

Adding a New Insurance Rate

1. Sign into ERIC at <https://eric.mt.gov/PERISESS/Account/wfmLoginE>
2. From the left side menu bar, choose "Organization"

The screenshot shows the ERIC home page. The left navigation menu is expanded to 'Organization Information', and the 'Organization' option is highlighted in yellow. The main content area displays a 'Home' dashboard with several cards: 'Alerts and Messages (0) unread', 'Upload File', 'Enroll New Employee', 'Employee Data', and 'Payments'. Each card has a 'view more' button.

3. In the "Employer Maintenance" screen choose the tab under "Other Details" titled "Insurance" and click on the "Insurance Org ID" number

The screenshot shows the 'Employer Maintenance' screen. The 'Main Section' contains various fields for organization details, including Organization Type, Employer Type, Effective Date, State TIN, Federal TIN, Preferred Communication, Reporting Method, and Health Care Vendor Organization Name. The 'Other Details' section is expanded to show the 'Insurance' tab, which contains a table with the following data:

Insurance Org ID	Insurance Org Name	Effective Date	End Date
8308		07/01/1993	

At the bottom of the screen, it shows 'Create : CONVERSION' and '08/10/2014 12:00:00 AM'.

4. On the "Organization Insurance Maintenance" screen, under "Insurance Plans" click on "New"

Organization Insurance Maintenance

Save Refresh Execute Refresh From Object

Organization Information

Organization ID : Organization Name :

Insurance Details

Insurance Organization ID : 5095

* Insurance Organization : Insurance Organization Name :

* Effective Date : 07/01/1993 End Date :

Description :

Insurance Plans

Plan ID : Effective Date : Status : Filter

New Open Export to Excel

5. On the "Organization Insurance Plan Maintenance" screen enter the "Plan Effective Date" and click Save. Do not enter a "Plan End Date". A description is not required. Once you have hit save, under the "Plan Rates" section, you will choose "Add Rate". Enter the "Rate Effective Date" and "Plan Rate" and hit Save. The Plan Effective Rate and Rate Effective Date must be the current date or a future date. If everything is entered correctly, the status should be Approved.

NOTE: When creating a new account, the plan effective date and rate effective date will be the same. If they are not, it will show in a review status instead of an approved status

Organization Insurance Plan Maintenance

Save Refresh

Organization Information

Organization ID : Organization Name :

Insurance Details

Plan ID : 6701

* Plan Effective Date : 12/02/2021 Plan End Date :

Current Plan Rate : \$500.00 Status : Approved

Description :

Plans Rates

Add Rate Remove Rate Export To Excel

Select	Rate Effective Date	Plan Rate
<input type="checkbox"/>	12/02/2021	\$500.00

Other Details

Errors Status History

Message ID	Message	Severity
No records to display.		