## Adding a New Insurance Rate

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

	L Welcome!					
🔔 Alerts & Messages 🛛 🗸 🗸	+ Home × $\leftarrow$ $\Rightarrow$					
Messages	Record displayed.					
🖁 Employer Reporting 🗸 🗸	Home					
Employer Report Summary	Welcome to the MPERA Employer Reporting and Information Center (ERIC). ERIC is your guide to a secure portal where you can view and update your organization information and view and report person information.					
Demographic Header	Here is a oner description of the various activities that you can do:					
Demographic Detail						
Enrollment Header	0	<b>.</b>				
Enrollment Detail	Alerts and Messages (0) unread	Upload File				
Payroll Header	Click here to navigate to the message board screen to view messages	Click here to navigate to the upload file screen				
Payroll Detail						
Upload File						
Processed Files	view more 🔿	view more $\ominus$				
Processed Records						
457 SDA File	<u>.</u>	ē				
Covered Payroll Reporting by Fiscal Year	Enroll New Employee	Employee Data				
Covered Payroll Reporting by Pay Date	Click hare to pavinate to the enrollment lookup screen	Clink here to pavinate to the person lookup screen				
📑 Financial Information 🗸 🗸	onex name to manyous to the antimistic lookup zonauti					
Invoice Receivable						
Credit Memo	view more	view more				
Service Credit Purchase						
Adjustment Summary						
Payment						
<ol> <li>Organization Information</li> </ol>	Payments					
Messages	Click here to navigate to the payment lookup screen					
Organization Limitation Maintenance	view more					
Contribution Rate						

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

Messages	[Record displayed, Please make changes and press SAVE. ]						
Employer Reporting	Employer Maintenance						
Employer Report Summary	Save Refresh Veev Images						
Demographic Header							
Demographic Detail	Main Section						
Enrollment Header	Organization Type : Employer Employer Type : Other Local Government Effective Date : 01011098						
Enrollment Detail	State TIN : County : County : End Date :						
Payroll Header	Federal TIN :         Status :         Active         MPERA ID :         0028						
Payroll Detail	Preferred Communication : Email V Reporting Method : Web Status Effective Date : 01011008						
Upload File	Employer Pays Contribution for Service Purchase : Yes Employer Pays Interest For Service Purchase : Yes Employer Pays Interest For Workers Comp. : No						
Processed Files	Auto PostER File: Yes						
Processed Records	Health Care Vendor Organization Name : Primary Contact : Primary Address :						
457 SDA File	Primary Email : Primary Phone : City Class :						
Covered Payroll Reporting by Fiscal Year	1						
Covered Payroll Reporting by Pay Date	Other Details						
Financial Information	Address Plan Contact Bank Payroll Schedule Status History Territore						
Invoice Receivable							
Credit Memo	Open						
Service Credit Purchase	Insurance Org ID Insurance Org Name Effective Date End Date						
Adjustment Summary	2010						
Payment							
<ol> <li>Organization Information</li> </ol>	1						
Messages	Create: CONVERSION 08/10/2014 12:00:00 AM Modify: kembla						
Insurance							
Organization							

## 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 :	Orga	nization Name : ,	
Insurance Details			
Insurance Organization ID :	5095		
* Insurance Organization :	Q	Insurance Organization Name :	
* Effective Date :	07/01/1993	End Date :	<b>İ</b>
Description :			
Insurance Plans			
Plan ID :	Effective Data	a: []	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 :	8701						
* Plan Effective Date :	12/02/2021	Plan End Date :	<b>(</b> )				
Current Plan Rate :	\$500.00	Status :	Approved				
Description :							
Plans Rates							
Add Rate Remove Rate Export To Excel							
Select Rate Effective Date	Plan Rate						
12/02/2021 \$500.00							
Other Details							
Errors Status History							
Message ID Message Severity							
No records to display.							