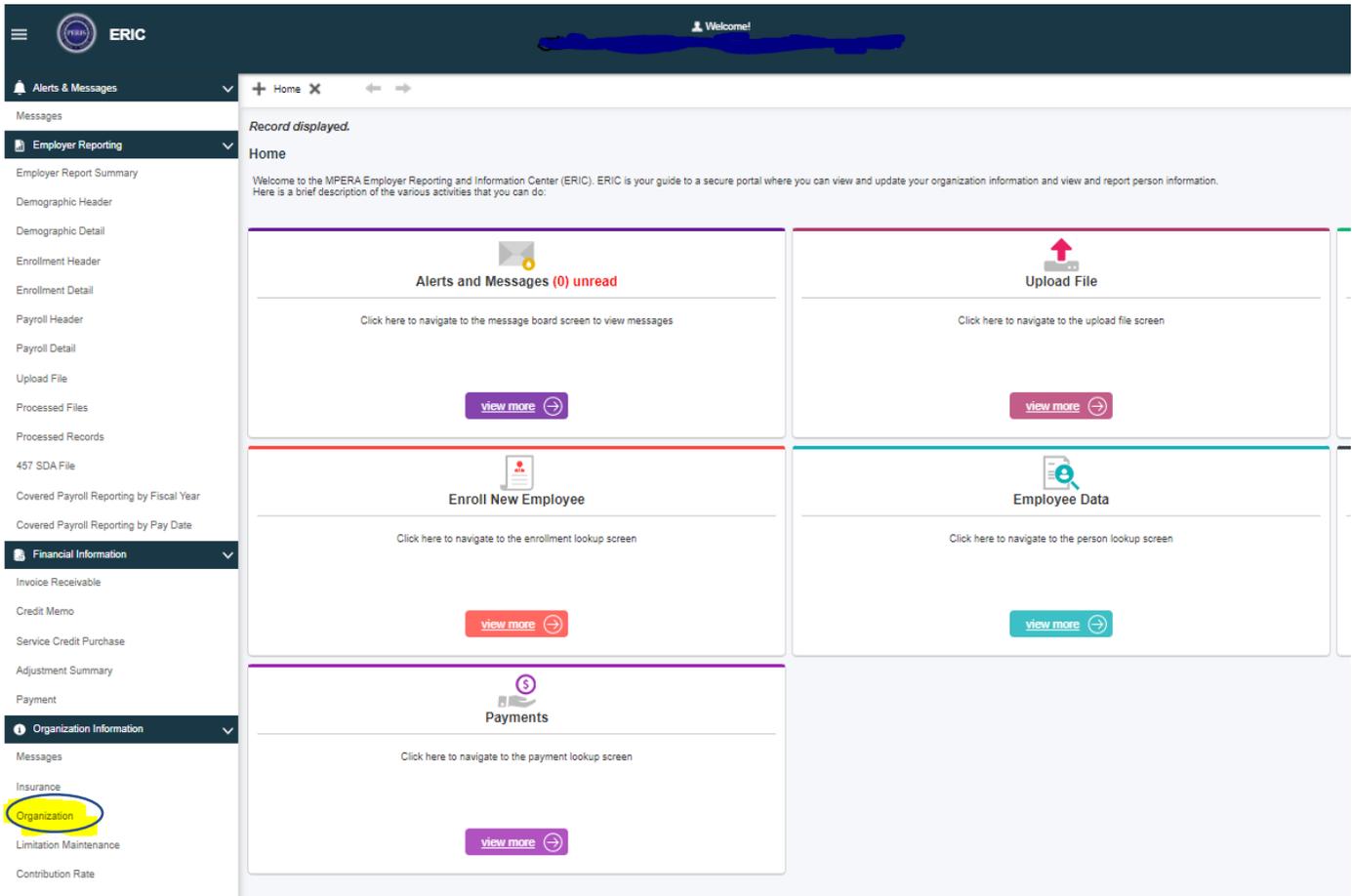
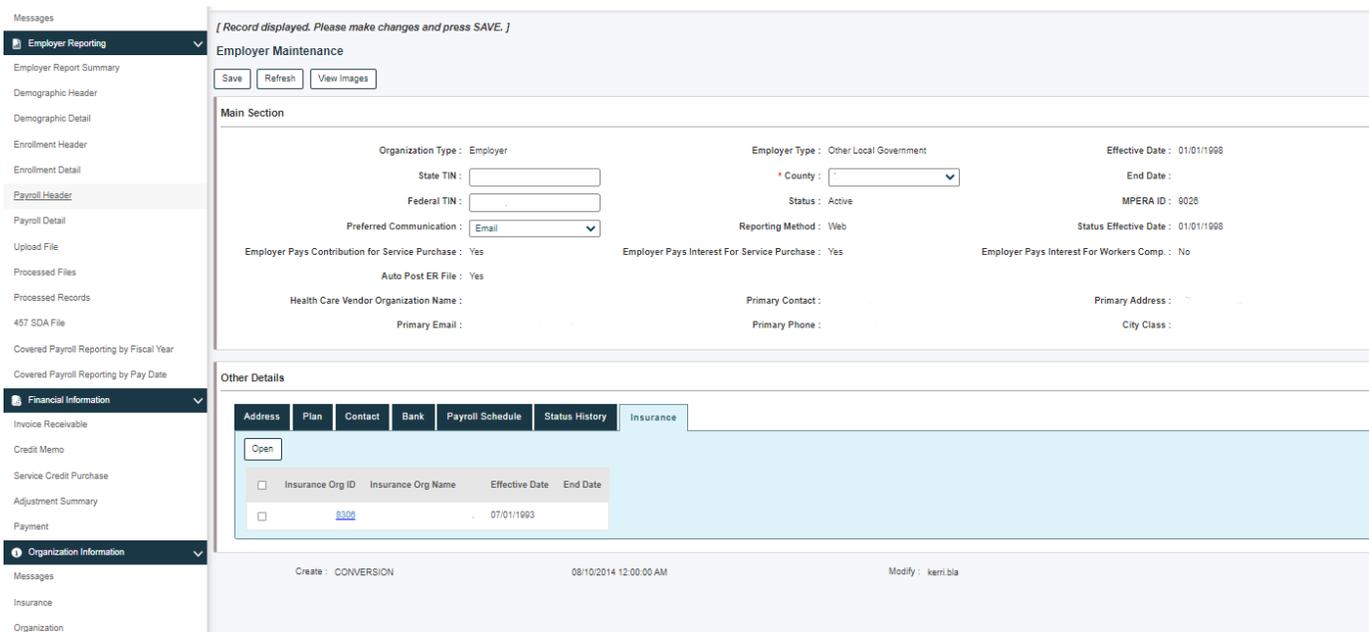


# Changing an Existing Insurance Rate

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



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



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

**Organization Insurance Maintenance**

Save Refresh Execute Refresh From Object

**Organization Information**

Organization ID : Organization Name :

---

**Insurance Details**

Insurance Organization ID : 5095

\* Insurance Organization :  Insurance Organ

\* Effective Date : 07/01/1993

Description :

**Insurance Plans**

Plan ID :  Effective Date :

New Open Export to Excel

| <input type="checkbox"/> | Plan ID | Plan Effective Date | Plan End Date | Current Plan Rate | Future Plan Effective Date | Future Plan Rate | Status   |
|--------------------------|---------|---------------------|---------------|-------------------|----------------------------|------------------|----------|
| <input type="checkbox"/> | 8701    | 12/02/2021          |               | \$500.00          |                            | \$0.00           | Approved |
| <input type="checkbox"/> | 8801    | 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 :

---

**Insurance Details**

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                             |
|--------------------------|---|---------------------------------------|
| <input type="checkbox"/> | 03/10/2021                              | \$974.00                              |
| <input type="checkbox"/> | <input type="text" value="12/02/2021"/> | <input type="text" value="\$950.00"/> |

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**Other Details**

Errors Status History

| <input type="checkbox"/> | 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

Messages

Employer Reporting

Employer Report Summary

Demographic Header

Demographic Detail

Enrollment Header

Enrollment Detail

Payroll Header

Payroll Detail

Upload File

Processed Files

Processed Records

457 SDA File

Covered Payroll Reporting by Fiscal Year

Covered Payroll Reporting by Pay Date

Financial Information

Invoice Receivable

Credit Memo

Service Credit Purchase

Adjustment Summary

Payment

Organization Information

Messages

Insurance

Organization

Insurance Maintenance

[All changes successfully saved.]

Refresh

Retiree Insurance Criteria

Person ID :

Insurance Organization :

Plan ID :

Status :

Search

Retiree Insurance Results

New Open Export To Excel

| <input type="checkbox"/> | Retiree Insurance ID  | Person ID | Person Name | Insurance Organization ID | Insurance Organization Name | Plan ID | Effective Date | End Date | Current Rate | Future Rate | Status        |
|--------------------------|-----------------------|-----------|-------------|---------------------------|-----------------------------|---------|----------------|----------|--------------|-------------|---------------|
| <input type="checkbox"/> | <a href="#">24510</a> |           |             | <a href="#">8308</a>      |                             | 008801  | 03/10/2021     |          | \$950.00     | \$0.00      | Pending Batch |

Create :