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

= 💮 ERIC	L Welcome!						
🛕 Alerts & Messages 🛛 🗸 🗸	+ Home \times \leftarrow \rightarrow						
Messages	Record displayed. Home						
🚡 Employer Reporting 🗸 🗸 🗸							
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. Here is a brief description of the various activities that you can do:						
Demographic Header							
Demographic Detail							
Enrollment Header	0						
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 \ominus					
Processed Records							
457 SDA File	<u>.</u>						
Covered Payroll Reporting by Fiscal Year	Enroll New Employee	Employee Data					
Covered Payroll Reporting by Pay Date	Click here to pavinate to the annoliment lookup screen	Click here to navigate to the person lookup screen					
Financial Information	one need to have to the entitlent house something						
Invoice Receivable							
Credit Memo	view more	view more					
Service Credit Purchase							
Adjustment Summary							
Payment							
 Organization Information 	Payments						
Messages	Click here to navigate to the payment lookup screen						
Organization							
Limitation Maintenance	view more \ominus						

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

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

+ Insurance Maintenance X + +					
Record displayed. Refresh					
Retiree Insurance Criteria					
Person ID : Insurance Organization :					
Plan ID : 🔹 Status : 🖍					
Search					
Retiree Insurance Results					
New Open Export To Excel					

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.

Retiree Insurance Maintenance						
Save Refresh						
Organization Information						
Organization ID : Organization Name :						
Insurance Details						
* Person ID :		Q	Person Name	2000 ⁻¹		
* Insurance Organization :		~	Insurance Organization ID :			
* Plan ID :	6701/500.00	~	Plan Description :			
			* Current Rate :	\$0.00		
* Effective Date :	12/02/2021	餔	End Date :	(
Status :			Retiree Insurance ID :			

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 16th 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.