Changing an Existing Insurance Rate

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

ERIC	L Welcome!	
🛕 Alerts & Messages 🛛 🗸 🗸	+ Home X ← →	
Messages	Record displayed.	
Employer Reporting V	Home	
Employer Report Summary	Welcome to the MPERA Employer Reporting and Information Center (ERIC). ERIC is your guide to a secure portal where	e you can view and update your organization information and view and report person information.
Demographic Header	Here is a brief description of the various activities that you can do.	
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	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 have to environment to the excellence backup except	Oliak have to anying to the annual tables are a
🔒 Financial Information 🗸 🗸	Citok here to havigate to the enforment lookop screen	Click nere to havigate to the person lookup screen
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	
Insurance		
Organization		
Limitation Maintenance	view more \ominus	
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 V	Employer Maintenance				
Employer Report Summary	Save Refresh View Images				
Demographic Header					
Demographic Detail	Main Section				
Enrollment Header	Organization Type :	Employer	Employer Type :	Other Local Government	Effective Date: 01/01/1998
Enrollment Detail	State TIN :		* County :	х. — 🗸	End Date :
Payroll Header	Federal TIN :		Status :	Active	MPERA ID : 9028
Payroll Detail	Preferred Communication :	Email 🗸	Reporting Method :	Web	Status Effective Date : 01/01/1998
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 Post ER 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					
Covered Payroll Reporting by Pay Date	Other Details				
Financial Information					
Invoice Receivable	Address Plan Contact Bank Payro	Il Schedule Status History	Insurance		
Credit Memo	Open				
Service Credit Purchase	Insurance Org ID Insurance Org Name	Effective Date End Date			
Adjustment Summary		07/01/1000			
Payment		. 0//01/1993			
 Organization Information 					
Messages	Create : CONVERSION	08/10/20	14 12:00:00 AM	Modify : kerri.bla	
Insurance					
Organization					

4. On the "Organization Insurance Maintenance" screen, under "Insurance Plans" click on the "Plan ID" of the rate you want to change

Organ Save	Refresh	nsurance Main	rom Object						
Organ	ization Info	rmation							
Organization ID :					Organization Name :				
Insura	ince Details								
			In	surance Organization ID): 5095				
				Insurance Organization	1: [*		Q		Insurance Organi
				* Effective Date	e : 07/01/1993		餔		
				Description	1:				
Insura	ince Plans								
			Plan ID :				Effe	ctive Date :	
Ne	w Open	Export to Excel							
	Plan ID	Plan Effective Date	Plan End Date	Current Plan Rate	Future Plan Effective Date	Future Plan Rate	Status		
	<u>8701</u>	12/02/2021		\$500.00		\$0.00	Approved		
	6601	03/10/2021		\$974.00		\$0.00	Approved		

5. This will bring you to the "Organization Insurance Plan Maintenance" screen. Under "Plan Rates" choose "Add Rate". This will add another row. Enter the "Rate Effective Date" and "Plan Rate", then click Save. The Rate Effective Date must be the current date or a future date.

Organization Insurance Plan Maintenance						
Save Refresh						
Organization Information						
Organization ID :		Organization Name				
Lunaria Datalla						
Plan ID	8801					
* Plan Effective Date :	03/10/2021	Plan End Date :				
Current Plan Rate :	\$950.00	Status	Approved			
Description						
Plans Rates						
Add Rate Remove Rate Export To Excel						
Select Rate Effective Date	Plan Rate					
03/10/2021	\$974.00					
12/02/2021 \$960.00						
Errors Status History						
Message ID Message Severity						
No records to display.						

6. From the left side menu bar, choose "Insurance", this will take you to the Insurance Maintenance screen. The rate you changed should change any active retirees on the Plan ID into a Pending Batch status and update the rate to the new amount.

🔔 Alerts & Messages 🛛 🗸 🗸	+ Insurance Maintenance · × ← →	
Messages	[All changes successfully saved.]	
Employer Reporting	Refresh	
Employer Report Summary	Retiree Insurance Criteria	
Demographic Header		
Demographic Detail	Person ID : Insurance Organization :	
Enrollment Header	Plan ID : V Status : V	
Enrollment Detail	Search	
Payroll Header		
Payroll Detail	Retiree Insurance Results	
Upload File	New Open Export To Excel	
Processed Files		
Processed Records	Retiree Insurance ID Person ID Person Name Insurance Organization ID Insurance Organization Name Plan ID Effective Date End Date Current Rate Future Rate Status	
457 SDA File	24510 5850.00 \$0.00 Pending Batch)
Covered Payroll Reporting by Fiscal Year		
Covered Payroll Reporting by Pay Date	Create :	м
Financial Information		
Invoice Receivable		
Credit Memo		
Service Credit Purchase		
Adjustment Summary		
Payment		
 Organization Information 		
Organization		