



Guided Practice 13

Processing Retiree Insurance Deductions

September 20, 2017

This guide will walk you through:

- [Global rate changes](#)
- [Initial enrollments](#)
- [Change enrollments](#)
- [Retroactive coverage](#)
- [Correction enrollments](#)
- [Cancellation enrollments](#)

This guided practice assumes you already know how to:

- Log in to MyTRS

For additional information and troubleshooting please contact insuranceupdates@trb.state.ma.us

For employers who offer insurance coverage to retirees, the MTRS provides direct access to set up, change, correct and cancel deductions from each retiree's benefits using the Retiree Insurance options in MyTRS. Retiree insurance coverage changes can be entered in real time, prospectively or retroactively as needed, and deductions are processed on a monthly basis as part of our retirement warrant process.

There are four processing options to choose from:

1. [Cancel enrollment](#) – Used to stop participation in a plan in cases where a replacement option is not selected.
2. [Change enrollment](#) – Allows the user to switch health plans, add additional coverage, delete current options or to correct enrollment effective dates as needed.
3. [Correct enrollment](#) – Allows a user to correct only enrollment effective dates, when no other changes are needed.
4. [Initial enrollment](#) – Allows a user to setup a retiree's initial insurance coverage options. Once a retiree has had their first insurance deduction, this function cannot be used to add or change coverage plans or dates (use Change Enrollment).

The MTRS processes several types of insurance deductions in the following categories:

1. **Medical** – This is the retiree’s primary medical insurance.
2. **Second Medical** – This allows the retiree to have multiple medical options deducted at the same time. This is typically used when a retiree’s spouse or dependent is covered under the employer’s insurance plan but has different coverage than the retiree.
3. **Third Medical** – This works the same way as second medical, but allows for a third coverage option. This field is seldom used.
4. **Dental** – Insurance for dental purposes only.
5. **Vision** – Insurance for vision coverage only.
6. **Life** – Life insurance, usually a group policy offering retirees minimum coverage.
7. **Optional Life** – Supplemental life insurance that employers may offer to retirees who wish to have coverage above the minimal coverage.

Notes:

- When listing coverage in the Medical, Second Medical and Third Medical fields, there is no significance to the order, but some coverage options haven’t been made available as second and third medical options (to minimize annual rate maintenance). If a new option is needed in either the Second Medical or Third Medical field that isn’t available in your menu, please [email](#) the Insurance Updates group and we can add it in for you.
- **You can only choose one plan option under each section;** you can only select one plan under Medical and one plan under Second Medical, etc.

Global Premium Changes

[Global premium changes](#) can only be completed by MTRS staff.

When the MTRS enters global premium changes for employers into MyTRS, an overnight batch process is triggered that:

- Identifies that employer's retirees or survivors with that plan coverage ,
- Enters a stop date on the existing rate event, and
- Creates a new premium rate event for the same plan at the new cost, effective as of the date of the new premium rate.

This process enables MyTRS to globally update the rate for all affected benefit recipients, thereby eliminating the need for the employer to manually update each retiree each year. Keeping the rate history also allows MyTRS to calculate rebills properly when needed.

When you're selecting a plan for a retiree as described later in this guide, MyTRS sets the rate based on the coverage effective date. If you are adding coverage that spans a time period where there has been a rate change, you will have to make two entries. One entry will be for the time period at the older rate and one for the period at the newer rate.

Initial Enrollment

To setup insurance deductions for the first time for a retiree, use the following steps.

1. Select “Individual Retiree Insurance Selections” from the home page or from the “Go To” drop down list at the top of the page.



Retiree Insurance

- [Individual Retiree Insurance Selections](#) **1**
- [View Retiree Insurance Deduction History](#)
- [View Insurance Premium Rates](#)
- [Insurance Deduction Reports](#)

2. Enter the retiree’s name (last, first) or Social Security number (SSN) in the “Select Member” field and click **Search**.



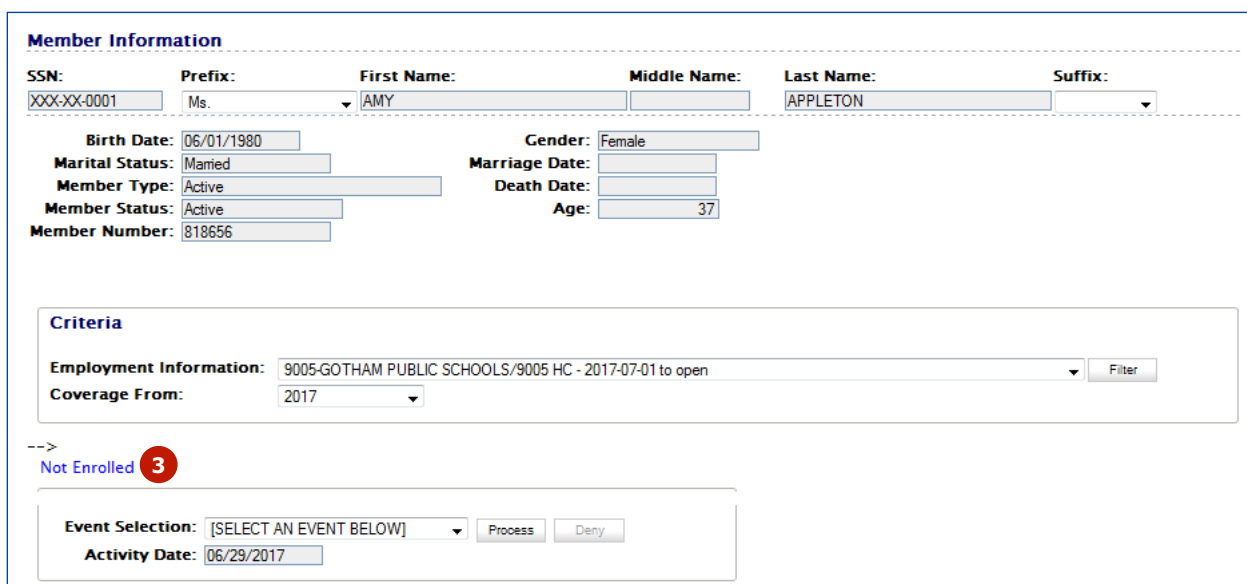
Home » Retiree Insurance » Individual Retiree Insurance Selections

Member Insurance Maintenance Introduction Select Options Select Covered Persons Confirm Selection Confirmation

Select Member: appleton **2** Search Cancel

If your search returns multiple members, select the correct one from the list provided.

3. When the retiree’s insurance coverage page is displayed, you will see that it says “Not Enrolled” above the “Event Selection” drop down list.



Member Information

SSN: XXX-XX-0001 Prefix: Ms. First Name: AMY Middle Name: Last Name: APPLETON Suffix:

Birth Date: 06/01/1980 Gender: Female

Marital Status: Married Marriage Date:

Member Type: Active Death Date:

Member Status: Active Age: 37

Member Number: 818656

Criteria

Employment Information: 9005-GOTHAM PUBLIC SCHOOLS/9005 HC - 2017-07-01 to open Filter

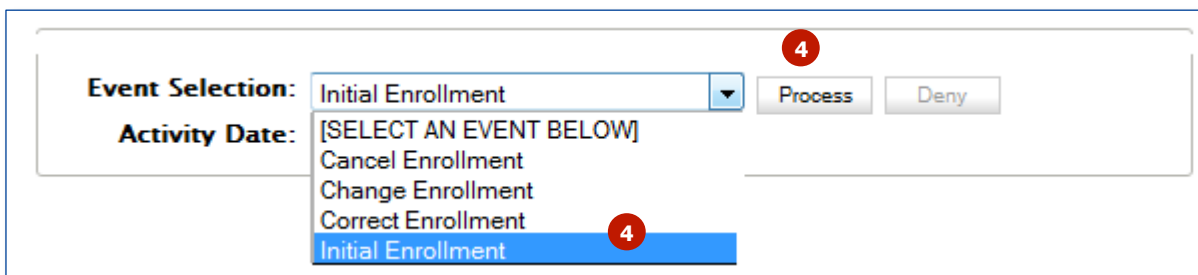
Coverage From: 2017

--> **Not Enrolled** **3**

Event Selection: [SELECT AN EVENT BELOW] Process Deny

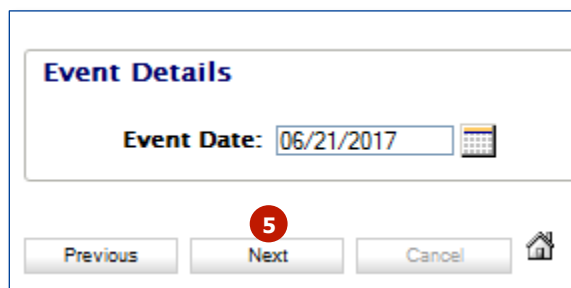
Activity Date: 06/29/2017

4. Select "Initial Enrollment" from the "Event Selection" drop down list and click **Process**.



The screenshot shows a web form with two labels: "Event Selection:" and "Activity Date:". The "Event Selection:" dropdown menu is open, displaying a list of options: "[SELECT AN EVENT BELOW]", "Cancel Enrollment", "Change Enrollment", "Correct Enrollment", and "Initial Enrollment". The "Initial Enrollment" option is highlighted in blue. A red circle with the number "4" is positioned above the "Process" button, which is located to the right of the dropdown menu.

5. On the "Introduction" tab, the "Event Date" field will pre-populate with today's date. **Change this date to the coverage start date.** Click **Next** to proceed to Step 2.



The screenshot shows a web form titled "Event Details". It contains a label "Event Date:" followed by a text input field containing the date "06/21/2017" and a calendar icon. Below the input field, there are three buttons: "Previous", "Next", and "Cancel". A red circle with the number "5" is positioned above the "Next" button. A home icon is located to the right of the "Cancel" button.

6. On the “Select Options” tab, check the “Select” box to the left of the plan(s) that the retiree has chosen.

*Reminder: **You can only choose one plan option under each section;** you can only select one plan under Medical and one plan under Second Medical, etc.*

7. Click **Next** at the bottom of the page.

You have the following choice(s):

Medical

Select	Insurance Carrier	Insurance Plan	Plan Coverage	Insurance Group	Premium
<input type="checkbox"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS – BLUE SHIELD (BC)	Family	Retired	\$550.00
<input type="checkbox"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS – BLUE SHIELD (BC)	Individual	Retired	\$250.00
<input type="checkbox"/>	HARVARD PILGRIM HEALTH	HARVARD-PILGRIM ENHANCED (HPE)	Senior (S)	Retired	\$120.00
<input type="checkbox"/>	HARVARD PILGRIM HEALTH	HARVARD-PILGRIM HMO (HPH)	Family	Retired	\$450.00
<input checked="" type="checkbox"/>	HARVARD PILGRIM HEALTH	HARVARD-PILGRIM HMO (HPH)	Individual	Retired	\$210.00
<input type="checkbox"/>	MEDEX HEALTH	MEDEX (MX)	Senior (S)	Retired	\$100.00

Second Medical

Select	Insurance Carrier	Insurance Plan	Plan Coverage	Insurance Group	Premium
<input type="checkbox"/>	HARVARD PILGRIM HEALTH	HARVARD-PILGRIM ENHANCED (HPE)	Senior (S)	Retired	\$120.00
<input checked="" type="checkbox"/>	MEDEX HEALTH	MEDEX (MX)	Senior (S)	Retired	\$100.00

Vision

Select	Insurance Carrier	Insurance Plan	Plan Coverage	Insurance Group	Premium
<input checked="" type="checkbox"/>	EyeMed Vision	EyeMed Vision Plan	Individual	Retired	\$12.00
<input type="checkbox"/>	EyeMed Vision	EyeMed Vision Plan	Family	Retired	\$28.00

Dental

Select	Insurance Carrier	Insurance Plan	Plan Coverage	Insurance Group	Premium
<input type="checkbox"/>	ALTUS DENTAL	ALTUS DENTAL (ALT)	Family	Retired	\$75.00
<input checked="" type="checkbox"/>	ALTUS DENTAL	ALTUS DENTAL (ALT)	Individual	Retired	\$30.00

Basic Life

Select	Insurance Carrier	Insurance Plan	Plan Coverage	Insurance Group	Premium
<input checked="" type="checkbox"/>	BASIC LIFE	BASIC LIFE (2000)	Individual	Retired	\$2.25

Optional Life

Select	Insurance Carrier	Insurance Plan	Plan Coverage	Insurance Group	Premium
<input type="checkbox"/>	NOT APPLICABLE	OPTIONAL LIFE (1000)	Individual	Retired	\$10.00
<input type="checkbox"/>	NOT APPLICABLE	OPTIONAL LIFE (1550)	Individual	Retired	\$15.50
<input type="checkbox"/>	NOT APPLICABLE	OPTIONAL LIFE (2000)	Individual	Retired	\$20.00
<input checked="" type="checkbox"/>	NOT APPLICABLE	OPTIONAL LIFE (550)	Individual	Retired	\$5.50

7

Previous

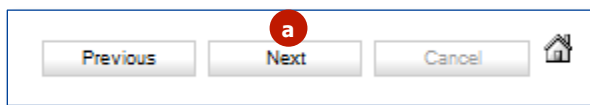
Next

Cancel

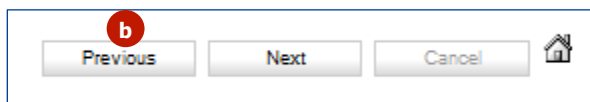
8. On the “Select Covered Persons” tab, confirm that the coverage “Start Date” is correct. Make any changes that might be necessary.

Note: MyTRS pre-populates the coverage start date based on your retiree’s first coverage eligibility date (usually their retirement date); however, most retiree coverage starts months after the retirement date because:

1. your retiree was still covered as an active employee when first retired, or
 2. you took coverage payments directly from the retiree to cover them while their retirement application was processed.
- a. If the plans and start dates are correct, click **Next** at the bottom of the page.

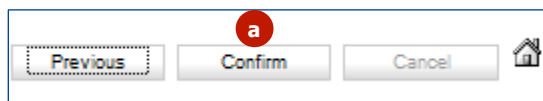


- b. If any of the plans need to be changed, click **Previous** at the bottom of the page to go back and make new selections.

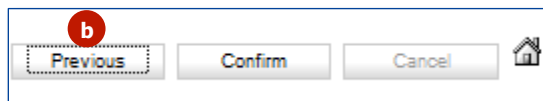


9. On the “Confirm Selection” tab, ensure everything is correct.

- a. If everything is correct, click **Confirm** at the bottom of the page.



- b. If any changes need to be made to a plan or start date, click **Previous** at the bottom of the page to go back and make edits.



10. On the “Confirmation” tab, click the Home icon (🏠) in the bottom left corner of the page to complete the process.

Basic Life

Enrollment Option	Start Date	Stop Date	Premium
BASIC LIFE / BASIC LIFE (2000) / Individual / Retired	07/01/2017		\$2.25
Enrollee			
APPLETON, AMY	Member		

Optional Life

Enrollment Option	Start Date	Stop Date	Premium
NOT APPLICABLE / OPTIONAL LIFE (550) / Individual / Retired	07/01/2017		\$5.50
Enrollee			
APPLETON, AMY	Member		

10 🏠

Change Enrollment

To change an insurance plan for a currently enrolled retiree (e.g., changing from one medical plan to another), use the following steps:

1. Select “Individual Retiree Insurance Selections” from the home page or from the “Go To” drop down list at the top of the page.



2. Enter the retiree’s name (last, first) or Social Security number (SSN) in the “Select Member” field and click **Search**.



If your search returns multiple members, select the correct one from the list provided.

3. When the retiree's insurance coverage page is displayed, you will see their current and past coverage selections for the current year. At the bottom of the page you will also see the "Event Selection" drop down list.

This screen defaults to show only the current year plans, but this can be changed by selecting "All" from the "Coverage From" drop down list and then clicking **Filter**.

Criteria

Employment Information: 9005-GOTHAM PUBLIC SCHOOLS/9005 HC - 2017-07-01 to open

Coverage From: 2017

Filter

Medical

Enrollment Option	Start Date	Stop Date	Premium
HARVARD PILGRIM HEALTH / HARVARD-PILGRIM HMO (HPH) / Individual / Retired	07/01/2017		\$210.00
Enrollee			
APPLETON, AMY	Member		

Second Medical

Enrollment Option	Start Date	Stop Date	Premium
MEDEX HEALTH / MEDEX (MX) / Senior (S) / Retired	07/01/2017		\$100.00
Enrollee			
APPLETON, AMY	Member		

Vision

Enrollment Option	Start Date	Stop Date	Premium
EyeMed Vision / EyeMed Vision Plan / Individual / Retired	07/01/2017		\$12.00
Enrollee			
APPLETON, AMY	Member		

Dental

Enrollment Option	Start Date	Stop Date	Premium
ALTUS DENTAL / ALTUS DENTAL (ALT) / Individual / Retired	07/01/2017		\$30.00
Enrollee			
APPLETON, AMY	Member		

Basic Life

Enrollment Option	Start Date	Stop Date	Premium
BASIC LIFE / BASIC LIFE (2000) / Individual / Retired	07/01/2017		\$2.25
Enrollee			
APPLETON, AMY	Member		

4. Select “Change Enrollment” from the “Event Selection” drop down list and click **Process**.

Event Selection: Change Enrollment ▼

Activity Date: [SELECT AN EVENT BELOW]

- Cancel Enrollment
- Change Enrollment** (4)
- Correct Enrollment
- Initial Enrollment

Process (4) Deny

5. On the “Introduction” tab, the “Event Date” field will pre-populate with today’s date. **Change this date to the coverage start date.** Click **Next** to proceed to Step 2.

Event Details

Event Date: 06/21/2017

Previous Next (5) Cancel

6. On the “Select Options” tab, the current plans are displayed at the top of the page. The available options are displayed at the bottom of the page. Check the “Select” box to the left of the new plan(s) that the retiree has chosen.

You have the following choice(s):

Medical

Select	Insurance Carrier	Insurance Plan	Plan Coverage	Insurance Group	Premium
<input type="checkbox"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	Retired	\$550.00
<input type="checkbox"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	Retired	\$250.00
<input type="checkbox"/>	HARVARD PILGRIM HEALTH	HARVARD-PILGRIM ENHANCED (HPE)	Senior (S)	Retired	\$120.00
<input type="checkbox"/>	HARVARD PILGRIM HEALTH	HARVARD-PILGRIM HMO (HPH)	Family	Retired	\$450.00
<input checked="" type="checkbox"/> (6)	MEDEX HEALTH	MEDEX (MX)	Senior (S)	Retired	\$100.00

7. Once you’ve selected the appropriate option(s), click **Next** at the bottom of the page.

Previous Next (7) Cancel

8. On the “Selected Covered Persons” tab, enter the coverage dates that apply.
- Enter the “Stop Date” for the existing coverage. The “Stop Date” is the last day of the coverage month. In this example, it would be 07/31/2017.

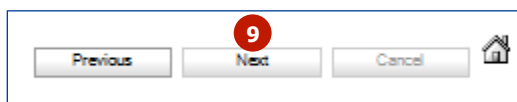


Do not delete the old coverage. If you delete the old coverage by clicking on the red X under “Add / Delete”, the retiree will automatically be refunded any deductions previously taken for that plan going back to 10/01/2013.

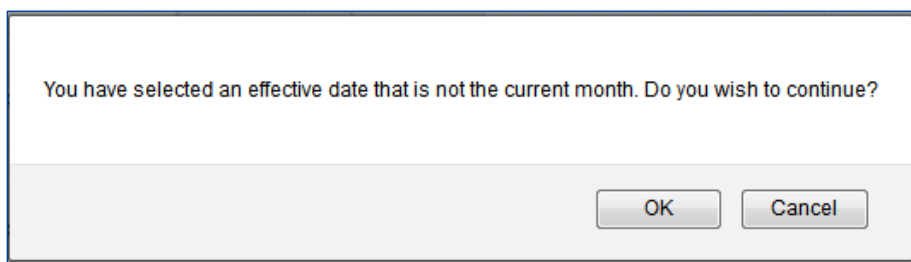
- Enter the “Start Date” for the new coverage. The “Start Date” is the first day of the coverage month. So, if coverage starts in August the “Start Date” should be 08/01/2017.

Medical			
Enrollment Option	Start Date	Stop Date	Add / Delete
HARVARD PILGRIM HEALTH / HARVARD-PILGRIM HMO (HPH) / Individual / Retired Enrollee	07/01/2017	07/31/2017 a	X
APPLETON, AMY Member			
MEDEX HEALTH / MEDEX (MX) / Senior (S) / Retired	08/01/2017 b	/ /	X
APPLETON, AMY Member			

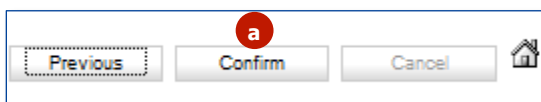
9. Click **Next** at the bottom of the screen.



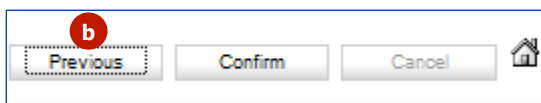
If you are backdating coverage to a month prior to the current month, you will see the following message:



- a. If the dates are correct, click **OK**.
 - b. If the dates are incorrect or you are not sure, click **Cancel**.
 - a. Fix the dates if needed and then click **Next**.
 - b. Click **OK** when the above message is displayed again.
10. On the “Confirm Selection” tab, ensure everything is correct.
- a. If everything is correct, click **Confirm** at the bottom of the page.



- b. If any changes need to be made to a plan or start date, click **Previous** at the bottom of the page to go back and make edits.



11. On the “Confirmation” tab, click the Home icon (🏠) in the bottom left corner to complete the process.

Basic Life

Enrollment Option	Start Date	Stop Date	Premium
BASIC LIFE / BASIC LIFE (2000) / Individual / Retired	07/01/2017		\$2.25
Enrollee			
APPLETON, AMY	Member		

Optional Life

Enrollment Option	Start Date	Stop Date	Premium
NOT APPLICABLE / OPTIONAL LIFE (550) / Individual / Retired	07/01/2017		\$5.50
Enrollee			
APPLETON, AMY	Member		

11 🏠

Entering Retroactive Coverage

If you are entering retroactive coverage with a start date PRIOR to a new rate going into effect, you will need to add two lines of coverage so that the retiree will be charged appropriately.


1. The first line will be for the coverage for the time period **prior to the new rate** taking effect (e.g., coverage 04/01/2017-06/30/2017).
 - a. Select the plan from the available list.

You have the following choice(s):




Medical


Select	Insurance Carrier	Insurance Plan	Plan Coverage	Insurance Group	Premium
<input type="checkbox"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	Retired	\$550.00
<input type="checkbox"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	Retired	\$250.00
<input type="checkbox"/>	HARVARD PILGRIM HEALTH	HARVARD-PILGRIM ENHANCED (HPE)	Senior (S)	Retired	\$120.00
<input type="checkbox"/>	HARVARD PILGRIM HEALTH	HARVARD-PILGRIM HMO (HPH)	Family	Retired	\$450.00
<input checked="" type="checkbox"/>	MEDEX HEALTH	MEDEX (MX)	Senior (S)	Retired	\$100.00

- b. Click **Next**.


Previous **Next** Cancel 

- c. Enter the appropriate date in the "Start Date" field and click **Next**. 04/01/2017 is the start date in this example.

Enrollment Option	Start Date	Stop Date	Add / Delete
MEDEX HEALTH / MEDEX (MX) / Senior (S) / Retired	04/01/2017 	/ / 	
Enrollee			
APPLETON, AMY	Member		

Previous **Next** Cancel 


- d. On the "Confirm Selection" tab, ensure everything is correct and click **Confirm**.

Previous **Confirm** Cancel 


- e. On the “Confirmation” tab, click the Home icon () in the bottom left corner of the page to complete the process.

Medical

Enrollment Option	Start Date	Stop Date	Premium
MEDEX HEALTH / MEDEX (MX) / Senior (S) / Retired	04/01/2017		\$0.00
Enrollee			
APPLETON, AMY	Member		

e 

- f. Select “Cancel Enrollment” from the “Event Selection” drop down list and click **Process**.


Event Selection: Cancel Enrollment  **Process** **Deny**


Activity Date: [SELECT AN EVENT BELOW]

- f** Cancel Enrollment
- Change Enrollment
- Correct Enrollment
- Initial Enrollment


- g. On the “Introduction” tab, the “Event Date” field will pre-populate with today’s date. Click **Next**.

Event Details




Event Date: 06/21/2017 

g **Previous** **Next** **Cancel** 

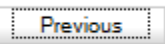
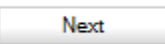


- h. On the “Select Options” tab, click **Next**.

h **Previous** **Next** **Cancel** 


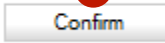
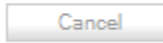

- i. On the “Select Covered Persons” tab, enter the appropriate “Stop Date” on the coverage that is ending. This should be the last day of the coverage month. The Stop Date in this example is 06/30/2017.

Medical			
Enrollment Option	Start Date	Stop Date	Add / Delete
MEDEX HEALTH / MEDEX (MX) / Senior (S) / Retired	04/01/2017	06/30/2017 	 
Enrollee			
APPLETON, AMY	Member		

- j. Click **Next**.







- k. On the “Confirmation Selection” tab, click **Confirm**.

- l. On the “Confirmation” tab, click the **Home** icon () in the bottom left corner to complete the process.

Medical			
Enrollment Option	Start Date	Stop Date	Premium
MEDEX HEALTH / MEDEX (MX) / Senior (S) / Retired	04/01/2017	06/30/2017	\$0.00
Enrollee			
APPLETON, AMY	Member		



2. The second line will be for the coverage period **after the rate change** took effect (e.g., coverage starting 07/01/2017).
 - a. Select “Change Enrollment” from the “Event Selection” drop down list and click **Process**.

Event Selection: Change Enrollment Process Deny

Activity Date: [SELECT AN EVENT BELOW]

- Cancel Enrollment
- Change Enrollment** (a)
- Correct Enrollment
- Initial Enrollment

- b. On the “Introduction” tab, the “Event Date” field will pre-populate with today’s date. Click **Next** to proceed to Step 2.

Event Details

Event Date: 06/21/2017

Previous **Next** (b) Cancel

- c. On the “Select Options” tab, the current plans are displayed at the top of the page. The available options are displayed at the bottom of the page. Check the “Select” box to the left of the new plan(s) that the retiree has chosen.

You have the following choice(s):

Medical







Select	Insurance Carrier	Insurance Plan	Plan Coverage	Insurance Group	Premium
<input type="checkbox"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	Retired	\$550.00
<input type="checkbox"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	Retired	\$250.00
<input type="checkbox"/>	HARVARD PILGRIM HEALTH	HARVARD-PILGRIM ENHANCED (HPE)	Senior (S)	Retired	\$120.00
<input type="checkbox"/>	HARVARD PILGRIM HEALTH	HARVARD-PILGRIM HMO (HPH)	Family	Retired	\$450.00
<input checked="" type="checkbox"/> (c)	MEDEX HEALTH	MEDEX (MX)	Senior (S)	Retired	\$100.00

- d. Once you’ve selected the appropriate option(s), click **Next** at the bottom of the page.

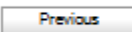



Previous **Next** (d) Cancel

- e. On the “Selected Covered Persons” tab, enter the appropriate date in the “Start Date” field. In this example 07/01/2017 is the “Start Date”.

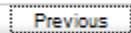
Medical

Enrollment Option	Start Date	Stop Date	Add / Delete
MEDEX HEALTH / MEDEX (MX) / Senior (S) / Retired	04/01/2017 	06/30/2017 	
Enrollee			
APPLETON, AMY	Member		
MEDEX HEALTH / MEDEX (MX) / Senior (S) / Retired	07/01/2017 	/ / 	
APPLETON, AMY	Member		

- f. Click **Next** at the bottom of the screen.


- g. On the “Confirm Selection” tab, ensure everything is correct and click **Confirm**.

- h. On the “Confirmation” tab, click the **Home** icon () in the bottom left corner to complete the process.

Medical

Enrollment Option	Start Date	Stop Date	Premium
MEDEX HEALTH / MEDEX (MX) / Senior (S) / Retired	07/01/2017		\$100.00
Enrollee			
APPLETON, AMY	Member		
MEDEX HEALTH / MEDEX (MX) / Senior (S) / Retired	04/01/2017	06/30/2017	\$0.00
Enrollee			
APPLETON, AMY	Member		



Note:

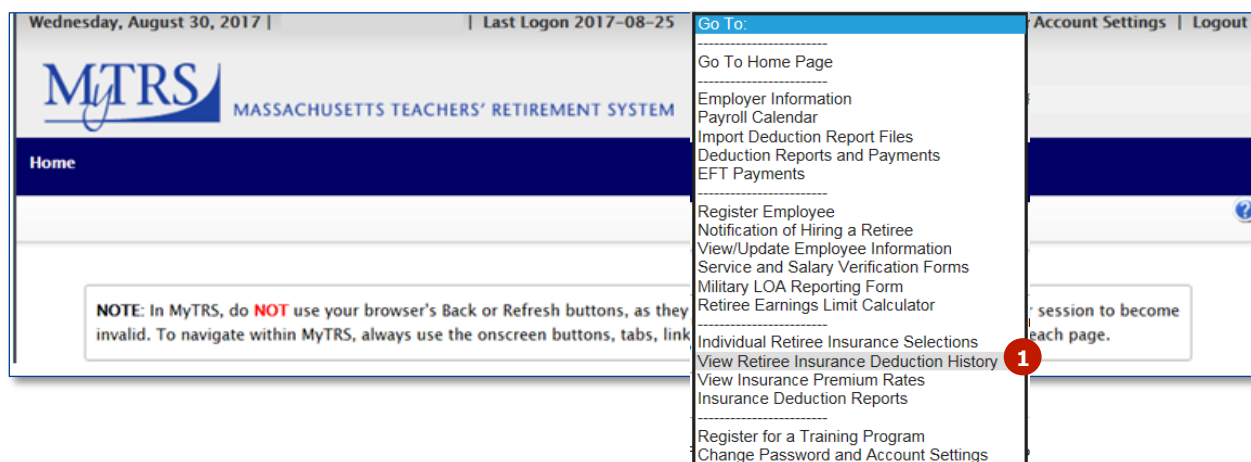
If you are adding coverage with a start date prior to today's date, you will need to change the "Event Date" on the "Introduction" tab. The date should be change to the coverage start date. In this example the coverage being entered has a start date of 03/01/2017.

The screenshot displays a web application interface for managing retiree insurance. The top navigation bar includes the breadcrumb 'Home > Retiree Insurance > Individual Retiree Insurance Selections' and a series of tabs: 'Member Insurance Maintenance', 'Introduction' (which is the active tab), 'Select Options', 'Select Covered Persons', 'Confirm Selection', and 'Confirmation'. Below the tabs, the user information is shown as 'Employee/Member: APPLETON, AMY (New Search)' and 'SSN: XXX-XX-0001'. The main content area is titled 'Step 1 of 5:' and contains a section labeled 'Event Details'. Within this section, the 'Event Date' is set to '03/01/2017' next to a calendar icon. At the bottom of the form, there are three buttons: 'Previous', 'Next', and 'Cancel', along with a small house icon representing a home button.

If you are entering a retroactive coverage change that requires the retiree to be refunded or billed extra, MyTRS will automatically make this deduction adjustment for you when the next benefit warrant is processed.

To review the retiree's account and to verify that the adjustment (rebill) is correct:

1. Select "View Retiree Insurance Deduction History" from the "Go to" drop down list at the top of the page.



2. Enter the retiree's name (last, first) or Social Security number (SSN) in the "Select Member" field and click **Search**.



If your search returns multiple members, select the correct one from the list provided.

3. Under the "Identifier" field, you will want to look at the row that says "Rebill".

<div>View Trans. New Misc. Reports</div> <div> Sort Columns View Row Records Print Export </div>													
Active	Transaction Date	Activity Date	Type	Status	Identifier	Trans#	Med Total	Vision	Dental	Life Total	GIC-M Balance	GIC-D Balance	Total Balance
<input type="radio"/>	08/25/2017	02/01/2017	Member Bill	Open	Rebill for 02/01/2017 - 07/31/2017	8133280	\$1.61	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1.61
<input type="radio"/>	06/20/2017	06/20/2017	Disbursement Deduction	Closed	Disb Request	8045015	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<input type="radio"/>	06/20/2017	06/20/2017	Disbursement Deduction	Closed	Disb Request	8045016	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<input type="radio"/>	06/20/2017	07/01/2017	Member Bill	Closed	EBILL for 07/01/2017 - 07/31/2017	8015116	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<input type="radio"/>	06/14/2017	07/01/2016	Member Bill	Closed	Rebill for 07/01/2016 - 06/30/2017	7960010	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
													\$1.61

For more information on the Retiree Insurance Deduction History screen, see [GP14: Checking Retiree Insurance Deduction History](#).

Replacing one plan for another with the same start date

In cases in which you are entering a new plan for a retiree that replaces an existing plan with the same start date, you will need to delete the existing record before you can add the replacement plan.

1. Select "Change Enrollment" from the "Event Selection" drop down list and click **Process**.

Event Selection: Change Enrollment [v] Process Deny

Activity Date: [SELECT AN EVENT BELOW]

- Cancel Enrollment
- Change Enrollment** 1
- Correct Enrollment
- Initial Enrollment

2. On the "Introduction" tab, the "Event Date" field will pre-populate with today's date. Click **Next** to proceed to Step 2.

Event Details

Event Date: 06/21/2017

Previous **Next** 2 Cancel


3. On the "Select Options" tab, the current plans are displayed at the top of the page. The available options are displayed at the bottom of the page. Check the "Select" box to the left of the new plan(s) that the retiree has chosen.

You have the following choice(s):




Medical

Select	Insurance Carrier	Insurance Plan	Plan Coverage	Insurance Group	Premium
<input checked="" type="checkbox"/> 3	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	Retired	\$550.00
<input type="checkbox"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	Retired	\$250.00
<input type="checkbox"/>	HARVARD PILGRIM HEALTH	HARVARD-PILGRIM ENHANCED (HPE)	Senior (S)	Retired	\$120.00
<input type="checkbox"/>	HARVARD PILGRIM HEALTH	HARVARD-PILGRIM HMO (HPH)	Family	Retired	\$450.00
<input type="checkbox"/>	MEDEX HEALTH	MEDEX (MX)	Senior (S)	Retired	\$100.00

4. Click **Next**.


5. Next to the plan you want to delete, click the red X () under the “Add/Delete” column.

Medical

Enrollment Option	Start Date	Stop Date	Add / Delete
MEDEX HEALTH / MEDEX (MX) / Senior (S) / Retired Enrollee APPLETON, AMY Member	08/01/2017	//	
HARVARD PILGRIM HEALTH / HARVARD-PILGRIM HMO (HPH) / Individual / Retired Enrollee APPLETON, AMY Member	07/01/2017	07/31/2017	
BLUE CROSS BLUE SHIELD / BLUE CROSS – BLUE SHIELD (BC) / Family / Retired APPLETON, AMY Member	08/01/2017	//	

6. Add the appropriate “Start Date” for the new plan.

Medical

Enrollment Option	Start Date	Stop Date	Add / Delete
BLUE CROSS BLUE SHIELD / BLUE CROSS – BLUE SHIELD (BC) / Family / Retired APPLETON, AMY Member	08/01/2017	//	

7. Click **Next**.

8. On the “Confirm Selection” tab, click **Confirm**.

9. On the “Confirmation” tab, click the Home icon (🏠) in the bottom left corner to complete the process.

Basic Life

Enrollment Option	Start Date	Stop Date	Premium
BASIC LIFE / BASIC LIFE (2000) / Individual / Retired	07/01/2017		\$2.25
Enrollee			
APPLETON, AMY	Member		

Optional Life

Enrollment Option	Start Date	Stop Date	Premium
NOT APPLICABLE / OPTIONAL LIFE (550) / Individual / Retired	07/01/2017		\$5.50
Enrollee			
APPLETON, AMY	Member		

9 🏠

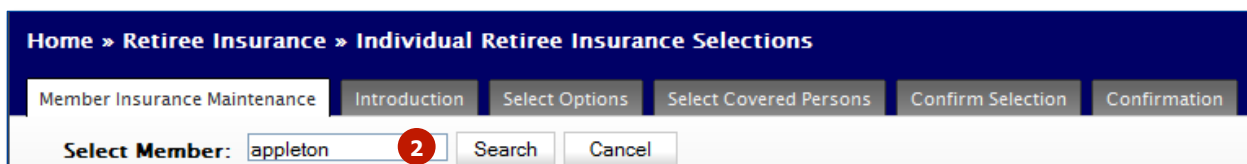
Correct Enrollment

The Correct Enrollment function is used only for start and/or stop date changes. You would not want to use the function if you also need to update a retiree's coverage options.

1. Select "Individual Retiree Insurance Selections" from the home page or from the "Go To" drop down list at the top of the page.



2. Enter the retiree's name (last, first) or Social Security number (SSN) in the "Select Member" field and click **Search**.



If your search returns multiple members, select the correct one from the list provided.

3. When the retiree's insurance coverage page is displayed, you will see their current and past coverage selections for the current year. At the bottom of the page you will also see the "Event Selection" drop down list.

This screen defaults to show only the current year plans, but this can be changed by selecting "All" from the "Coverage From" drop down list.

Criteria

Employment Information: 9005-GOTHAM PUBLIC SCHOOLS/9005 HC - 2017-07-01 to open Filter

Coverage From: 2017

Medical

Enrollment Option	Start Date	Stop Date	Premium
HARVARD PILGRIM HEALTH / HARVARD-PILGRIM HMO (HPH) / Individual / Retired	07/01/2017		\$210.00
Enrollee			
APPLETON, AMY	Member		

Second Medical

Enrollment Option	Start Date	Stop Date	Premium
MEDEX HEALTH / MEDEX (MX) / Senior (S) / Retired	07/01/2017		\$100.00
Enrollee			
APPLETON, AMY	Member		

Vision

Enrollment Option	Start Date	Stop Date	Premium
EyeMed Vision / EyeMed Vision Plan / Individual / Retired	07/01/2017		\$12.00
Enrollee			
APPLETON, AMY	Member		

Dental

Enrollment Option	Start Date	Stop Date	Premium
ALTUS DENTAL / ALTUS DENTAL (ALT) / Individual / Retired	07/01/2017		\$30.00
Enrollee			
APPLETON, AMY	Member		

Basic Life

Enrollment Option	Start Date	Stop Date	Premium
BASIC LIFE / BASIC LIFE (2000) / Individual / Retired	07/01/2017		\$2.25
Enrollee			
APPLETON, AMY	Member		

4. Select “Correct Enrollment” from the “Event Selection” drop down list and click **Process**.

Event Selection: Correct Enrollment [v] Process Deny

Activity Date: [SELECT AN EVENT BELOW]

Cancel Enrollment

Change Enrollment

Correct Enrollment 4

Initial Enrollment

5. On the “Introduction” tab, the “Event Date” field will pre-populate with today’s date. Click **Next** to proceed to Step 2.

Event Details

Event Date: 06/21/2017

Previous **Next** 5 Cancel

6. On the “Select Options” tab, click **Next**.

Previous **Next** 6 Cancel

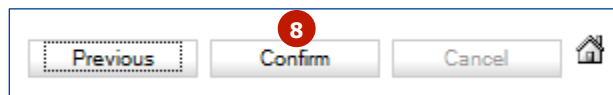
7. On the “Select Covered Persons” tab, correct the date (s) that need to be updated and click **Next**.


Dental

Enrollment Option	Start Date	Stop Date	Add / Delete
ALTUS DENTAL / ALTUS DENTAL (ALT) / Individual / Retired	08/01/2017 7	//	x
Enrollee			
APPLETON, AMY	Member		

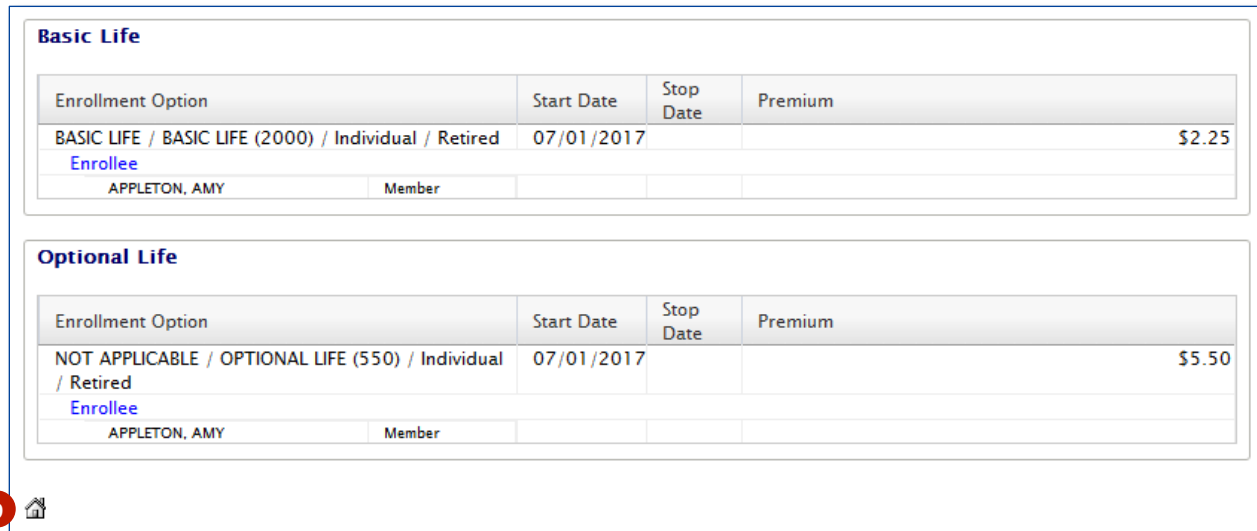
Previous **Next** 7 Cancel

8. On the “Confirm Selection” tab, click **Confirm**.



Previous Confirm Cancel 

9. On the “Confirmation” tab, click the Home icon () in the bottom left corner to complete the process.




Basic Life

Enrollment Option	Start Date	Stop Date	Premium
BASIC LIFE / BASIC LIFE (2000) / Individual / Retired	07/01/2017		\$2.25
Enrollee			
APPLETON, AMY	Member		

Optional Life

Enrollment Option	Start Date	Stop Date	Premium
NOT APPLICABLE / OPTIONAL LIFE (550) / Individual / Retired	07/01/2017		\$5.50
Enrollee			
APPLETON, AMY	Member		

9 

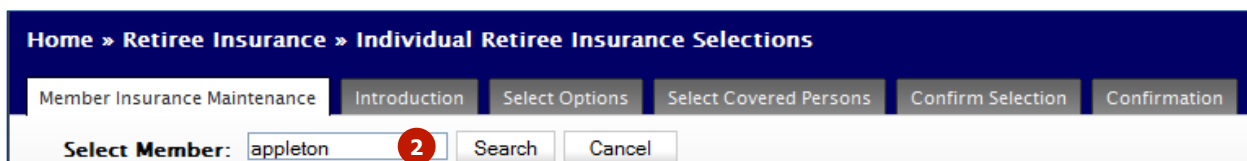
Cancel Enrollment

The Cancel Enrollment function is used to stop insurance coverage for a retiree where no replacement plan will be assigned.

1. Select “Individual Retiree Insurance Selections” from the home page or from the “Go To” drop down list at the top of the page.



2. Enter the retiree’s name (last, first) or Social Security number (SSN) in the “Select Member” field and click **Search**.



If your search returns multiple members, select the correct one from the list provided.

3. When the retiree's insurance coverage page is displayed, you will see their current and past coverage selections for the current year. At the bottom of the page you will also see the "Event Selection" drop down list.

This screen defaults to show only the current year plans, but this can be changed by selecting "All" from the "Coverage From" drop down list.

Criteria

Employment Information: 9005-GOTHAM PUBLIC SCHOOLS/9005 HC - 2017-07-01 to open

Coverage From: 2017

Medical

Enrollment Option	Start Date	Stop Date	Premium
HARVARD PILGRIM HEALTH / HARVARD-PILGRIM HMO (HPH) / Individual / Retired	07/01/2017		\$210.00
Enrollee			
APPLETON, AMY	Member		

Second Medical

Enrollment Option	Start Date	Stop Date	Premium
MEDEX HEALTH / MEDEX (MX) / Senior (S) / Retired	07/01/2017		\$100.00
Enrollee			
APPLETON, AMY	Member		

Vision

Enrollment Option	Start Date	Stop Date	Premium
EyeMed Vision / EyeMed Vision Plan / Individual / Retired	07/01/2017		\$12.00
Enrollee			
APPLETON, AMY	Member		

Dental

Enrollment Option	Start Date	Stop Date	Premium
ALTUS DENTAL / ALTUS DENTAL (ALT) / Individual / Retired	07/01/2017		\$30.00
Enrollee			
APPLETON, AMY	Member		

Basic Life

Enrollment Option	Start Date	Stop Date	Premium
BASIC LIFE / BASIC LIFE (2000) / Individual / Retired	07/01/2017		\$2.25
Enrollee			
APPLETON, AMY	Member		

4. Select “Cancel Enrollment” from the “Event Selection” drop down list and click **Process**.

Event Selection: Cancel Enrollment [v] Process Deny

Activity Date: [SELECT AN EVENT BELOW]

- Cancel Enrollment
- Change Enrollment
- Correct Enrollment
- Initial Enrollment

5. On the “Introduction” tab, the “Event Date” field will pre-populate with today’s date. Click **Next** to proceed to Step 2.

Event Details

Event Date: 06/21/2017

Previous Next Cancel

6. On the “Select Options” tab, click **Next**.

Previous Next Cancel

7. On the “Select Covered Persons” tab, enter the appropriate “Stop Date” on the coverage that is ending. This should be the last day of the coverage month. (e.g., if you want to end coverage for the Sept 1 premium, the stop date should be August 31).

Second Medical

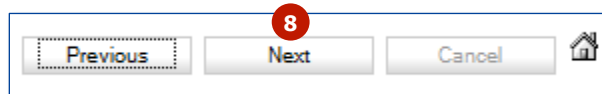
Enrollment Option	Start Date	Stop Date	Add / Delete
MEDEX HEALTH / MEDEX (MX) / Senior (S) / Retired	07/01/2017	08/31/2017	X

Enrollee

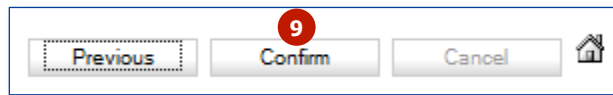
APPLETON, AMY Member

- If the “Stop Date” you enter is in the past, MyTRS will automatically process a refund of deductions that will be processed on the next warrant.
- If you delete the row entirely (by clicking the red X under the “Add/Delete” column, ALL of the deductions the retiree has paid will be refunded on the next warrant.

8. Click **Next**.



9. On the “Confirm Selection” tab, click **Confirm**.



10. On the “Confirmation” tab, click the Home icon () in the bottom left corner to complete the process.

Medical

Enrollment Option	Start Date	Stop Date	Premium
MEDEX HEALTH / MEDEX (MX) / Senior (S) / Retired	07/01/2017	08/31/2017	\$100.00
Enrollee			
APPLETON, AMY	Member		

10 