

## Manually Enter Member Movement

Please choose Member Action below:



Add Employee



Add Dependents



Terminate Member



Change Plan



Change Salary



Change Details -  
Employee










Change Details -  
Dependent

*PLEASE  
CHOOSE MEMBER  
ACTION OPTION*

# Manually Enter Member Movement

Please choose Member Action below:

-  **Add Employee**
-  **Add Dependents**
-  **Terminate Member**
-  **Change Plan**
-  **Change Salary**
-  **Change Details - Employee**
-  **Change Details - Dependent**

## ADD EMPLOYEE ACTION

Input the employee's information below. Please note the **\*mandatory fields** that are required to proceed with adding your new employee into the Client Portal.

**Policy Number\*:**

Enter the Policy Number here

**Effective Date\* (The movement will apply to current policy period only)**

YYYY — MM — DD

**Plan\*:**

Enter Plan #

**Member Name\* (Accept English characters, "-", "'", and " " only)**

Please enter member's full name

**Sex\* (M - Male, F - Female)**

Please enter gender

**ID Type:** (1=HKID, 2=Passport, 3=BR Number, 4=CI Number, 5=Association Number, 6=Temp Id, 7=Exit-entry Permit Number, 9=Others)

Enter ID Type

**ID Card Number:**

Enter ID card number here

**Branch:** (If you cannot find an appropriate value, please contact )

Choose Branch ▾

**Department:** (If you cannot find an appropriate value, please contact )

Choose Department ▾

**Employment Date\*:**

YYYY — MM — DD

**Bank A/C Number:**

Enter Bank A/C here

**Bank Code and Payment Method:**

Choose Bank Code and Payment Method: ▾

**Marital Status:** (S - Single, M - Married, D - Divorced)

Choose Marital Status ▾

**Email Address:**

Enter member's email address here

**Salary:**

Enter member's Salary

**Occupation\* (Accept English characters, "-", "'", and " " only)**

Enter Member's occupation

**Stationed Country\***

Choose Stationed Country ▾

**Nationality\*:**

Choose Nationality ▾

**Staff Number:**

Enter member's staff number here

**Alias:**








Enter member's Alias here

Back

REVIEW

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-  **Add Employee**
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-  **Change Plan**
-  **Change Salary**
-  **Change Details - Employee**
-  **Change Details - Dependent**

## ADD EMPLOYEE ACTION

Input the employee's information below. Please note the **\*mandatory fields** that are required to proceed with adding your new employee into the Client Portal.

Policy Number\*:

Enter the Policy Number here

Effective Date\* (The movement will apply to current policy period only)

**Are you sure you want to go back? You will lose all the information you have entered thus far. Please confirm if you wish to go back or resume entering in your member's information.**

GO BACK

RESUME

Branch: (If you cannot find an appropriate value, please contact )

Choose Branch ▾

Department: (If you cannot find an appropriate value, please contact )

Choose Department ▾

Employment Date\*:

YYYY — MM — DD

Bank A/C Number:

Enter Bank A/C here

Bank Code and Payment Method:

Choose Bank Code and Payment Method: ▾

Marital Status: (S - Single, M - Married, D - Divorced)

Choose Marital Status ▾

Email Address:

Enter member's email address here

Salary:

Enter member's Salary

Occupation\* (Accept English characters, "-", "'", and " " only)

Enter Member's occupation

Stationed Country\*

Choose Stationed Country ▾

Nationality\*:

Choose Nationality ▾

Staff Number:

Enter member's staff number here

Alias:

Enter member's Alias here

Back

REVIEW

# Manually Enter Member Movement

Please choose Member Action below:



Add Employee



Add Dependents



Terminate Member



Change Plan



Change Salary



Change Details - Employee



Change Details - Dependent

## REVIEW EMPLOYEE INFORMATION

*Please review the information you have entered. If everything is correct please click CONFIRM, if you need to edit the details please click BACK.*

Policy Number: 198213  
Effective Date: 2021-02-20  
Plan: 02  
Member Name: James Chow  
Sex: Male  
ID Type: Blank  
ID Card: Blank  
Branch: Blank  
Department: Blank  
Employment Date: 2020-12-23  
Bank A/C Number: Blank  
Bank Code and Payment Method:  
Marital Status: Blank  
Email Address: JChow@cccc.com  
Salary: Blank  
Occupation: Head of Sales  
Stationed Country: Hong Kong  
Nationality: USA  
Staff Number: Blank  
Alias: Blank

EDIT

CONFIRM