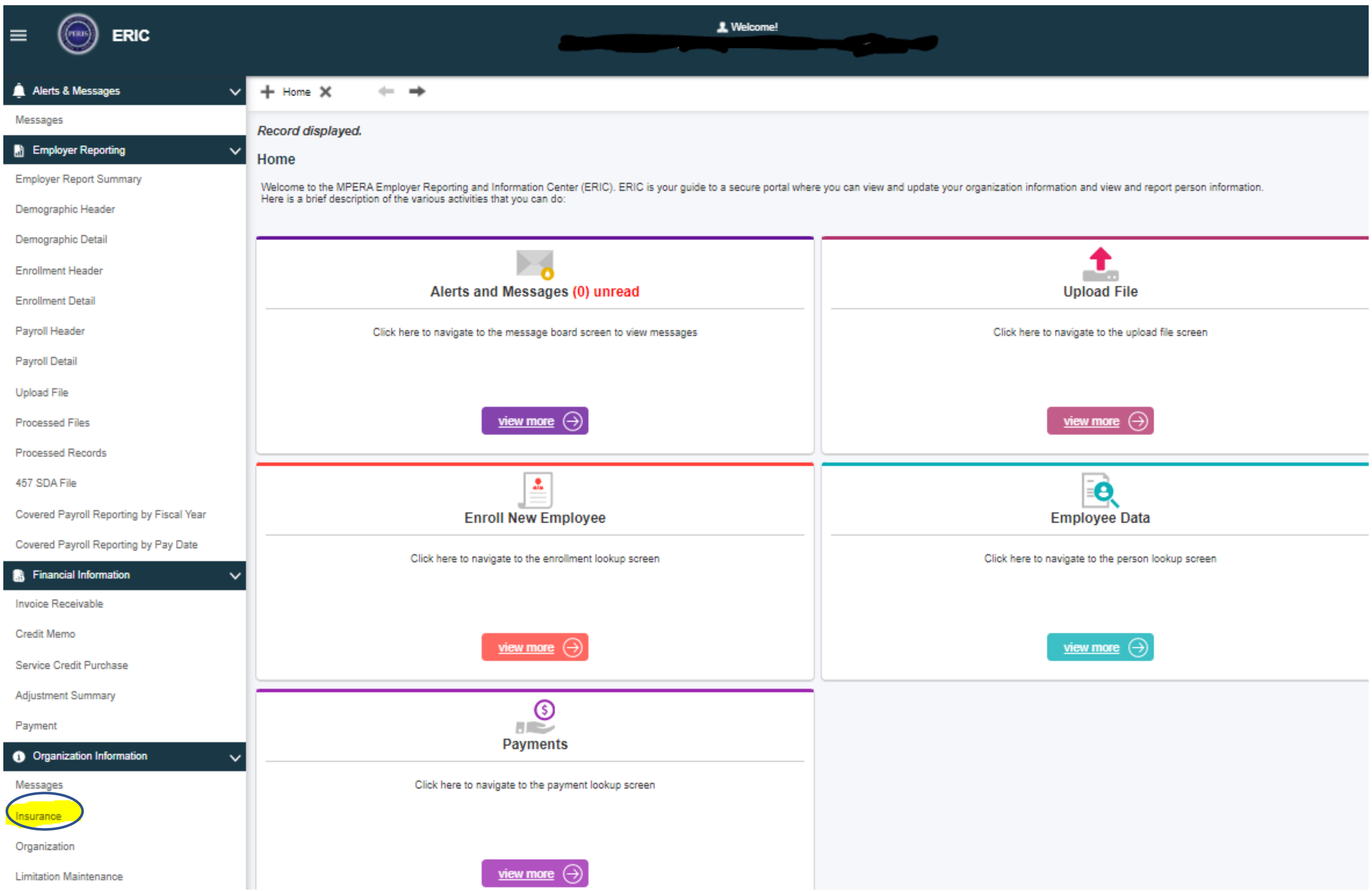
Adding a retiree to Insurance

1. Retiree and employer must first complete the "Health Insurance Authorization" form on MPERA's website at https://mpera.mt.gov/employers/employerbasics/EmployerForms and send back to MPERA.

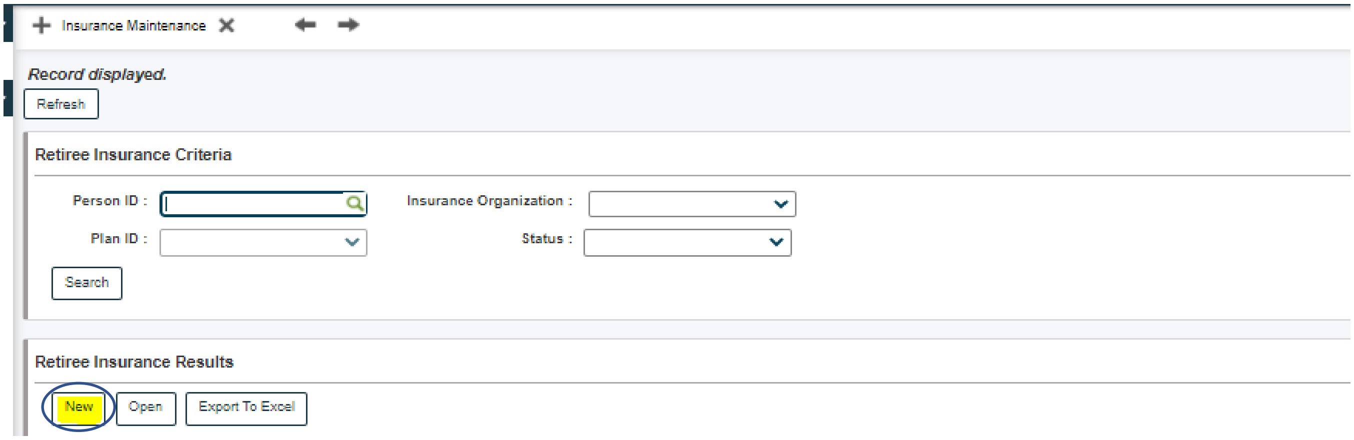
2. Once MPERA has received this form and a retirement application for the person, the employer can add the person to their insurance in ERIC. MPERA recommends having the retiree self-pay for the first month of their retirement, since not all retirement applications are entered by the insurance cutoff date of the 16th of each month. Forms must be signed (by retiree/recipient and employer) and entered on or before the 16th of each month (by employer) for the deduction to take effect. If not, the deduction won't take place until the following month.

3. Sign into ERIC at https://eric.mt.gov/PERISESS/Account/wfmLoginE

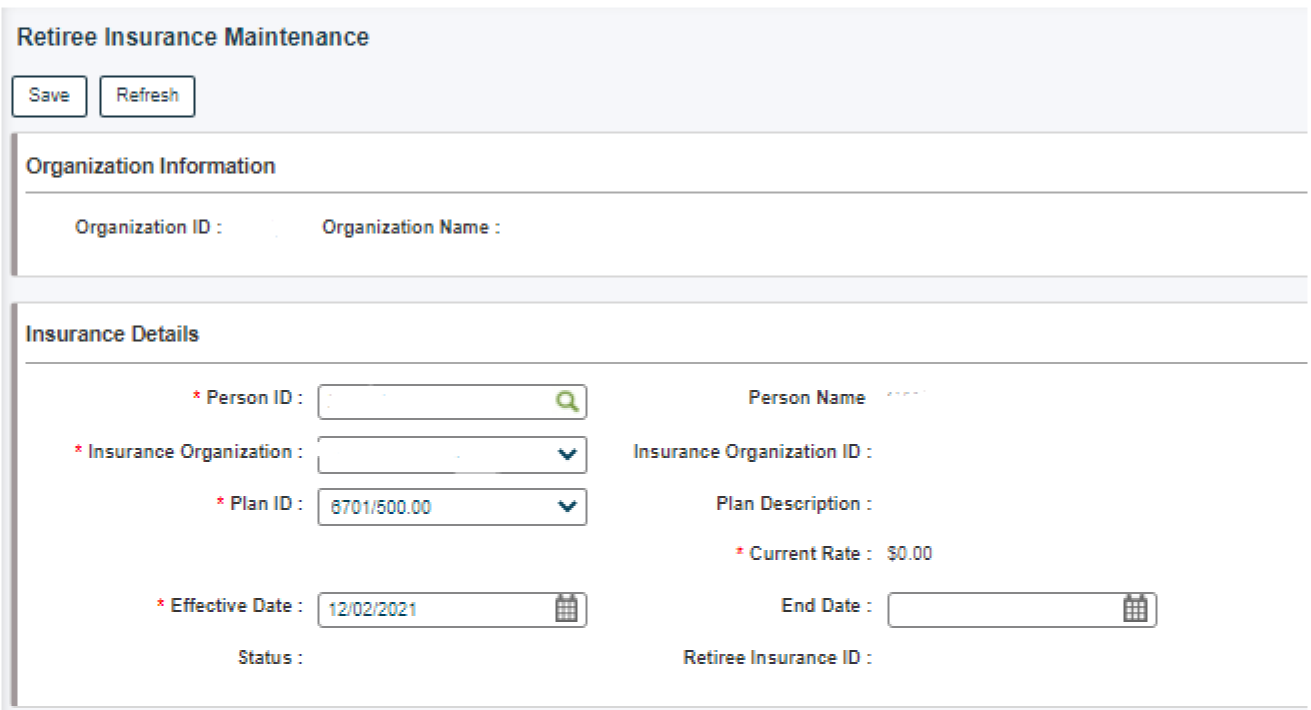
4. From the left side menu bar, choose "Insurance"



5. On the "Insurance Maintenance" screen under "Retiree Insurance Results" choose "New"



6. You will be routed to the "Retiree Insurance Maintenance" screen. Enter the "Person ID", "Insurance Organization", "Plan ID", and "Effective Date", then click "Save". If you do not know the Person ID, click on the magnifying glass next to the blank space and search for the person based on the search criteria. The Effective Date must be the current date or future date.



7. Once the person is saved, there are no error messages received, and you have returned to the Insurance Maintenance screen the person that was added should be listed under Retiree Insurance Results and be in a "Pending Batch" status. The batch runs on the night of the 16^{th} of each month. Any changes made after this date or with an effective date after the 16th will not be effective until the following month.