -                                   |                 |
|   |  |               | Fax Number:                            |                                     |                 |
| Member ID: *****0212 (View)   |  |               |  |                                     |                 |
|   |  |               |  |                                     |                 |
| Alternate ID: 080420211 (Group Assigned)  |  |               |  |                                     |                 |
| System Generated ID: 05000005854081   |  |               |  |                                     |                 |
| Eligibility History   |  |               |  | COMPOSITE                           | TRANSACTIONAL   |
| Status From Date  |  |               |  |                                     |                 |

After closing out of the *Copy workflow*, you will see the newly Copied Member(s) on the *Member Detail* page.