

Software Training: **Additional Setup** **Insurance**





Welcome to ConsumerMath.org

- This presentation is one of eight which will show you how to use the Additional Setup options to form your class into the unique program you want to run.



Additional Setup



Additional Setup Options Available to You:

- Edit Homework Types
- Default Bills
- Job Titles
- Default Withholdings
- Loan
- **Insurance**
- Maladies
- Set Grading

Edit Insurance

Select **Insurance** from the Dropdown Menu.



Consumer Math | **Dashboard** | **Additional Setup** | **Data Management** | Search Students | Logout

Dashboard

Course & Grades

[+ Add Course](#)

No Courses found.

Weekly Payroll

No Courses found.

Paying Bills

Courses	Monday-Thursday	Friday	Friday	Monday - Thursday
No Courses found.				

Edit Insurance

Insurance exists to help the students offset the costs of maladies.

We recommend these three types of insurances, but you should have an insurance for each type of malady you set up.

Consumer Math | Dashboard | Additional Setup | Data Management | Search Students | Logout | Help On

Insurance

Home Add New

Name	Cost	Co pay	Co insurance	Actions
Home BRK 30	30.0	30.0	5.0	
Home WOD 10	10.0	50.0	10.0	
Home STR 5	5.0	70.0	20.0	

Automobile Add New

Name	Cost	Co pay	Co insurance	Actions
AUTO NB 20	20.0	25.0	20.0	
AUTO C 30	30.0	50.0	10.0	
AUTO S 10	10.0	50.0	30.0	

Medical Add New

Name	Cost	Co pay	Co insurance	Actions
Health BT 10	10.0	70.0	30.0	

Edit Insurance

We provide a set of default insurances. You can use them as they are, or you can edit them to suit your needs.

Consumer Math | Dashboard | Additional Setup | Data Management | Search Students | Logout | Help On

Insurance

Home Add New

Name	Cost	Co pay	Co insurance	Actions
Home BRK 30	30.0	30.0	5.0	
Home WOD 10	10.0	50.0	10.0	
Home STR 5	5.0	70.0	20.0	

Automobile Add New

Name	Cost	Co pay	Co insurance	Actions
AUTO NB 20	20.0	25.0	20.0	
AUTO C 30	30.0	10.0	10.0	
AUTO S 10	10.0	50.0	30.0	


Medical Add New









Name	Cost	Co pay	Co insurance	Actions
Health BT 10	10.0	70.0	30.0	

To edit the name of an existing insurance type, click the “edit” icon.

Edit Insurance

We provide a set of default insurances. You can use them as they are, or you can edit them to suit your needs.

Medical  + Add New

Name	Cost	Co pay	Co insurance	Actions
Health BT 10	10.0	70.0	30.0	 
Health AW 70	70.0	20.0	0.0	 
Health NB 40	40.0	30.0	15.0	 
Health OK 20	20.0	50.0	20.0	 

Insurance Types

Add New

Name


Remove









Name

To add a new type of insurance, enter the **name** here, and submit.

Edit Insurance

We provide a set of default insurances. You can use them as they are, or you can edit them to suit your needs.

Medical  + Add New

Name	Cost	Co pay	Co insurance	Actions
Health BT 10	10.0	70.0	30.0	 
Health AW 70	70.0	20.0	0.0	 
Health NB 40	40.0	30.0	15.0	 
Health OK 20	20.0	50.0	20.0	 


Insurance Types

Add New

Name

Remove

Name

 -Select-

To delete an existing type of insurance, select the **name** here, and click remove.

Edit Insurance

The individual policies are what is available to the students to buy.

Again, we have provided you with a set of default insurance policies, but you can change them to suit your needs.

Consumer Math | Dashboard | Additional Setup | Data Management | Search Students | Logout | Help On

Insurance

Home + Add New

Name	Cost	Co pay	Co insurance	Actions
Home BRK 30	30.0	30.0	5.0	
Home WOD 10	10.0	50.0	10.0	
Home STR 5	5.0	70.0	20.0	

Automobile + Add New

Name	Cost	Co pay	Co insurance	Actions
AUTO NB 20	20.0	25.0	20.0	
AUTO C 30	30.0	10.0	10.0	
AUTO S 10	10.0	50.0	30.0	

Medical + Add New

Name	Cost	Co pay	Co insurance	Actions
Health BT 10	10.0	70.0	30.0	

Edit Insurance

To **edit** or **delete** an existing policy, click the corresponding button.

Consumer Math | Dashboard | Additional Setup | Policy Management | Search Students | Logout | Help On

Insurance

Home + Add New

Name	Cost	Co pay	Co insurance	Actions
Home BRK 30	30.0	30.0	5.0	
Home WOD 10	10.0	50.0	10.0	
Home STR 5	5.0	70.0	20.0	

Automobile + Add New

Name	Cost	Co pay	Co insurance	Actions
AUTO NB 20	20.0	25.0	20.0	
AUTO C 30	30.0	10.0	10.0	
AUTO S 10	10.0	50.0	30.0	

Medical + Add New

Name	Cost	Co pay	Co insurance	Actions
Health BT 10	10.0	70.0	30.0	

To add a new policy, click the “**Add New**” button which corresponds with the insurance type you want it to be part of.

Edit Insurance

Insurance Policies

Give each policy a **name** you can easily identify. Like The Three Little Pigs, I am going to offer three levels of insurance: Brick, Wood, and Straw.

New Insurance Policy

Name

Home- Brick

Cost

Co pay

Co insurance

Description

Insurance type

Please select

Submit

Back

Edit Insurance

Insurance Policies

The **cost** is what the students will pay weekly to have this level of insurance. If they don't pay this, you should cancel their coverage.

Brick will be my most expensive, but it will also provide the most coverage with a low Co-Pay and low Co-Insurance.

You do not need to use symbols such as "\$" and "%."

New Insurance Policy

Name

Home- Brick

Cost

30.00

Co pay

5.00

Co insurance

5

Description

Insurance type

Please select

Submit

Back

Edit Insurance

Insurance Policies

New Insurance Policy

Name
Home- Brick

Cost
30.00

Co pay
5.00

Co insurance
5

Description

Insurance type
Please select

The **Co-Pay** is the dollar amount the student will pay each time they have a malady and

The **Co-Insurance** is the percentage of the maladies' total costs which the students is also responsible to pay.

Not all insurance policies must have both a co-insurance and a co-pay.

Edit Insurance

Insurance Policies

New Insurance Policy

Name

Home- Brick

Cost

30.00

Co pay

5.00

Co insurance

5

Description

Insurance type

Please select

Submit

Back

You do not have to enter a **description**.
But if you want to give a little more
information about the malady, this is
the place to do it.





Edit Insurance



Insurance Policies

The **Insurance Type** is what you set up previously. Every policy must be setup under one of the existing Insurance Types. In this case, I am setting up a policy for Home Insurance.

New Insurance Policy

Name
Home- Brick

Cost
30.00

Co pay
5.00

Co insurance
5

Description

Insurance type
Home

[Submit](#) [Back](#)

Edit Insurance

Insurance Policies

Submit to save your work.

New Insurance Policy

Name

Home- Brick

Cost

30.00

Co pay

5.00

Co insurance

5

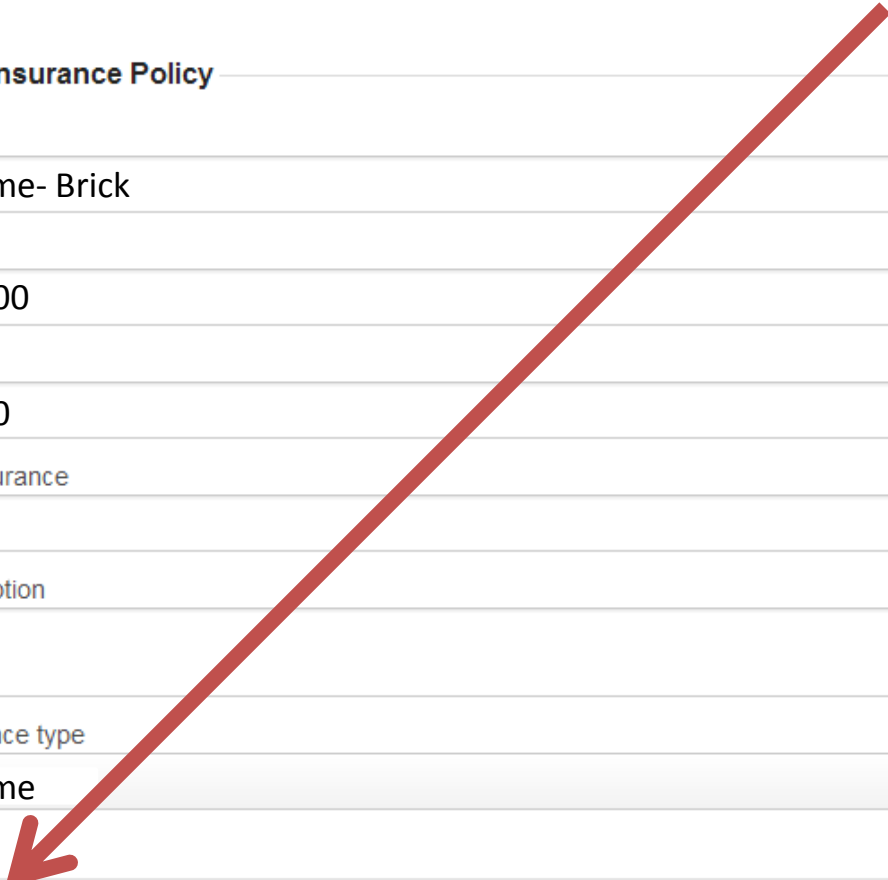
Description

Insurance type

Home

Submit

Back





That's it!



You have now know how to navigate the Additional Setup options.

Check out these other tutorials for more in depth training:

[Quick Start Guide](#)

[The First 4 Weeks](#)

[Running Payroll](#)

[Grading with Money](#)

[Hints for First Time Teachers](#)