

Key Functionality | Copying a Member

DELTA DENTAL | Benefit Manager Toolkit © | RED DELICIOUS | SIGN OUT

Ocean Shelly (Subscriber) | SWITCH MEMBER

Member Details

ID CARD | VIEW HISTORY | TERMINATE | TRANSFER | **COPY** | EDIT

Personal Info

Prefix: -
 Last Name: Shelly
 First Name: Ocean
 Single Name Indicator: No
 Middle Name: Sea
 Suffix: -
 Gender: Unknown
 Date of Birth: 03/04/1987
 EEOB Indicator: No

Member ID Numbers

Member ID: ****0212 (View)
 Alternate ID: 931595133 (Delta Assigned)

Eligibility

Member Type: Subscriber
 Eligibility Status: **ACTIVE**
 Reason: New enrollment
 Hire Date: -
 Eligibility Effective Date: 08/01/2021
 Received Date: 08/04/2021

Contact Info

Address: 123 ABC STREET, Jolly, MI, 12345
 Country: -
 Country: US
 Email Address: -
 Phone Number: -
 Phone Ext: -
 Secondary: -
 Cell: -
 Fax Number: -

Eligibility History

COMPOSITE | TRANSACTIONAL

To **Copy a Member**, begin by navigating to the **Member** tab within the **Member Eligibility** section and searching for the desired member. Select a Member from the returned list to continue.

Once the selected Member's profile page populates, scroll down to the **Member Details** section and press **Copy**.

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

Copy Members

Member | Eligibility | Summary | All of Date | All of Date | All of Date

Search criteria: The, All of Date, All of Date, All of Date, All of Date

Buttons: CANCEL, CONTINUE

Copy Members

Member | Eligibility | Summary | All of Date | All of Date | All of Date

Select member(s) to copy:

Member Type	Name
Subscriber	Ocean Shelly

Buttons: BACK, NEXT

Copy Members

Member | Eligibility | Summary | All of Date | All of Date | All of Date

Select member attributes to include in copy:

Member Category	Member ID	Member Name	Member Type	Member Status	Member Reason	Member Hire Date	Member Effective Date	Member Received Date
Subscriber	****0212	Ocean Shelly	Subscriber	ACTIVE	New enrollment	08/01/2021	08/01/2021	08/04/2021

Buttons: BACK, NEXT

Copy Members

Member | Eligibility | Summary | All of Date | All of Date | All of Date

Select member numbers to include in copy:

Member ID	Member Name	Member Type	Member Status	Member Reason	Member Hire Date	Member Effective Date	Member Received Date
****0212	Ocean Shelly	Subscriber	ACTIVE	New enrollment	08/01/2021	08/01/2021	08/04/2021

Buttons: BACK, COMPLETE COPY

Key Functionality | Copying a Member (continued)

Copy Members ✕

Copying From:		Copying To:					
Payer:	DDPMI	Payer:	DDPMI	Received Date:	-	Override Retro Enrollment Limit:	No
Group ID:	10642	Group ID:	10642	Hire Date:	-	Override Paid Claims:	No
Subgroup ID:	0001	Subgroup ID:	0002	Effective Date:	08/01/2021	Override Age Limits:	No

Name	Member Type	Details
Ocean Shelly	Subscriber	Success

CLOSE

When the Copy has been successfully completed, you will see a **Success** note in the **Details** section.

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Ocean Shelly (Subscriber) SWITCH MEMBER

Family Enrollment ▼

Coverage Type: [Subscriber Only](#) ADD DEPENDENT

Member ID	Name	DOB	Member Type	Status	Eligibility Effective Date	Special Attribute	Merged
*****0212 (View)	Ocean Shelly	03/04/1987	Subscriber	FUTURE ACTIVE	08/05/2021	-	-

⊙ Custodial Parent
 ⊠ Endangered
 ⚠ Overage

Member Details ▼

TERMINATE | TRANSFER | COPY | EDIT

Personal Info		Eligibility		Contact Info	
Prefix:	-	Member Type:	Subscriber	Address:	123 ABC STREET, Jolly, MI, 12345
Last Name:	Shelly	Eligibility Status:	FUTURE ACTIVE	Country:	-
First Name:	Ocean	Eligibility Status Reason:	New enrollment	Country:	US
Single Name Indicator:	No	Hire Date:	-	Email Address:	-
Middle Name:	Sea	Eligibility Effective Date:	08/05/2021	Phone Number:	-
Suffix:	-	Received Date:	08/04/2021	Phone Ext.:	-
Gender:	Unknown			Secondary:	-
Date of Birth:	03/04/1987			Cell:	-
EEOB Indicator:	No			Fax Number:	-

Member ID Numbers

Member ID: *****0212 (View)

Alternate ID: 08042021 (Group Assigned)

System Generated ID: 05000005854081

Eligibility History COMPOSITE TRANSACTIONAL

Status	From Date	Through Date	Eligibility Status Reason	Waiting Period Exempt
ACTIVE	08/05/2021		New enrollment	No

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