Retiree Insurance in MyTRS

MTRS Employer Training Guide



SPRING 2024



Welcome!

This guide is a comprehensive walkthrough of retiree insurance deduction processing in MyTRS as allowed under M.G.L. Chapter 32 and M.G.L. Chapter 32B.

Samples of real reporting scenarios, which employers encounter while maintaining insurance information in MyTRS, are used in this guide. If you have a reporting need or situation not captured in this manual, please contact our insurance coordinator at insuranceupdates@trb.state.ma.us.

To access instructions specifically related to reporting active employee information, see our *Deduction Reporting in MyTRS* guide.

The MyTRS application will receive periodic updates; some will be noticeable, while others will be database-related and not visible to users. As MyTRS evolves to improve the user experience and remain compliant with technology and data security standards, we will announce future functional changes to employers and update our guides online.

Visit our website at mass.gov/mtrs

The Employer section of our website offers in-depth information on all aspects of the MTRS, including:

- Employer procedures and resources (member eligibility, regular compensation, etc.)
- Current guides and training videos for MyTRS
- Forms (retirement and refund applications, payment submittal forms, etc.)

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Retiree Insurance in MyTRS

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Chapter 1—Log in / Navigation / Employer Information

Log in to MyTRS

- 1. Go to www.mass.gov/mtrs.
- 2. Click Employers.



3. Click MyTRS Employer sign in.



4. Enter username (not case-sensitive) and password (case-sensitive).

2

5. Two factor authentication (TFA) will require you to receive a security code to login. Select your preferred delivery method (if multiple options exist for your account) and click **Next**.

Two Factor Authentication			
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	Choose Delivery Method	Enter Vetification Code	
Please select a delivery method to receive a verific	tation code		
Delivery Method			
Email - By*******@Schools.Aviary.ma.us			
O Text-(***)-***-1212			
Voice - (***)-***-1212			
O Text-(***)-***-6869			
0.000			

6. MyTRS will send a message as shown.

March 8, 2024
Dear Wadger Byrd,
Your requested MyTRS verification code is: 168495
The verification code will expire in 15 minutes.
This email is system-generated, please do not reply directly.
If you did not request a verification code for MyTRS, contact us by phone at 617-679-6877.

7. Enter the verification code you received and click **Confirm**.

MgRS	
Two Factor Authentication	
Choose Delivior Mathed	2 Extra Verification Code
A verification code has been sent to the selected delivery method which will be valid for 15 minutes. Please enter the code below.	LINE TRUITING CONF
Verfication code 168	7
Resend Code	
Cancel	Previous Confirm

If you are copying and pasting the code from the email you received, double click on the code to highlight it before copying it (if you manually highlight it, an extra space will be included with the code when you paste it in MyTRS and will prevent you from logging in).

8. Once the correct code is entered, the TFA login is complete, and the Home page displays. Note: For more information or support on Two-Factor Authentication (TFA), please see the Employers online training and guides page of our website.

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Home Employer Information	I would like to	News
 Payroll Calendar Import History 	Generate Retiree Earnings Limit Calculator > Retiree Earnings Limit Calculator	ACCESS: > 01/02/2024 2-3 consecutive business days each month, employers and members lose MyTRS access so we can process benefits.
Deduction Reports \$ EFT & Payments	Import a Deduction Report File > Import and process a Deduction Report File	Periodically, on Friday evenings at 6pm, we takedown MyTRS without notice, please plan accordingly.
Employee Roster	Register an Employee > Register an employee with your organization	ERROR reporting. Use this form to report any MyTRS technical issues you may experience. > 03/09/2023 ESS error reporting - MTRS (state.ma.us)
Selections Insurance Deduction History	\$ Make a Payment > Make a one time payment	
Insurance Rates Employer Reports	Eview Retiree Insurance Selections > Review individual retiree insurance selections	
	Run a Report > Run Retiree Insurance Deduction History, Pending Enrollment Report, etc.	
	MTRS.Website > Site Pol	licy > Contact Us > © Vitech Systems Sub LLC 2021. All rights reserved.

Home Page Navigation

1. *Left navigation menu*—This menu has links that take you to the main pages. From these links you can access additional related links.

	I would like to	News
Employer Information		
Payroll Calendar	Generate Retiree Earnings Limit Calculator > Retiree Earnings Limit Calculator	ACCESS: > 01/02/2/
Import History		2-3 consecutive business days each month, employers and members lose MyTRS access so we can process benefits.
Deduction Reports	Import a Deduction Report File > Import and process a Deduction Report File	Periodically, on Friday evenings at 6pm, we takedown MyTRS without notice, please plan accordingly.
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surance Rates	View Datizea Insurance Calactions	
ployer Reports	Review individual retiree insurance selections	
	Run a Report >	
	Run Retiree Insurance Deduction History, Pending Enrollment Report, etc.	
1		

- a. This menu can be minimized by clicking the **<** at the bottom of the menu.
- b. To expand the menu again, click > at the bottom of the menu.

I woul	ld like to	News	
*	Generate Retiree Earnings Limit Calculator > Retiree Earnings Limit Calculator Import a Deduction Report File >	ACCESS: > 2-3 consecutive business days each month, employers and members lose MyTRS access so we can process benefits. Periodically, on Friday evenings at 6pm, we takedown MyTRS without notice, please plan accordingly.	01/02
	Import and process a Deduction Report File Register an Employee > Register an employee with your organization	ERROR reporting: Use this form to report any MyTRS technical issues you may experience. > ESS error reporting - MTRS (state.ma.us)	03/09
\$	Make a Payment > Make a one time payment		
iii	View Retiree Insurance Selections > Review induidual retiree insurance selections		
	Run a Report > Run Retiree Insurance Deduction History, Pending Enrollment Report, etc.		
0	MTRS Website > Site Pol	Contact Us > © Vitech Systems Sub LLC 2021. All right	its reserved.

2. *I would like to...* menu—This quick links menu takes you to some of the most frequently accessed pages within MyTRS.

woul	d like to	News			
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\$	Make a Payment > Make a one time payment				
=	View Retiree Insurance Selections > Review individual retiree insurance selections				
1	Run a Report > Run Retiree Insurance Deduction History, Pending Enrollment Report, etc.				

3. *News* section—In this section, you will find updates and news about system down time on warrant days. Be sure to check this section when you login to stay informed of any relevant announcements.



4. *Bottom Navigation*—The links at the bottom of the page take you to various pages on the main MTRS website.



5. *Header Navigation*—The header shows your Contact Name, links to your MyTRS account settings and the logout button.

5	MyTRS	1	
news	About	S Account Settings	
ACCESS: > 2-3 consecutive business days each month, employers and members lose MyTRS acce Periodically, on Friday evenings at 6pm, we takedown MyTRS without notice, please pla	ess so we can process bene an accordingly.	01/02/: efits.	2024
ERROR reporting: Use this form to report any MyTRS technical issues you may experient ESS error reporting - MTRS (state.ma.us)	ence. >	03/09/:	2023

a. *MyTRS Account Settings*—This is where you reset your password, security questions and email.



Employer Information

The Employer Information page displays:

- 1. Employer code and name
- 2. Address
- 3. Phone number
- 4. Email address
- 5. MTRS Representative assigned to your employer
- 6. Contacts for your district

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Home Employer Information	Employer Info					
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Deduction Reports	Address Information			Contact Info		
EFT & Payments Employee Roster Retiree Insurance Selections	Permanent 123 High Cliff Rd. HYDE PARK, MA 02136			Work Phone (Primary) US # (999) 999-9999 No Email Address on file		
Insurance Deduction History Insurance Rates	Additional Information					
Employer Reports	SiC Number	GIC Participant	Website Address	MTRS Representative Robert George	Convespondence By	
	Contacts					T Filters
	Name		Contact Role			
	Byrd. Wadger >		Retiree Insurance Coordina	ator		
	UTBC Makeika X	Site Delay		Contract to A	© Vitech Systems Sub LLC 2021, All rights reser	ved.
	MIRS website >	Site Policy	2/	GONTACLUS >		200211

This data is for informational purposes only and can only be changed by an MTRS representative. Contact your Employer Services Representative if any of this information needs to be updated.

Chapter 2—Retiree Insurance Guidelines

What to know BEFORE making changes to retiree insurance coverage.

Insurance coverage for retired MTRS members is not provided by the MTRS. Most school districts offer continued insurance coverage to their retirees or their survivors, and by request, the MTRS deducts the monthly premiums from the retiree's retirement allowance. The premiums are forwarded to the retiree's former district monthly.

Note: The IRS requires retirees' insurance premiums to be withheld on an after-tax basis.

Guidelines

1. Access to insurance changes via MyTRS is only available for districts not enrolled in the GIC-RMT direct billing program.

The MTRS does not maintain an insurance profile with individualized plans and rates for districts enrolled in the GIC direct billing program; we receive a file from the GIC indicating the monthly deduction amount.

- 2. Employers have access to add, change, and cancel individual coverage for retirees and survivors as well as add new rate periods for insurance plans associated with their employer. Only the MTRS can add a new plan to an employer. To request a new plan, please contact the MTRS at insuranceupdates@trb.state.ma.us if you need a new insurance plan added to your employer.
- 3. Employers can terminate a plan by adding a stop date. It is VERY important to note that any member currently having deductions on that plan will have their deductions stopped with the same end date. Please make sure to always keep a plan open for at least one retiree payroll during which you expect no retirees to be on the plan so you can be sure no retirees will have deductions removed in error and fall off your radar.
- 4. Each month there is a cut-off date, generally mid-month, in which MyTRS access is blocked as we run the monthly warrants. Entries made after that date will be processed on the following retiree payroll and will not be reflected until the retiree's following check. The date of the retiree payroll is announced each month under *News* on the *Home* page.
- 5. Insurance deductions are taken one month in advance for retirees.

E.g., **January 1** insurance premiums are deducted from the retiree's **December 31** pension payment, May 1 insurance premiums are deducted from the retiree's April 30 pension payment, etc. All entries in MyTRS are based on the coverage period, not when they will be or were deducted.

6. New retirees can be setup for insurance deductions as soon as the MTRS has received and logged their retirement application.

You will be able to enter an *Initial Enrollment* for a new retiree; however, the system will not allow you to make any changes after completing the initial enrollment until the member's retirement application has been finalized.

If you need to add initial coverage for a member that retired prior to 06/30/2016 or you find that we have accidentally not set up a retiree, please email insuranceupdates@trb.state.ma.us to request that we enable the retiree's insurance account with the subject "**Enable Retiree**."

7. How to handle health insurance deductions for employees who are retiring at the end of the school year:

Is your school district one of the districts that participate in the Group Insurance Commission's RMT program? If:

YES, then you should withhold premiums for any partial month and two full months following the employee's retirement date, because the GIC begins coverage on the first day of the third full month of retirement. For example, if the employee is retiring on 6/30/13, then you should withhold premiums through August 30, 2013. The employee would then stay with your district's group insurance program for July and August, and the GIC will pick up coverage as of September 1st. Likewise, if the employee is retiring on 7/15/13, then you should withhold premiums through September 30, 2013; in this case, the employee would stay with your district's group insurance program through July, August and September, and the GIC will pick up coverage as of October 1st.

NO, then you should treat the employee as if he or she would be returning to school the next year, and withhold his or her premiums as you would normally do from the employee's (school) year-end payday or summer pays, so that his or her insurance is paid up through the month of September. Then, in September, the insurance coordinator for your city/town/regional district can instruct us to begin insurance premium withholdings for the new retiree's October premium; the retiree's October insurance premium will be withheld from the retiree's MTRS retirement payment that is processed at the end of September.

- 8. All coverage changes are made on a full-month basis. Partial adjustments are not available to employers. If you:
 - a. Enter a **start date** other than the first day of the month; MyTRS will require you to fix the coverage effective date.
 - b. Enter a **stop date** other than the last day of the month; MyTRS will require you to enter a proper stop date. When entering a cancel function, MyTRS will require the coverage end date on the first step.
- 9. Adding both individual retiree insurance periods or a new price period for the rate of a plan itself requires that a row be added to the table with the start effective date and price.

10. If you enter new or changed deductions with a backdated effective coverage date, MyTRS will calculate an adjustment bill or refund called a "rebill" based on the entered plan rate and effective date.

If you manually billed or refunded your retiree directly, adjust your effective date accordingly to prevent the system from creating the automatic adjustment.

11. When entering deductions with retroactive effective dates, check your retiree's calculated adjustment refund or bill immediately under Insurance Deduction History to verify that the "rebill" amount matches your calculation.

Rebills are designed to calculate the difference between what the retiree's deductions were and what the deductions should have been. You will only see a rebill for months that have already been deducted; the current month's bill will not appear until our retiree payroll has been processed.

Rebills are reviewed daily by the MTRS and you may be contacted regarding any questionable rebill adjustments.

If you make a valid retroactive insurance change that generates a rebill of \$500 or more, you are required to email insuranceupdates@trb.state.ma.us notifying us of the adjustment; otherwise the rebill may be voided by the MTRS.

If you delete a plan coverage row, MyTRS will automatically create a rebill to refund all the historical payments associated to the date range pertaining to the coverage row deleted.

Only delete a plan coverage row if you need to:

- a. Replace the existing row with a different plan with the same start date, or
- b. Remove the coverage for a deduction added in error.
- 12. When making a change to an account for a member with more than one medical plan, please pay special attention to which section you are updating to avoid accidentally changing the wrong plan (Med 1, Med 2 or Med 3).
- 13. In the event a retiree or their spouse dies, please end their coverage accordingly as of the last day of the month in which the party died.

Please notify insuranceupdates@trb.state.ma.us with the date of death, when possible, and we will do the same.

- 14. If the deceased has a survivor who receives a survivor benefit, or their own MTRS benefit, deductions for that survivor must be setup to be withdrawn from the survivor's benefit as an Initial enrollment as the deceased's benefit will be stopped.
- 15. The order of deductions from a retiree's check do not relate to a retiree or their spouse/ dependents.
- 16. The MTRS reserves the right to change or cancel any deduction.

Chapter 3—Processing Individual Retiree Insurance

Processing Individual Deductions

MyTRS provides towns direct access to setup, change, correct or cancel deductions if they provide insurance for their retirees. Deductions are processed monthly as part of our retiree payroll. Retiree insurance coverage changes can be entered in real time, proactively or retroactively as needed.

Processing Options

- 1. *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).
- 2. *Change enrollment*—Allows a user to switch health plans, add additional coverage or delete current options.
- 3. *Correct enrollment*—Allows a user to correct only enrollment effective dates when no other changes are needed.
- 4. *Cancel enrollment* Allows a user to stop participation in a plan in cases where a replacement option is not selected.

Insurance Deduction Categories

- 1. *Medical*—This is the retiree's primary medical insurance deduction.
- 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 requiring a second deduction. There is no significance to the order in which deductions are listed.
- 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 coverage 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 insuranceupdates@trb.state.ma.us 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.

Chapter 4—Initial Enrollments

Note: When adding coverage to a new retiree that is not yet in pay status, an alert message will be displayed stating that the deduction amount is greater than 50% of the retiree's benefit (their benefit is \$0 until they enter pay status). This is only allowable when setting up Initial coverage. Changed or corrected enrollments over 50% of the retiree's benefit will be blocked.

Initial Enrollment

To set up insurance deductions for the first time for a retiree or survivor, use the following steps.

1. Click **Retiree Insurance Selections from** the *Left navigation* menu on the *Home* page.

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Home Employer Information	I would like to	News
Payroll Calendar Import History	Generate Retirece Earnings Limit Calculator > Retirec Earnings Limit Calculator Import a Deduction Report File >	ACCESS: > 01/02/202 2-3 consecutive business days each month, employers and members lose MyTRS access so we can process benefits. Periodically, on Friday evenings at 6pm, we takedown MyTRS without notice, please plan accordingly.
EFT & Payments Employee Roster		ERROR reporting: Use this form to report any MyTRS technical issues you may experience. > 03/09/202 ESS error reporting - MTRS (state.ma.us)
Retiree Insurance Selections Insurance Deduction History	Make a Payment > Make a one time payment	
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	Bun a Report > Pun Retiree Insurance Deduction History, Pending Enrollment Report, etc.	
	MTRS Website > Site Poli	cv > Contact Us > © Vitech Systems Sub LLC 2021. All rights reserved.

2. Click Add / Change Coverage.

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 Home Employer Information 	Member Insurance Maintenance	Add	/Change Coverage	Laport
Payroll Calendar				
1 Import History	Member Name of Solv.		2	
Deduction Reports FFT & Payments				
Employee Roster				
Retiree Insurance Selections				
History				
Employer Reports				

3. Enter the retiree's name (last, first), MTRS member number or Social Security number (SSN) in the search field and press **Enter** on your keyboard or the search button. In this example, we're using the fictional name: Deb Dove.

aving Cito	🔄 9007 - AVIARY PUBI	Retiree Enrollment				×	Welcome Wadger With Account Berlings
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Employer Information	Member Insu	0	0	0	0	0	Add/Change Coverage
Payroll Calendar		Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm	
mport History							
Deduction Reports		Please select the member that this	enrollment is for				
		Q Dove Deh	2			Search Search	
Employee Roster.		Member Name	3	SSN	Member Number	Status	
Retiree Insurance.		ALBATROSSES, AMY		XXX-XX-4579	192667	Retired	
Insurance Deduction		O ANHINGA, ALICE		XXX-XX-2138	951700	Active	
] Insurance Rates		O BLACKBIRD, BARBARA		XXX-XX-5174	144655	Retired	
Employer Reports		O BLUE JAY, BONNIE		XXX-XX-2844	211699	Retired	
		O BUDGERIGAR, HELEN		XXX-XX-3714	136979	Deceased	
		O BULFINCH, BETTY		XXX-XX-8133	959349	Active	
		O CASSAWARIES, CHRIS		XXX-XX-5932	126245	Retired	
		O CUCKOOS, DIANE		XXX-XX-4886	343773	Retired	
		O DOVE, DEB E		XXX-XX-7668	956333	Inactive	
		O FALCON, FRANK		XXX-XX-4464	247600	Retired	
		O GOLDFINCH, JENNA		XXX-XX-8744	78314	Deceased	
		0 00000 0400		XXX-XX-6807	188940	Deceased	

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

4. Select the radio button next to the correct member then click Next.

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A Home		Retiree Enrollment					×	
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Your retiree will appear as "Inactive" until they are officially in pay status. If you are able to add coverage to a retiree while they are Inactive, the MTRS has enabled that possibility because we determined the member will qualify for a benefit and so you can add their coverage early and hopefully the first time you attempt to do so.

5. Click Initial Enrollment.

MARS	3 9007 - AVIARY PUBLIC SC	Retiree Enrollment					×	Welcome Wadger wa D WyTe3 Account Britings Logical
Home Employer Information Payroll Calendar	Member Insurance	Select Member	2 Select Event	Select Coverages	Coverage Details	Review & Confirm		Add/Change Coverage
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		Coveringe Start Date"					× 🖬	
sen in	MTRS Website	Cancel				Previous	Next	Systems Sub LLC 2021. All hights reserved.

The following fields will appear:

Event Date—Pre-filled with today's date.

Coverage Start Date—Pre-filled with today's date but MUST be changed to the correct start date of the coverage.

This date MUST be changed the correct start date, the first day of the month for Initial, Change and Correct coverage or the last day of the month for Cancelling coverage. Failure to enter a correct date or an attempt to use a date prior to your retiree's retirement date, will result in the following error.

Retiree Enrollment				×	<
Error					
Invalid Coverage Start Date.					
Ø	2	3		5	
Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm	

a. Once the date is fixed, click **Next**.

	INITIAL ENROLLMENT	
Event Details		
Event Date* 03/08/2024		
Coverage Start Date* 01/01/2024 a		а
Cancel		Previous Next

The coverage start date cannot precede your retiree's first coverage eligibility date which is the first day, of the first month, after the date of retirement.

6. Select the radio button next to the correct plan under each section on the *Select Coverages* page. To add additional coverage, you will need to scroll down to the other deduction coverage sections to make your selection. Then click **Next**.

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1 Home		Retiree Enrollment				×	
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Employer Reports		O BLUE CROSS BLUE SHIELD	HMD BLUE (HB)		Survivor	\$0.01	
		O BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE	SHIELD (BC)	Family	\$944.38	
		O BLUE CROSS BLUE SHIELD	HMO BLUE (HB)		Family	\$886.33	
		BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE	SHIELD (BC)	individual	\$406.36	
		O BLUE CROSS BLUE SHIELD	HMO BLUE (HB)		Individual	\$330.74	
		O MEDEX HEALTH	MEDEX (MX)		Senior	\$197.63	
		O MEDEX HEALTH	TWO MEDEX'S (MX)	0	Senior	\$395.24	
		Second Medical					
		Insurance Carrier	Insurance Plan	Plan Coverage		Premium	
		MEDEX HEALTH	MEDEX (MX)	Senior		\$197.63	
		Basic Life					
		Insurance Carrier	Insurance Plan	Plan Cove	rage	Premium	
		BASIC LIFE	BASIC LIFE (2000)	individual		\$2,49	
		Dental					
	MTRS Webster 2	Cancel				Previous	6 Angles reserved

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.

If you accidentally select an option under one of the categories and the retiree does not actually have that type of coverage at all, you will need to click **Previous** to clear the selection.

7. Check the *Coverage Start Date* for each type of coverage on the *Coverage Details* page. Make changes as needed, then click **Next**.

		Retiree Enr	rollment					×		
	Member Insurance Mai		0	0	0	0	0		Add/Change Covera	en la
			Select Member	Select Event 1	Select Coverages	Coverage Details	Review & Confirm			
		Mentacharia Doub Date E		50x 2000/00/2668	Maridar Number		ett Mal Frederaut			
		DOM, DRUE			930333	7	ina prozen			
		Please choo	be the appropriate start and	d stop dates for your enrollment selections						
ner instance		Madical					_			
urance Deduction tory		Actions	New or Existing?	Carrier / Plan / Coverage Option		Coverage Start Date	Coverage Stop Date			
			New Coverage	BUIK CROSS BUIK SHRUD/BUIK CROSS - BUIK SHRUD (BC)/IVA	Netal	01/01/2024				
		Second Med	tral.					- 10		
		Actions	New or Existing?	Carrier / Plan / Coverage Option		Coverage Start Date	Coverage Stop Date			
			New Coverage	MEDEX HEALTH/MEDEX (MX)/Serror	2	01/01/2024				
		Basic Life								
		Actions	New or Existing?	Carrier / Plan / Coverage Option		Coverage Start Date	Coverage Stop Date	_		
			New Coverage	BASIC LIFE/BASIC LIFE (2003)/https://tail	6	01/01/2024				
								_		
	MIRS Website >	Cancel					Previous	Next Bystems Su	o LLC 2021. All rights reserved.	
	-	-		-11. 22						

Note: It is especially important to select all options for Initial Coverage in one sitting as MyTRS will prevent you from changing these selections after leaving the wizard if your retiree isn't in pay status yet.

Retroactive changes will require you to confirm Yes on this menu to trigger a retroactive calculation.

Carrier / Plan / Coverage Option	Coverage Start Date
BLUE CROSS BLUE SHIELD/BLUE CROSS - BLUE SHIELD (BC)/Individual	01/01/2024
Carrier / Plan / Cov MEDEX HEALTH/MEDEX You have selected an effective date that current month. Please verify. You have selected an effective date that current month. Please verify. Yes No	art Date Co
Carrier / Plan / Coverage Option	Coverage Start Date Co
BASIC LIFE/BASIC LIFE (2000)/Individual	01/01/2024

8. Click **Confirm** once you have verified the coverage chosen is correct.



Note: When adding coverage to a new retiree that is not yet in pay status, an alert message will be displayed stating that the deduction amount is greater than 50% of the retiree's benefit (their benefit is \$0 until they enter pay status). This is only allowable when setting up Initial coverage. Changed or corrected enrollments over 50% of the retiree's benefit will be blocked. To proceed with the coverage added, please click yes.

9. MyTRS will confirm a rebill has been generated when adding retroactive coverage. You are responsible for checking that rebill to make sure it calculates accurately. See Chapter 10 for those instructions.

1 9007 - AVIARY PUBLIC SCHOOLS	9 • Rebills generated ×
Member Insurance Maintenance	
	Q Member Number, Name or SSN

It is imperative that you go to the *Insurance Deduction History* screen in MyTRS to make sure the rebill calculated is the amount you expect to be calculated based on the coverage effective periods.

INS	1 9007 - AVIARY PUBLIC	SCHOOLS				Welcome Wadger	Will 🔁
•	Insurance Deduction H	listory / Insurance Transaction	s				
over Information	no a coo			10			
ll Calendar	Employee/Member			A	AA*AA*7000		
ory Reports	Insurance Transa	actions					Export Filters
	Trans # 1	Transaction Date	Activity Date	Trans Type	Identifier	Status	Balance
	191222310 >	03/11/2024	01/01/2024	Premium Rebill	Rebill for 01/01/2024 - 01/01/2024	Closed	\$0.00
	191207313 >	03/08/2024	01/01/2024	Premium Rebill	Adj. Bill for 01/01/2024 - 03/31/2024	Open	\$1,819.44
rts							

Chapter 5—Change Enrollments

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

1. Click **Retiree Insurance Selections** from the *Left navigation* menu on the *Home* page.

MyTRS	1 9007 - AVIARY PUBLIC SCHOOLS	Welcome Wadger Ws 🕄 MyTRI Account Sattings Lagout
Home Employer Information	I would like to	News
 Payroll Calendar Import History 	Generate Retiree Earnings Limit Calculator > Retiree Earnings Limit Calculator	ACCESS: > 01/02/2024 2-3 consecutive business days each month, employers and members lose MyTRS access so we can process benefits.
 Deduction Reports \$ EFT & Payments 	Import and process a Deduction Report File Register an Employee >	Periodically, on Friday evenings at 6pm, we takedown MyTRS without notice, please plan accordingly. ERROR reporting: Use this form to report any MyTRS technical issues you may experience, > 03/09/2023
Employee Roster Retiree Insurance Selections Insurance Deduction	Register an employee with your organization Make a Payment > Make a one time payment	ESS error reporting - MTRS (state ma us)
Insurance Rates Employer Reports	I View. Retiree. Insurance. Selections > Beview individual retiree insurance selections	
	Run a Report > Run Retiree Insurance Deduction History, Pending Enrollment Report, etc.	
ĸ	S MTRS Website > Site Pol	Icy > Contact Us > © Vitech Systems Sub LLC 2021. All rights reserved.

2. Enter the retiree's name (last, first), MTRS member number or Social Security number (SSN) in the search field and press **Enter** on your keyboard or click **Search** to review what plan(s) your retiree has before making a change.

Mg RS	9007 - AVIARY PUBLIC SCHOOLS			Welcome Wadger m 🗃
A Home	Marrie as ferrances Maintenance			
Employer Information	Member insurance Maintenance			Addi Change Coverage
Payroll Calendar		2		
1 Import History		Q Blackbird, Barbara	Search Search	
Deduction Reports				
\$ EFT & Payments				
Limployee Roster				
Selections				
Insurance Deduction History				
Insurance Rates				
Employer Reports				
	MIRS Webaite >	Site Policy >	Contact Us >	© Vitech Systems Sub LLC 2021. All rights reserved.

3. Please review your retiree's current insurance coverages before making any changes.

Click A	dd / Cł	1ange (Coverage.
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yroll Calendar Se port History SSN	Search: Blackbird, Barbara							3 Add/Change Coverage	Equal Filters
port History SSN		0							
	N	Member Number	Member Name	Coverage Type	Insurance Plan	Plan Coverage	Start Date	Stop Date 2.1	Premium Amount
XXX	(X-XX-5174 >	144655	Blackbird, Barbara	Basic Life	BASIC LIFE (2000)	Individual	07/01/2023		\$2.49
XXX	<u>x-xx-5174</u> >	144655	Blackbird, Barbara	Medical	HMO BLUE (HB)	Individual	07/01/2023		\$330.7
T & Payments XXX	X-XX-5174 >	144655	Blackbird, Barbara	Dental	NOT APPLICABLE (NA)	Individual	07/01/2022		\$47.8
nployee Roster XXX	X-XX-5174 >	144655	Blackbird, Barbara	Medical	HMO BLUE (HB)	Individual	07/01/2022	06/30/2023	\$310.5
tree insurance XXX	X-XX-5174 >	144655	Blackberd, Barbara	Medical	HMÓ BLUE (HB)	Individual	07/01/2020	06/30/2022	\$287.6
surance Deduction XXX	X-XX-5174 >	144655	Blackbird, Barbara	Medical	HMO BLUE (HB)	Individual	07/01/2019	06/30/2020	\$280.3
story XXX	0(-XX-5174 >	144055	Blackbird, Barbara	Dental	NOT APPLICABLE (NA)	Individual	07/01/2019	06/30/2022	\$47.8
surance Rates XXX	X-XX-5124 >	144655	Blackbird, Barbara	Medical	HMO BLUE (HB)	Individual	07/01/2017	06/30/2019	\$301.4
nployer Reports XXX	<u>X:XX-5174</u> >	144655	Blackbird, Barbara	Dental	NOT APPLICABLE (NA)	Individual	04/01/2017	06/30/2019	\$49.0
XXX	X-XX-5174 >	144655	Blackbird, Barbara	Medical	HMO BLUE (HB)	Individual	07/01/2016	06/30/2017	\$289.8
XXX	X-XX-5174 >	144655	Blackbird, Barbara	Medical	HMO BLUE (HB)	Individual	07/01/2015	06/30/2016	\$265.5
XXX	06-XX-5174 >	144655	Blackbird, Barbara	Medical	HMO BLUE (HB)	Individual	07/01/2014	06/30/2015	\$239.4
XXX	X-XX-5174 >	144655	Blackbird, Barbara	Medical	HMO BLUE (HB)	Individual	07/01/2013	06/80/2014	\$227.1
XXX	06-KX-5174 >	144655	Blackbird, Barbara	Dental	NOT APPLICABLE (NA)	Individual	04/01/2013	03/31/2017	\$47.5
XXX	<u>x-xx-5174</u> >	144655	Blackbird, Barbara	Basic Life	BASIC LIFE (2000)	Individual	10/01/2003	06/90/2023	\$2.11

4. Again, enter the retiree's name (last, first), MTRS member number or Social Security number (SSN) in the search field and press **Enter** on your keyboard or click **Search**.

MARS							Welcome Windger	an 🗃 🗃
 Home Employer information 	Member Insurance Mai	Retiree Enrollment	0	0	0	^ 	- Add/Change Covers	ge <u>é T</u>
Payroll Calendar	Search Daublert Bachers (7)	Select Member	Select Event '	Select Coverages	Coverage Details	Review & Conferre		
Annual Materia	SSN						Stop Date	Premium Amount
2 mpartningy	XXX-XX-5174 >							32,49
Deduction Reports	XXX-XX-5174 >	Please select the member that this enrollm	ent is for					\$330.74
	XXX XX 5174 >	Q 144655	1			Search Search		\$47.83
	XXX-XX-5174 >	Member Name		SSN	Member Number	Status	08/30/2023	- \$210.52
Referent imparatore	XXXXXX:\$174 >	O ALBATROSSES, AMY		XXX-XX-4579	192667	Retired	96/30/2022	\$287.87
O Insurance Deduction	XXX:XX:5174 >	O ANHINGA, ALICE		XXX-XX-2138	951700	Active	06/30/2020	\$280.33
Fulloy	XXX-XX-5174 >	O BLACKBIRD, BARBARA		XXX-XX-5174	144655	Retired	05/30/2922	\$47.83
	XXXXXXXXXXXX	O BLUE JAY, BONNIE		XXX-XX-2844	211699	Retired	06/20/2019	\$301.43
Employer Reports	XXXXX2174 >	O BUDGERIGAR, HELEN		XXX-XX-3714	136979	Deceased	06/30/2019	549.00
	XXXXXX5174 3	O BULFINCH, BETTY		XXX-XX-8133	959349	Active	06/30/2017	0100.04
	XXX-XX-5174 >	O CASSAWARIES, CHRIS		XXX-XX-5932	120245	Retired	06/30/2015	5239.42
	XXX-XX-5174 >	O CUCKOOS, DIANE		XXX-XX-4886	343773	Retired	06/30/2014	1227.10
	XXX-XX-5174 >	O DOVE DEB E		XXX-XX-7658	956333	Inactive	03/31/2017	\$47.57
	XXX XX 3174 >	O FALCON, FRANK		XXX-XX-4464	247600	Retired	06/30/2023	62.15
		GOLDFINCH JENNA		XXX-XX-8744	78314	Deceased		
		O GREBE GABE		XXX-XX-6807	188940	Deceased		
		O HORNRILL NORMA		XXX-XX-7155	307763	Peticed		
		ARIBU JANET		XXX.XX.3981	243520	Active		
				XXX-XX-4016	116721	Detred		
				NNN NN 4610	114171	1.000		
		O HAVE AND ADDRE			117002	Putre		
		O MALLAND MANK		AAA-XX-0561	111092	Hetred		
		Panel		¥¥¥.¥¥.1817	330239	Definer	stems hab CLC 2011 All dollar	àt :
	MIRS.Webaite >	Cancel				- Server	and the second second second	

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

5. Select the radio button next to the correct member then click Next.

MTRS	D 9007 - AVIARY PUBLIC SCHOOL						Welcome Wadger	and E
A Nome		Retiree Enrollment				<u>^</u>		
	Member Insurance Mai	0	0	0	0	0	Add/Change Cov	ner 🛓 T
Payroll Calendar	Bearth: Bandes, Batters ()	Select Member	Delect Event	delect Crovelages	Coverage Details	Review & Confirm		
1 Import History	SSN						Stop Date	Premium Amount
Deduction Reports	XXX:XX:5124 >	Please select the member that this enrollment is f						\$2.49
· Fill & Descenter	XXX XX 3174 >		10					\$350.74
	XXX XX-5174 >	Q 144655				Search Search		\$47.83
State Comployee Ruster	XXX XX 5274 >	Member Name		SSN	Member Number	Status	06/30/2023	\$310.52
Selections	XXXXXX.5174 >	BLACKBIRD, BARBARA		XXX-XX-5174	144655	Retired	06/30/2022	8287 AT
Insurance Deduction	XXX:XX:5174 >						05/30/2020	\$290.33
(D) insurance dates	XXEXX6124 >						06/30/2022	647.63
	XXX-XX-5174 >						04/36/2010	\$301.43
Employer Reports	XXX-XX-S1Z4 >						06/30/2019	549.00
	XXX-XX-53.74 >						06/30(2017	\$289.84
	XXX-XX-5174 >						05/30/2018	\$265.51
	XXX:XX:5124 >						06/30/2015	\$239.42
	XXX-XX-5174 >						06/30/2014	(\$227.79)
	XXX-XX-5174 >						03/33/2017	- 947.57
	<u>XXX-XX-5174</u> >						//06/30/2023	62.15
						5		
	S MTRD Webane >	Cancel				Next	eterns Sub LLC 2021. All rights rese	rved.

6. Click Change Enrollment.

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💏 Home		Retiree Enrollment					*	
Employer Information	Member Insurance Mai	0	0	0	0	0		Add/Change Coverage & T tool they
E Payroll Calendar	Search Bander, Batan ()	Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm.		
1 Import History	SSN	Mangae Name	104	lunde:	Let		Stop Date	Premium Amount
Deduction Reports	XXX-XX-5174 >	Blackbed, Barbara	3006-306-5174	6	Change E	hroliment	1000	12,41
CET & Invenente	XXX-XX-5174 >							\$330.74
	2005-02-5174 >		0.470 (0.044) (0.44					547.83
A Employee Ruster	3004-304-5174 >	Please select the event that is triggenin	g this enrollment.				04/30/2023	\$310.52
Selections	XXX XX 5174 >						06/30/2022	\$287.A7
Insurance Deduction	XXX-XX-2174 >	100000000			2000		04/20/2020	\$290.73
D Insurance Rates	1000-000-5174 >	CANCEL EN	IOLLMENT	CHANGE ENROLLMENT	CORREC	TENROLLMENT	106/20/2022	947,03
200	MANAGINA >				0		105/80/2019	630142
E controler reports -	INFRESHA >						CON 3472010	540.00
	AAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA						0.000-0012017	9289.64 Page 51
	AAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA			INITIAL ENROLLMENT			06-30-2016	(3269.01) (2000.05)
	ANALALIA A						04/00/2014	1997.10
	TRANSITA 2						03/91/2017	1047 NT
	XXX-XX-5174 >	Event Details					04/30/2023	4215
		Event Date* 03/08/2024						
		Coverage Start Date*						
		20/01/2024				3	× 🗔	
	MIRS.Website >	Cancel				Previous	Next stems Sub LLC 2	IO21. All Hghts heverved
\$			11					

The following fields will appear:

Event Date—Pre-filled with today's date.

Coverage Start Date—Pre-filled with today's date but MUST be changed to the correct start date of the coverage.

This date **MUST** be changed the correct start date, the **first** day of the month for **Initial**, **Change and Correct coverage** or the **last** day of the month for **Cancelling coverage**. Failure to enter a correct date or try to use a date prior to your retiree's retirement date, will result in the following error.

Retiree Enrollment					×
Error Invalid Coverage Start Date.					
Select Member	2 Select Event	3 Select Coverages	Coverage Details	5 Review & Confirm	Î

a. Once the date is fixed, click Next.

MijTRS	E 9007 - AVIARY PUBLIC SCHOOL	Retiree Enrollment					Welcome Wadge	ang
n Home		Retrice Environment					Contraction of the	
Employer Information	Member Insurance Mai	0	0	0	0	0	Add/Change	Coverage Loost Viters
Payroll Calendar	Search Bacter, Batan ()	Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm.		
	SSN	Namine Nama	139	Nerdal Nurder	Der		Stop Date	Premium Amount
Deduction Reports	XXX-XX-5174 >	Blackbed, Barbara	3006-0065174	144655	Change Er	nrolment.		\$2,49
S EFTAParmenta	XXX-XX-5174 >							\$330.74
	XXX-XX-5174 >	Disase salest the event that is trinne	ion this annothment					547.83
Comployee History	100.00.000	Prime service one error true to oppo-	ing one content.				04/30/2023	5110.52
Selections	TAXABLE 7						104/30/2024	10000
Insurance beduction History	174-14-5174 >	CANCEL E	NROLLMENT	CHANGE ENROLLMENT	CORREC	T ENROLLMENT	00/20/2022	447.83
	333-32-5174 >				-		K06/30/2019	6301 #3
Employer Reports	XXX-XX-5174 >				0		04/30/2010	649.00
	XXX-XX-5174 >						06/30/2917	0209.84
	XXX.XX.5124. >			INITIAL ENROLLMENT			06/30/2016	\$265.51
	XXX-XX-2174 >						06/30/2015	\$239.42
	XXX:XX:5174 >						06/20/2014	8227.19
	XXX.XX.5174 >	Event Details					03/31/2017	0.047.57/
	<u>XXX-XX-5174</u> >	Linu betana					06/30/2023	\$2.15
		Transf Patient						
		03/08/2024				30	2	
		Coverage Dart Date*						
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						2		
						C		
						_		
	MIRS Website 3	Cancel				Previous	atems Sub LLC 2021. All right	heserved.
			10 U.					

7. Select the radio button next to the NEW plan under each section on the Select Coverages page.

MITRS	1 9907 - AVIARY PUBLIC SCHOOL	Retiree Enrollment				×	Welcome Wa	diget MyTHE Amount Serings Lagran
Employer information	Member Insurance Mai	0	٥	0	0	0	Add/Cha	nge Coverage 👲 🍸 hereit maa
Phytoli Calendar	Search Backted Bacture (2)	Select Member	Select Event	Select Coverages	Coverage Details	Review & Conferm		
± import History	SSN	Mangar Nama	10H	Member Norther	Loss		Stop Date	Premium Amount
Deduction Reports	XXX-XX-5174 >	Blackbird, Barbara	XXX-XX-5174	144655	Change Enrol	Iment		\$2.49
S ITTA Parments	XXX:XX:5174 >							5330.74
	XXX-XX-5174 >							\$47.83
A Employee Realer	XXXXXXXXIZ4 >	Belect the Plan and Plan Coverage from t	the options below.				DP/30/2023	
Selections	XXXXXX5124 >	Medical					04/30/2022	- 5287,47
O History	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Insurance Carrier	Insurance Pl	n	Plan Coverage	Premium	06/30/2020	647.83
(1) Insurance Rates	XXX-XX-5174 3	O BLUE CROSS BLUE SHIELD	BLUE CROSS	- BLUE SHIELD (BC)	Survivor	\$17.50	06/30/2019	1007.42
Employer Reports	XXX-XX-5174 >	O BLUE CROSS BLUE SHIELD	HMO BLUE ((8)	Survivor	\$0.01	DR/30/2019	540.00
	XXX-XX-5174 >	O BLUE CROSS BLUE SHIELD	BLUE CROSS	BLUE SHIELD (BC)	Family	\$944.38	06/30/2017	5280.84
	XXX-XX-5174 >	O BLUE CROSS BLUE SHIELD	HMO BLUE ((B)	Family	\$886.33	06/30/2016	\$265.51
	XXX-XX-5174 >	O BLUE CROSS BLUE SHIELD	BLUE CROSS	BLUE SHIELD (BC)	Individual	\$406.36	06/30/2015	\$239.42
	*****	BLUE CROSS BLUE SHIELD	HMÓ BLUE ()	(8)	Individual	\$330.74	D&/30/2014	8727.19
	XXXXXX	O MEDEX HEALTH	MEDEX (MX)		Senior	\$197.63	05/33/2017	\$47.57
	XXX-XX-5124 >		Two MEDEX	C /M/V/21	Sabor	0005.74	06/30/2023	\$2.15
			1110 112023	2 (mot)	Sector -	997.04T		
		Second Medical	200000.200			1020-0000		
		Insurance Carrier	Insurance Plan		fan Coverage	Premium		
		O MEDEX HEALTH	MEDEX (MX)		enior	\$197.63		
		Basic Life						
		Insurance Carrier	Insurance Plan		Plan Coverage	Premium		
		BASIC LIFE	BASIC LIFE (2000)		Individual	\$2.49		
		Dental						
		Created				Driving	eterna Sub LC 2021 All	antis reserved
	MINS Website >	Carcer				Previous		

In this instance the retiree's First Medical is changing from HMO Blue (HB) to Blue Cross Blue Shield (BC). The system will automatically stop the HMO Blue (HB) coverage when the Blue Cross Blue Shield (BC) plan is selected.

	1952 VA 35 1984							1000000 0000 0000 0000 0000
	Member Insurance Mai	0	0	0	0	0	1 (I)	Add/Change Coverage Prest
	Search Backers Batters (3)	Select Member	Select Event	Select Coverages	Coverage Details	Raview & Cottern		
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	R004.804.5124 >	Blackbird, Barbara	3006-304-5174	144655	Change Enroll	Inient		
	<u>xxx.xx.5174</u> >							12
	XXX-XX-2174 >							
loyes Roster	XXX-XX-5174 >	Select the Plan and Plan Coverage from th	e options below.				06/20/2023	44
ctione	XXX XX 5174 >	Madeul					- DW20/2022	42
urance Deduction	XXXXXXXXXXX	Insurance Carrier	Insurance P	fan	Plan Coverage	Pren	108/30/2020	
	AAAAAAAAAAAA	O BLUE CROSS BLUE SHIELD	BLUE CROS	S - BLUE SHIELD (BC)	Survivor	\$1	7.50	5
iover Reports	XXXXX5174 >	O BLUE CROSS BLUE SHIELD	HM0 BLUE	(HB)	Survivor	5	0.01 06/20/2010	
	XXX-XX-5174 >	O BLUE CROSS BLUE SHIELD	BLUE CROS	S - BLUE SHIELD (BC)	Family	\$94	4.35 06/30/2017	-
	XXXXXXXXXXXX	O BLUE CROSS BLUE SHIELD	HMO BLUE	(H8)	Family	588	6.33 05/30/2016	. 82
	XXX XX: 9	BLUE CROSS BLUE SHIELD	BLUE CROS	S - BLUE SHIELD (BC)	individual	540	6.36 09/90/2019	
	303-3343	O BLUE CROSS BLUE SHIELD	HMO BLUE	(H6)	Individual	\$33	0.74 08/90/2014	(da
	<u>XXX-XX-5174</u> >		METER /M	6	Easting	210	03/31/2017) 6
	<u>XXX-XX-5174</u> >		TWO MEDE		Senior	\$30	06/95/2023	
		O material	The state	(mn+)	See 1			
		Second Medical	in the second		No. Commen			
		MEDEX MEALTH	MEDEX (MY)		Saning	514	7.63	
		0 medermeden	HEDEN (HA)					
		Basic Life					0	
		Insurance Carrier	Insurance Plan		Plan Coverage	Pre	•	
		BASIC LIFE	BASIC LIFE (2000	2)	Individual			
		Dental					▼.	
	CONTRACTOR AND							

8. With the new plan selected, click **Next**.

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.

If you accidentally select an option under one of the categories and the retiree does not actually have that type of coverage at all, you will need to click Previous to clear the selection. 9. Check the *Coverage Start Date* for the new plan selected on the *Coverage Details* page.

The *Coverage Start Date* is the first day of the coverage month. So, if the coverage starts in February, the *Coverage Start Date* should be "02/01/2024."

Do not delete rows of old coverage. If you delete older coverage by clicking the Delete link next to the plan, the retiree will automatically be refunded any deductions taken for the time period associated to that row.

Verify your changes, then click Next.

Marrs	1 9007 - AVIARY PUBLIC SCHOOL									w		and And the Association of States of	
ft Home		Retiree Enr	oliment						3	× _			
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	ACCESSION OF THE OWNER OF THE OWNER		•	S		0		0					
E Payroll Calendar	Search: Bachtert, Bathers ()		Select Member	Select Event	Select Coverages	Coverage Detail	5	. Revew & Co	(culture)	-			
Import History	SSN	Martin fare Dischool Do	itinia (330	Mathia Suttier 144655		Event	Evenilment		Stop Date		Premium Am	ount
Deduction Reports	XXXXXX5174 >							a subscription of the subs					2.49
S EFT & Paymenta	<u>5332333174</u> >											333	0.74
** - Employed Doubler	AXX XX-2174 7	Dieses choose	the supporting start and	ston datas for your assolimant calactions						Charles and the second		94	7.81
Referentingenore	ALALALALA J	Prease critovi	se me appropriate soli i and	stop ones to you enounen seccoms						Concern Prints			2.94
Selections	AAAAAAAAAA	Medical								24/20/2022			0.02
O History	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Actions	New or Existing?	Carrier / Plan / Coverage Option		Coverage Star	Date	Coverage Stop	Date	06/30/2022		7962 54	7.83
CO_Insurance Rates	XXX XX 5174 >		New Coverage	NUE CROSSINUE DHELD/BLUE CROSS - NUE D	HELD (BC) (Individual)	02/01/2024				06/30/2010		430	1.45
M Employer Reports	XXX.XX.5174 >	Delete	Existing Coverage	BLUE CROSE BLUE SHELD/HARD BLUE (HE)/Hab	ital	02.03 (2022	-	01/01/2024	~	(06/30)2039		54	0.00
	<u>XXX-XX-5174</u> >	Leneve				0710172023	- 09	01/01/2024		/06/30/2017		(abv	9.64
	<u>XXX.XX.5174</u> >	Delete	Even of Coverage	BUILDING BUILDING BUILDINGS	chur .	07/01/2022		06/30/2023		06/30/2016		524	6.51
	<u>XXX-XX-5174</u> >	Delete	Existing Coverage	BLUE CROSS BLUE SHELD HWO BLUE (HEV/HD)	dul -	07/01/2020		06/30/2022		06/30/2015		827	9.42
	XXX-XX-5174 >		Existing Coverage	BLUE CROSS BLUE SHELD/HAV BLUE (HES/HAV	idual.		12		-	66/30/2034		117	7.19
	XXX.XX.3174 >	Delete				07/01/2019		06/30/2020		83/31/2917		54	2.57
	XX2.XX.5174 >	Delete	Extering Coverage	BLUE CROSS BLUE SHELD/HARD BLUE (HE)/HAR	idual .	07/01/2017	٦	06/30/2019		96/30/2023		4	2.15.
		Delete	Existing Coverage	BLUE CROSS BLUE SHELD/HAD BLUE (HE)/HAD	ritual	07/01/2016		06/30/2017					
		Delete	Existing Coverage	BLUE CROSS BLUE SHELD HAVO BLUE (HB) WAY	rduel	07/01/2015		06/30/2016					
		Delete	Existing Coverage	BLUE CROSS BLUE SHELD HAVO BLUE (HE) WAV	rduif	07/01/2014		06/30/2015		_			
		Delete	Existing Coverage	BLUE CROSS BLUE SHELD, HARO BLUE (HE), HAR	idual .	07/01/2013	۵	06/30/2014	_ 9				
		Basic Life											
		Actions	New or Existing?	Carrier / Plan / Coverage Op	tion	Coverage Start Date		Coverage Stop Date					
		1	e e .	A						Anna Partie	and all limits over		
	MIRS Website >	Cancel							Previous Net	anning 300 LLC	and the signed lines		
										and the second se			

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



- b. If the dates are correct, click Yes.
- c. If the dates are incorrect or you are not sure, click No.
 - **Fix** the dates if needed and then click Next.
 - Click **Yes** when the above message is displayed again.

10. On the *Review & Confirm* page, ensure everything is correct.

The new monthly premium total is shown under New Cost. The former monthly premium total is shown under Previous Cost.

- 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 a start date, click **Previous** at the bottom of the page and go back and make edits. Clicking **Cancel** will close the wizard and discard the selections you made using the wizard.

MARS		Retires Enrollment	-					~	Welcome Wadger	with Education Conference Conference
n Home		Rearee Enrollment						<u>.</u>		
Employer information	Member Insurance Mai		9	0	0	0	0		Add/Change Cover	ADP Land Views
Payroll Calendar	Bearth Banban, Bathers @	Select	Member Se	lect Event Select	Coverages Co	verage Details	Review & Con	irm		
Import History	SSN								Stop Date	Premium Amount
Philipping Departure	XXX-XX-5174 >	Please review and cor	firm the Enrollment details.							52.49
Construction Reports	XXX.XX.3174 >	10			10					\$350.74
\$ EFTA Payments	XXX XX 5174 >	10	100		10	Part.				\$47.83
25 Employee Rester	XXX XX 5174 >	thera	XXX XXX	8174	24	Changel	Ererplimært		06/30/2023	\$310.52
Retires Insurance	XXX:XX:5174 >	Pren sinto							04/30/2022	8287.87
nurarice Deduction	XXX-XX-5174 >	New Cost			Previous Cost				ceerko/3020	\$280.33
History	XXX:XX:4124 >	Standard Member P	remium		Standard Member Premium				04/30/2022	647.83
D Insurance Rates	XXX-XX-5174 >	\$436.68			\$381.06				04/30/2018	\$201.43
Employer Reports	XXX-XX-5174 >	Enrolled Plans							.04/30/2010	549.00
	XXX-10X-5174 > 7	Common Trees	hanness Carden	And a second	New Comments	Churd Durks	Chur Dute	Owner	06/30/2017	\$289.84
	XXX-XX-5174 >	Coverage type	insurance camer	Insurance Han	Pian Coverage	Start Date	Stop Date	Pressum do.40	06/30/2016	\$265.51
	XXX-XX-5174 >	Dasic Life	BADIO LIFE BADIO LIFE	BADIC LIFE (2000)	individual	10/01/2023	04/00/2022	54.49	05/20/2015	\$239.42
	XXX-XX-5174 >	Madical		BILLE COOCE, BUILE SWIELD	PC) industrial	03/01/2003	00,00,0000	0.000	06/30/2214	6227.19
	<u>XXX-XX-5174</u> >	Medical	BILLE OBORG BILLE SHIELD	HIM BILLE (HB)	poy individual	02/01/2024	01/01/2024	000.00	03/31/2017	847.57
	<u>XXX-XX-5174</u> >	Medical	BULE CROSS BULE SHIELD	HMO BUIE (HB)	Individual	07/01/2023	06/30/2023	6310.63	06/90/2023	02.15
		Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Indextual	07/01/2020	06/30/2022	\$287.87		
		Medical	BLUE CROSS BLUE SHIELD	HMO BULE (HB)	Individual	07/01/2019	06/30/2020	\$280.33		
		Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2017	06/30/2019	\$301.43		
		Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2016	06/30/2017	\$289.84		
		Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2015	06/30/2016	10		
		Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2014	06/30/2015	-10		
		Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2013	06/30/2014	522		
		Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	07/01/2022		\$47.5		
1	S MIRS Websing >	Cancel					Pre	Confirm	otemis Bub LLC 2021. All lights rener	ved.

c. When making pro-active changes to take effect on a future date, the following message will be displayed.



d. When making retro-active changes to take effect on a past date, the following message will be displayed.



It is imperative that you go to the Insurance Deduction History screen in MyTRS to make sure the rebill calculated is the amount you expect to be calculated based on the coverage effective periods.

RS I	9007 - AVIARY PUBLI	C SCHOOLS				Welcome Wadger	WB MyTRS Account Setting	• L
	Insurance Deduction	History / Insurance Transacti	lons					
Information	-							
alendar	Blackbird, Barbara			XXX-XX	5174			
story								
n Reports	Insurance Trans	actions					Export	
yments	Trans # 1	Transaction Date	Activity Date	Trans Type	Identifier	Status	Bala	ce
Roster	191207316 >	03/08/2024	02/01/2024	Premium Rebill	Rebill for 02/01/2024 - 03/31/2024	Open	3	15
surance s	191069170 >	02/15/2024	02/15/2024	Disbursement Deduction				ŝ
leduction	191069169 >	02/15/2024	02/15/2024	Disbursement Deduction	Disb Request	Closed		S
	<u>191069168</u> >	02/15/2024	02/15/2024	Disbursement Deduction	Disb Request	Closed		S
	<u>190996764</u> >	02/15/2024	03/01/2024	Premium Bill	EBILL for 03/01/2024 - 03/31/2024	Closed		Ş
rts	185256206 >	01/22/2024	01/22/2024	Disbursement Deduction	Disb Request	Closed		100
	185256205 >	01/22/2024	01/22/2024	Disbursement Deduction	Disb Request	Closed		10
	<u>185256204</u> >	01/22/2024	01/22/2024	Disbursement Deduction	Disb Request	Closed		\$
	<u>185120589</u> >	01/22/2024	02/01/2024	Premium Bill	EBILL for 02/01/2024 - 02/29/2024	Closed		ŝ
	<u>179419487</u> >	12/19/2023	12/19/2023	Disbursement Deduction	Disb Request	Closed		S
	179419486 >	12/19/2023	12/19/2023	Disbursement Deduction	Disb Request	Closed		\$
	179419485 >	12/19/2023	12/19/2023	Disbursement Deduction	Disb Request	Closed		9
	179266481 >	12/19/2023	01/01/2024	Premium Bill	EBILL for 01/01/2024 - 01/31/2024	Closed		ŝ
	174018718 >	11/16/2023	11/16/2023	Disbursement Deduction	Disb Request	Closed		ŝ
	<u>174018717</u> >	11/16/2023	11/16/2023	Disbursement Deduction	Disb Request	Closed		s
	1 - 15 of 508					I< < Page 1	of 34 >	>

Chapter 6—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 replace the existing row by deleting the old row during the change process.

1. Click Retiree Insurance Selections from the Left navigation menu on the Home page.

MJTRS .] 9007 - AVIARY PUBLIC SCHOOLS	Welcome Wadger ws 🕞 Myrtil Account Suttings Logical			
Home Employer Information	I would like to	News			
 Payroll Calendar Import History Deduction Reports 	Generate Retiree Earnings Limit Calculator > Retiree Earnings Limit Calculator Import a Deduction Report File > Import an process a Peduction Report File	ACCESS: > 01/02/2024 2-3 consecutive business days each month, employers and members lose MyTRS access so we can process benefits. Periodically, on Friday evenings at 6pm, we takedown MyTRS without notice, please plan accordingly.			
 EFT & Payments Employee Roster Retiree Insurance Selections 	Register an Employee > Register an employee with your organization	ERROR reporting. Use this form to report any MyTRS technical issues you may experience. > 03/0 ESS error reporting - MTRS (state ma us)			
Insurance Deduction History Insurance Rates Employer Reports	Make a one time payment Image: Selection in the selection in the selection in the selection is a selection in the selection in the selection is a selection in the selection in the selection is a selection in the selection in the selection is a selection in the selection is a selection in the selection in the selection is a selection in the selection in the selection is a selection in the selection in the selection in the selection is a selection in the select				
	Run a Report > Run Retiree Insurance Deduction History, Pending Enrollment Report, etc.				
٠	Site Pole	cy > O Vitech Systems Sub LLC 2021. All rights reserved.			

2. Enter the retiree's name (last, first), MTRS member number or Social Security number (SSN) in the search field and press **Enter** on your keyboard or **Search** to review what plan(s) your retiree has before making a change.

MTRS .	3 9007 - AVIARY PUBLIC SCHOOLS	Welcome Wadger	WB MyTRS Account Settings	1 Logout
A Home ■a Employer Information	Member Insurance Maintenance		Add/Change Coverage	Export
Payroll Calendar	2 Q penguin, pani Search			
Import History Deduction Reports				
\$ EFT & Payments				
Retiree Insurance Selections				
History Insurance Rates				
III Employer Reports				

3. Please review your retiree's current insurance coverages before making any changes.

Click Add / Change Coverage.

							weicon	MyTRS Aco	unt Settings Log	out
Home	Member Insur	ance Maintenance					2	Add/Change Coverage	± 1	۲
Employer Information							5		Export Fill	tters
Payroll Calendar	Search: penguin, pa	im 💿								
Import History	SSN	Member Number	Member Name	Coverage Type	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premium Arr	nount
inport matory	<u>XXX-XX-5215</u> >	231917	Penguin, Pamela H	Medical	MEDEX (MX)	Senior	01/01/2024		\$19	97.63
eduction Reports	<u>XXX-XX-5215</u> >	231917	Penguin, Pamela H	Medical	MEDEX (MX)	Senior	01/01/2023	12/31/2023	\$18	89.96
FT & Payments	XXX-XX-5215 >	231917	Penguin, Pamela H	Dental	NOT APPLICABLE (NA)	Individual	07/01/2022		S.	47.83
molovee Roster	<u>XXX-XX-5215</u> >	231917	Penguin, Pamela H	Medical	MEDEX (MX)	Senior	01/01/2022	12/31/2022	\$15	99.96
etiree Insurance	<u>XXX-XX-5215</u> >	231917	Penguin, Pamela H	Dental	NOT APPLICABLE (NA)	Individual	07/01/2019	06/30/2022	\$4	47.83
lections	<u>xxx-xx-5215</u> >	231917	Penguin, Pamela H	Medical	MEDEX (MX)	Senior	01/01/2018	12/31/2021	\$19	97.71
surance Deduction istory	<u>XXX-XX-5215</u> >	231917	Penguin, Pamela H	Dental	NOT APPLICABLE (NA)	Individual	04/01/2017	06/30/2019	\$4	49.00
surance Rates	<u>XXX-XX-5215</u> >	231917	Penguin, Pamela H	Medical	MEDEX (MX)	Senior	01/01/2017	12/31/2017	\$19	94.94
olovor Doporte	<u>XXX-XX-5215</u> >	231917	Penguin, Pamela H	Medical	MEDEX (MX)	Senior	01/01/2016	12/31/2016	\$13	75.20
noyei neporta	<u>XXX-XX-5215</u> >	231917	Penguin, Pamela H	Medical	MEDEX (MX)	Senior	01/01/2015	12/31/2015	\$10	66.57
	XXX-XX-5215 >	231917	Penguin, Pamela H	Medical	MEDEX (MX)	Senior	07/01/2014	12/31/2014	\$16	60.70
	<u>XXX-XX-5215</u> >	231917	Penguin, Pamela H	Medical	MEDEX (MX)	Senior	07/01/2013	06/30/2014	\$23	74.80
	XXX-XX-5215 >	231917	Penguin, Pamela H	Dental	NOT APPLICABLE (NA)	Individual	04/01/2013	03/31/2017	SA	47.57

4. Again, enter the retiree's name (last, first), MTRS member number or Social Security number (SSN) in the search field and press **Enter** on your keyboard or click **Search**.

MJTRS	🖹 9007 - AVIAR					-1161	ome Wadger	an 争 xunt Bettings Lagust
A Home	Member	Retiree Enrollment				×	Add/Change Coverage	Econt Diser
Employer Information		0		0	0			
🛱 Payroll Calendar	Search: peng	Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm		
1mport History	SSN						Stop Date	Premium Amount
Deduction Reports	XXX-XX-5215	Please select the member the	at this enroliment is for				12/31/2023	\$189.96
\$ EFT & Payments	XXX-XX-5215	0.000						\$47.83
15 Employee Roster	XXX-XX-5215	C Penguin, Pam	4	001	Manshar Number	Status	12/31/2022	\$199.96
Retiree Insurance	XXX-XX-5215		,	55N	102557	Destinut	06/30/2022	\$47.83
Selections	XXX-XX-5215	O ALBATRUSSES, AMIT		XXX-XX-4579	195001	Retired	12/31/2021	\$197.71
O History	XXX-XX-5215	O ANHINGA, ALICE		XXX-XX-2138	951700	Active	06/30/2019	\$49.00
Insurance Rates	XXX-XX-5215	O BLACKBIRD, BARBAI	RA	XXX-XX-5174	144655	Retired	12/31/2017	\$194.94
Employer Departs	<u>XXX-XX-5215</u>	O BLUE JAY, BONNIE		XXX-XX-2844	211699	Retired	12/31/2016	\$175.20
III cuboya vebora	<u>XXX-XX-5215</u>	O BUDGERIGAR, HELEI	N	XXX-XX-3714	136979	Deceased	12/31/2015	\$166.57
	XXX-XX-5215	O BULFINCH, BETTY		XXX-XX-8133	959349	Active	12/31/2014	\$160.70
	XXX-XX-5215	O CASSAWARIES, CHR	15	XXX-XX-5932	126245	Retired	06/30/2014	\$274.80
	XXX-XX-5215	O CUCKOOS, DIANE		XXX-XX-4886	343773	Retired	03/31/2017	\$47.57
		O DOVE, DEB E		XXX-XX-7668	956333	Inactive		
		O FALCON, FRANK		XXX-XX-4464	247600	Retired		
		O GOLDFINCH, JENNA		XXX-XX-8744	78314	Deceased		
	S M	Cancel				Next	tech Systems Sub LLC 202	1. All rights
×						_	IVEL	

If your search returns multiple members, select the correct one from the list provided.
- MTRS 1 9007 - AVIAR **Retiree Enrollment** × ۲ Member Add/Change Cover Employer Information 0 0 0 0 0 🖻 Payroll Calendar Search: pe Select Event Select Coverages Coverage Details Review & Confirm Select Member SSN Stop Date n Amount XXX-XX-521 XXX-XX-5215 \$189.96 Please select the member that this enrollment is for XXX-XX-521 Search Q Penguin, Pam XXX-XX-521 Member Name SSN Member Numbe Status \$47.83 XXX-XX-521 06/30/2022 Selections PENGUIN, PAMELA H XXX-XX-5215 231917 0 Retired XXX-XX-521 12/31/2021 \$197.71 (1) History XXX-XX-521 06/30/2019 \$49.00 XXX-XX-521 12/31/2017 \$194.94 Insurance Rates 5 XXX-XX-521 \$175.20 Employer Reports 12/31/2014 XXX-XX-521 XXX-XX-521 \$274.80 XXX-XX-521 \$47.57 5 ch Systems Sub LLC 2021. All rights Cancel Next 0
- 5. Select the radio button next to the correct member then click Next.

6. Click Change Enrollment.



The following fields will appear:

Event Date—Pre-filled with today's date.

Coverage Start Date—Pre-filled with today's date but MUST be changed to the correct start date of the coverage.

This date **MUST** be changed the correct start date, the first day of the month for Initial, Change and Correct coverage or the last day of the month for Cancelling coverage. Failure to enter a correct date or try to use a date prior to your retiree's retirement date, will result in the following error.

Retiree Enrollment					×
 Error Invalid Coverage Start Date. 					
Ø ———	2		4	6	Í
Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm	_

7. Once the date is fixed, click **Next**.

Retire Step 2: S	e Enrollment elect Event				×
Membe Peng	er Name uin, Pamela H	SSN XXX-XX-5215	Member Number 231917	^{Event} Change Enrollment	A
Please	select the event that i	s triggering this enroll	lment.		
	CANCEL ENR	OLLMENT	CHANGE ENROLLMENT	CORRECT ENROLLMENT	
			INITIAL ENROLLMENT		
Even	t Details				
Event Da 03/12, Coverag 01/01,	te* /2024 9 Start Date* (2024			×	7
Canc	el			Previous	Next

8. Select the radio button next to the NEW plan under each section on the *Select Coverages* page. In this example, the retiree switched from Medex to Aetna.

MJRS	🗄 9007 - AVIAR					-1090	ome Wadger	wn: 🕣
😭 Home	Member I	Retiree Enrollment Step 3: Select Coverages				×	Add/Change Coverage	± ¥
Employer Information		Penguin, Parnela H	55N XXX-XX-5215	Member Number 231917	Even Change Enrollment		-	Export Filters
🖻 Payroll Calendar	Search: pen;							
🛓 Import History	SSN						Stop Date	Premium Amount
Deduction Reports	XXX-XX-5215	Select the Plan and Plan C	overage from the options be	low.				\$197.63
	XXX-XX-5215						12/31/2023	\$189.90
S EFI & Payments	XXX-XX-5215	Medical Insurance Carrier	Ine	rance Plan	Plan Coverage	Premium	12/31/2022	\$100.06
Employee Roster	XXX-XX-5215	BLUE CROSS BLU	E SHIELD BLU	E CROSS - BLUE SHIELD (BC)	Survivor	\$17.50	06/30/2022	\$47.83
Selections	XXX-XX-5215	O BLUE CROSS BUI	E SHIFLD HM	O BLUE (HB)	Survivor	\$660.00	12/31/2021	\$197.71
D Insurance Deduction History	XXX-XX-5215	O BLUE CROSS BLU	E SUIELD BILL	E CROSS - BILLE SHIELD (BC)	Family	\$0.1.00	06/30/2019	\$49.00
Insurance Rates	XXX-XX-5215		s ourses una		Family	6004.00	12/31/2017	\$194.94
THE Employer Reports	XXX-XX-5215	O BLUE CROSS BLU	E SHIELD HM	U BLUE (HB)	Family	\$880.33	12/31/2016	\$175.20
	XXX-XX-5215	O BLUE CROSS BLU	E SHIELD BLU	E CROSS - BLUE SHIELD (BC)	Individual	\$406.36	12/31/2015	\$166.57
	XXX-XX-5215	O BLUE CROSS BLU	E SHIELD HM	O BLUE (HB)	Individual	\$330.74	12/31/2014	\$160.70
	<u>XXX-XX-5215</u>	O MEDEX HEALTH	MEI	DEX (MX)	Senior	\$197.63	06/30/2014	\$274.80
	XXX-XX-5215	O MEDEX HEALTH	TW	D MEDEX'S (MX2)	Senior	\$395.24	03/31/2017	\$47.57
		O TUFTS HEALTH	TUF	TS (T)	Senior	\$97.45		19 A.
		AETNA	AET	NA MEDICARE PLAN (AMP)	Senior	\$8 <mark>8</mark>		
		Second Medical						
	0 14	Cancel				Previous Next	tech Systems Sub LLC 202	1. All rights
4							rved.	

With the new plan selected, click Next.

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.

If you accidentally select an option under one of the categories and the retiree does not actually have that type of coverage at all, you will need to click **Previous** to clear the selection.

	9007 - AVIAR	Retiree En	roliment						×	Mytits A	wa 🛃
Home	Member I									Add/Change Coverage	<u>+</u> T
Employer Information			0	⊘	0	0		6		1	Expert Fitters
Payroli Calendar	Search: pork;	s	elect Member	Select Event	Select Coverages	Coverage [Petails	Review & Col	ส์สาท		
ort History	SSN			-						Stop Date	Premium Amoun
	XXX-XX-5215	Penguin, P	amela H	XXX-XX-5215	231917		Chan	nge Enrollment			\$197.63
in Reports	XXX-XX-5215									12/31/2023	\$189.96
ayments	XXX-XX-5215										\$47.83
vee Roster	XXX-XX-5215	Please cho	ose the appropriate sta	art and stop dates for yo	our enroliment selections					12/31/2022	\$199.96
Insurance	XXX-XX-5215									06/30/2022	\$47.83
ns se Deduction	XXX-XX-5215	Medical								12/31/2021	\$197.71
	XXX-XX-5215	Actions	New or Existing?	Carrier / Plan / Cove	erage Option	Coverage Start	Date	Coverage Stop	Date	06/30/2019	\$49.00
Rates	XXX-XX-5215		New Coverage	AETNA/AETNA MEDICARE	EPLAN (AMP)/Senior	01/01/2024	i i		i i	12/31/2017	\$194.94
Reports	9	Delete	Existing Coverage	MEDEX HEALTH/MEDEX ()	MX)/Senior	01/01/2024				12/31/2016	\$175.20
	XXX-XX-5215		Existing Coverage	MEDEX HEALTH/MEDEX (MX)/Senior		-	4010410000	-	12/31/2014	\$160.37
	XXX-XX-5215	Delete				01/01/2023		12/31/2023		06/30/2014	\$274.80
	XXX-XX-5215	Delete	Existing Coverage	MEDEX HEALTH/MEDEX (MX)/Senior	01/01/2022		12/31/2022		03/31/2017	\$47.57
		Delete	Existing Coverage	MEDEX HEALTH/MEDEX (MX)/Senior	01/01/2018	Ō	12/31/2021			
		Delete	Existing Coverage	MEDEX HEALTH/MEDEX (MX)/Senior	01/01/2017	Ō	12/31/2017			
		Delete	Existing Coverage	MEDEX HEALTH/MEDEX ()	MX)/Senior	01/01/2016	m	12/31/2016	m	·•	
	M	Cancel						Previo	Next	fech Systems Sub LLC 20	21. All rights

9. Click **Delete** next to the plan you are replacing.

10. Verify the old plan row has been removed, click Next.

MJRS	1 9007 - AVIAR									Heleome W	adger	WH MyTRIS Account 5	E lettings Log	₽ jout
A Home	Member I	Retiree Er	roliment							Add	l/Change Co	verage	± .	T
Employer Information			0	0	0	0		0		Î			rport Fib	tera
🛱 Payroli Calendar	Search: penc	s	elect Member	Select Event	Select Coverages	Coverage I	Details	Review & Cor	form					
1 Import History	SSN	Mimber Nam		55N	Mambar Number		Event			5	Stop Date	P	remium Arr	nount
PT Deduction Reports	XXX-XX-5215	Penguin, P	amela H	XXX-XX-5215	231917		Chan	ge Enrollment					\$19	97.63
Deduction Reports	XXX-XX-5215										12/31/2023		\$18	89.96
\$ EFT & Payments	XXX-XX-5215										0201 (0000		S.	47.83
Employee Roster	XXX-XX-5215	Please cho	ose the appropriate st	art and stop dates for y	your enrollment selections						12/31/2022		519	47.92
Selections	XXX-XX-5215										2/31/2021		\$10	97.71
Insurance Deduction	XXX-XX-5215	Actions	New or Existing?	Carrier / Plan / Co	verage Option	Coverage Star	t Date	Coverage Stop	Date	(06/30/2019		S4	49.00
Insurance Rates	XXX-XX-5215		New Coverage	AETNA/AETNA MEDICA	RE PLAN (AMP)/Senior	01/01/2024	-		-	,	12/31/2017		\$19	94.94
	XXX-XX-5215	-				01/01/2024					2/31/2016		\$13	75.20
Employer Reports	XXX-XX-5215	Delete	Existing Coverage	MEDEX HEALTH/MEDEX	(MX)/Senior	01/01/2023	Ċ.	12/31/2023	Ċ,		2/31/2015		\$10	66.57
	<u>XXX-XX-5215</u>	Delete	Existing Coverage	MEDEX HEALTH/MEDEX	(MX)/Senior	01/01/2022	1	12/31/2022	1	1	2/31/2014		\$10	60,70
	XXX-XX-5215		Existing Coverage	MEDEX HEALTH/MEDEX	(MX)/Senior					G	06/30/2014		\$23	74.80
	XXX-XX-5215	Delete				01/01/2018		12/31/2021		6	3/31/2017		\$4	47,57
		Delete	Existing Coverage	MEDEX HEALTH/MEDEX	((MX)/Senior	01/01/2017	Ō	12/31/2017						
		Delete	Existing Coverage	MEDEX HEALTH/MEDEX	((MX)/Senior	01/01/2016	Ö	12/31/2016						
		Delete	Existing Coverage	MEDEX HEALTH/MEDEX	(MX)/Senior	01/01/2015		12/31/2015	m	-				
	© M	Cancel						Previo	Nex	tech S rved	ystems Sub	LLC 2021. A	l rights	
		-												

a. If this message is displayed due to a retroactive start date, click Yes.



11. On the *Review & Confirm* page, click **Confirm**.

MJRS	🖿 9007 - AVIAR							1994	leome Wadger	MyTHS Assessed	Diettings Logast
 Home Employer information 	Member	Retiree Enrollme	ent	•				×	Add/Change	Coverage	🛓 🍸 Deport return
Payroll Calendar	Search: peng SSN	Select Me	mber Se	elect Event Select Cov	erages Cove	rage Details	Review & Co	nfirm.	Stop Date	ci i	Premium Amount
Deduction Reports	<u>XXX-XX-5215</u> <u>XXX-XX-5215</u>	Please review and	confirm the Enrollme	nt details.					12/31/20	23	\$197.63 \$189.96
\$ EFT & Payments Employee Roster	XXX-XX-5215 XXX-XX-5215	Member Info Member Name Penguin, Pamela H	SSN XXX	-XX-5215 M	ember Number 31917	Event Chan	ge Enrollment		12/31/20	22	\$47.83
Retiree Insurance Selections	XXX-XX-5215	Premium Info New Cost			Previous Cost				12/31/20	22 21 19	\$197.71
Insurance Rates	XXX-XX-5215 XXX-XX-5215	Standard Membe \$137.82	r Premium		Standard Member Pre \$245.46	mium			12/31/20	17 16	\$194.94 \$175.20
Employer Reports	<u>XXX-XX-5215</u> XXX-XX-5215	Enrolled Plans Coverage Type	Insurance Carrier	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premium	12/31/20 12/31/20	15 14	\$166.57 \$160.70
	XXX-XX-5215 XXX-XX-5215	Medical Medical	AETNA MEDEX HEALTH	AETNA MEDICARE PLAN (AM MEDEX (MX)	P) Senior Senior	01/01/2024	12/31/2023	\$89.99 \$189.96	06/30/20	14	\$274.80 \$47.57
		Medical Medical	MEDEX HEALTH	MEDEX (MX) MEDEX (MX)	Senior Senior	01/01/2022	12/31/2022	\$199.96 \$1 1 1			
		Medical Medical	MEDEX HEALTH	MEDEX (MX) MEDEX (MX)	Senior Senior	01/01/2017	12/31/2017 12/31/2016	\$1 \$175			
¢	S M	Cancel	_			_	Previous	Confirm	tech Systems S rved	ub LLC 2021. 4	ul rights

In this example case, the change was retroactive so a rebill message will appear.

MJRS	🖹 9007 - AVIARY PU	BLIC SCHOOLS		 Rebills generated 	4 X		Welcome Wa	dger N	ve ount Settings	Ð Logout
✿ Home Employer Information	Member Insu	rance Maintenance	e				Add/	Change Coverage	Liport	T Filters
Pavroll Calendar	Search: penguin, p	am 💿								
• • • • • • • • • • • • • • • • • • • •	SSN	Member Number	Member Name	Coverage Type	Insurance Plan	Plan Coverage	Start Date	Stop Date 1	Premium	n Amount
Import History	<u>XXX-XX-5215</u> >	231917	Penguin, Pamela H	Medical	AETNA MEDICARE PLAN (AMP)	Senior	01/01/2024			\$89.99
Deduction Reports	XXX-XX-5215 >	231917	Penguin, Pamela H	Medical	MEDEX (MX)	Senior	01/01/2023	12/31/2023		\$189.96
\$ EFT & Payments	XXX-XX-5215 >	231917	Penguin, Pamela H	Dental	NOT APPLICABLE (NA)	Individual	07/01/2022			\$47.83

It is imperative that you go to the Insurance Deduction History screen in MyTRS to make sure the rebill calculated is the amount you expect to be calculated based on the coverage effective periods.

TRS	1 9007 - AVIARY PUBLI	C SCHOOLS				Welcome Wadger	WB 🔁
ie	Insurance Deduction I	History / Insurance Transa	actions				
loyer Information							
oll Calendar	Employee/Member Penguin, Pamela H			SSN XXX-XX-	5215		
rt History							
ction Reports	Insurance Trans	actions					Export Filters
Payments	Trans # 💷	Transaction Date	Activity Date = 1	Trans Type	Identifier	Status	Balance 1
oyee Roster	191232345 >	03/12/2024	01/01/2024	Premium Rebill	Rebill for 01/01/2024 - 03/31/2024	Open	(\$322.92)
e Insurance	<u>191119265</u> >	02/15/2024	02/15/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
ance Deduction	191119264 >	02/15/2024	02/15/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
ry	190996776 >	02/15/2024	03/01/2024	Premium Bill	EBILL for 03/01/2024 - 03/31/2024	Closed	\$0.00
ince Rates	185217791 >	01/22/2024	01/22/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
oyer Reports	185217790 >	01/22/2024	01/22/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
	185120601 >	01/22/2024	02/01/2024	Premium Bill	EBILL for 02/01/2024 - 02/29/2024	Closed	\$0.00
	179339911 >	12/19/2023	12/19/2023	Disbursement Deduction	Disb Request	Closed	\$0.00
	<u>179339910</u> >	12/19/2023	12/19/2023	Disbursement Deduction	Disb Request	Closed	\$0.00
	179266494 >	12/19/2023	01/01/2024	Premium Bill	EBILL for 01/01/2024 - 01/31/2024	Closed	\$0.00
	174045014 >	11/16/2023	11/16/2023	Disbursement Deduction	Disb Request	Closed	\$0.00
	<u>174045013</u> >	11/16/2023	11/16/2023	Disbursement Deduction	Disb Request	Closed	\$0.00
	173909054 >	11/16/2023	12/01/2023	Premium Bill	EBILL for 12/01/2023 - 12/31/2023	Closed	\$0.00
	168433945 >	10/19/2023	10/19/2023	Disbursement Deduction	Disb Request	Closed	\$0.00
	<u>168420417</u> >	10/19/2023	10/19/2023	Disbursement Deduction	Disb Request	Closed	\$0.00

Chapter 7—Adding Coverage with a Start Date Prior to the Most Recent Rate Start Date

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. This will require a 3-step process.

Step 1: The first line will be for the coverage for the time prior to the new rate taking effect

1. Click Retiree Insurance Selections from the functions menu.

mation I we	buld like to	News
ar 👲	Generate Retiree Earnings Limit Calculator > Retiree Earnings Limit Calculator	ACCESS: > 01/02/20
orts 1	Import a Deduction Report File > Import and process a Deduction Report File	2-3 consecutive business days each month, employers and members lose MyTRS access so we can process benefits. Periodically, on Friday evenings at 6pm, we takedown MyTRS without notice, please plan accordingly.
ts ter	Register an Employee > register an employee with your organization	ERROR reporting: Use this form to report any MyTRS technical issues you may experience, > 03/09/20 ESS error reporting - MTRS (state.ma.us)
uction \$	Make a Payment > Make a one time payment	
es ints	View Retiree Insurance Selections > Review individual retiree insurance selections	
	Run a Report > Run Retiree Insurance Deduction History, Pending Enrollment Report, etc.	

2. Enter the retiree's name (last, first), MTRS member number or Social Security number (SSN) in the search field and press **Enter** on your keyboard or click **Search** to review what plan(s) your retiree has before making a change.

MyTRS .	9007 - AVIARY PUBLIC SCHOOLS	Welcome Wadger	WB MyTRIS Account Settings	3 Logost
♠ Home ■ Employer Information	Member Insurance Maintenance	A	dd/Change Coverage	topon
 Payroll Calendar Import History 	2 Q. Peafowl, pet 🐼 Search			
Deduction Reports EFT & Payments				
Retiree Insurance				
Insurance Deduction History				
il. Employer Reports				

3. Please review your retiree's current insurance coverages before making any changes.

Click Add / Change Coverage.

MgTRS .	3 9007 - AVIARY PUBLIC S	SCHOOLS					1.1	Welcome Wadger	W8 MyTRS Account Settings) Logout
A Home ■ Employer Information	Member Insurance	e Maintenance					3	Add/Change	Coverage Łapon	T Filters
🖨 Payroll Calendar	Search: Peafowl, pet 🔘									
1 Import History	SSN	Member Number	Member Name	Coverage Type	Insurance Plan = I	Plan Coverage	Start Date	Stop Date	Premiun	n Amount
Deduction Reports	XXX-XX-2175 >	258350	Peafowl, Petunia	Second Medical	MEDEX (MX)	Senior	01/01/2024			\$197.63
	<u>XXX-XX-2175</u> >	258350	Peafowi, Petunia	Medical	HMO BLUE (HB)	Individual	07/01/2023	10.01.0000		\$330.74
\$ EFT & Payments	<u>XXX-XX-21/5</u> >	258350	Peafowi, Petunia	Second Medical	MEDEX (MX)	Senior	07/01/2023	12/31/2023		5189.96
Employee Roster	XXX-XX-2175 >	258350	Peatowi, Petunia	Medical	HMO BLUE (HB)	Family	07/01/2022	06/30/2023		5832.15
Retiree Insurance Selections	XXX-XX-21/5 >	258350	Peafowi, Petunia	Medical	HMO BLUE (HB)	ramity	07/01/2020	06/30/2022		6290.22
nsurance Deduction	XXX:XX:21/3 >	258350	Peafoud Petunia	Medical	HMO BLUE (HB)	Individual	09/01/2019	06/30/2020		9200.33
Insurance Rates Employer Reports										
K	S MTRS Websi	te >	Site Pe	olicy >	Conta	act Us >	¢V	Vitech Systems Sub Ll	.C 2021. All rights res	erved.

4. Enter the retiree's name (last, first), MTRS member number or Social Security number (SSN) in the search field and press **Enter** on your keyboard or click **Search**.

MyRS	9007 - AVIARY P	Ballan David					Helcome Wadger	wa 🛃 count Settings Logost
ft Home	Member Ins	Retiree Enrollment				^	Add/Change Coverage	<u>±</u> ¥
Employer Information		0	0	0	0	6		and a second
🖹 Payroll Calendar	Search: Peafowl	Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm	1.410.00483400	
1 Import History	SSN						Stop Date -	Premium Amount
Deduction Reports	XXX-XX-2175 X	Please select the member that thi	s enroliment is for					\$197.63
S FFT & Payments	XXX-XX-2175 >						12/31/2023	\$189.96
	XXX-XX-2175 >	Q peal 4				Search Search	06/30/2023	\$832.15
Detres formance	<u>XXX-XX-2175</u> >	Member Name		SSN	Member Number	Status	06/30/2022	\$771.45
Selections	XXX-XX-2175 >	O ALBATROSSES, AMY		XXX-XX-4579	192667	Retired	06/30/2020	\$280.33
History	<u>XXX-XX-2175</u> >	O ANHINGA, ALICE		XXX-XX-2138	951700	Active	06/30/2019	\$301.43
Insurance Rates		O BLACKBIRD, BARBARA		XXX-XX-5174	144655	Retired	l	
M Employer Reports		O BLUE JAY, BONNIE		XXX-XX-2844	211699	Retired		
		O BUDGERIGAR, HELEN		XXX-XX-3714	136979	Deceased		
		O BULFINCH, BETTY		XXX-XX-8133	959349	Active		
		O CASSAWARIES, CHRIS		XXX-XX-5932	126245	Retired		
		O CUCKOOS, DIANE		XXX-XX-4886	343773	Retired		
		O DOVE, DEB E		XXX-XX-7668	956333	Inactive		
		O FALCON, FRANK		XXX-XX-4464	247600	Retired		
		O GOLDFINCH, JENNA		XXX-XX-8744	78314	Deceased		
	O MTP	Cancel				Next	ech Systems Sub LLC 2021 /	All rights reserved
¢	G mins		_		_			

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

- MTRS 1007 - AVIARY P × Retiree Enrollment ۲ ± Member In: Add/Change Co Employer Information 0 0 0 0 0 Search: Peafo Select Event Select Me Coverage Details Review & Confirm Select Cove SSN \$197.63 XXX-XX-2175 > \$330.74 XXX-XX-2175 > Please select the member that this enrollment is for XXX-XX-2175 > \$189.96 Search Q pea XXX-XX-2175 > 06/30/2023 \$832.15 Member Name SSN Member Number Status 06/30/2022 \$771.45 Retiree Insurance 5 ۲ PEAFOWL, PETUNIA XXX-XX-2175 258350 Retired 06/30/2020 \$280.33 Insurance Deducti History 0 PUFFIN, PEARL XXX-XX-9034 908952 Active XXX-XX-2175 06/30/2019 \$301.43 Employer Reports 5 Cancel LLC 2021. All rights r 0 MTR
- 5. Select the radio button next to the correct member then click Next.

6. Click Change Enrollment.

MTRS	🗄 9007 - AVIARY P							elcome Wadger	WR MyTR5 Account	3 Settings Logout
A Home	Member Ins	Retiree Enrollment					×	Add/Change C	overage	± ▼ xoort Faturs
Employer Information	Search: Postowi	o ——		0	0	0	1			
Payroll Calendar	SSN	Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm		Stop Date	p	remium Amount
1 Import History	XXX-XX-2175 >	Member Name Peafowl, Petunia	SSN XXX-XX-2175	Member Number 258350	Even	e Enrollment				\$197.63
Deduction Reports	<u>XXX-XX-2175</u> >			6						\$330.74
\$ EFT & Payments	XXX-XX-2175 >							12/31/2023		\$189.96
2 Employee Roster	XXX-XX-2175 >	Please select the event that is to	riggering this enrollment.					06/30/2023		\$832.15
Retiree Insurance	XXX-XX-2175 >			•			- I	06/30/2022		\$771.45
9 Insurance Deduction	XXX-XX-21/5 >							06/30/2020		\$280.33
Fisiory		CANCEL ENRO	DLLMENT	CHANGE ENROLLMENT	CORRECT	FENROLLMENT				
Employer Reports					0		- 1			
				INITIAL ENROLLMENT						
		Event Details								
		Event Date*								
	MTR:	Cancel				Previous	Next	ech Systems Sub LL	C 2021. All rig	hts reserved
4										

The following fields will appear:

Event Date—Pre-filled with today's date.

Coverage Start Date—Pre-filled with today's date but MUST be changed to the correct start date of the coverage.

This date **MUST** be changed the correct start date, the first day of the month for Initial, Change and Correct coverage or the last day of the month for Cancelling coverage. Failure to enter a correct date or try to use a date prior to your retiree's retirement date, will result in the following error.

Retiree Enrollment					×
• Error					
Invalid Coverage Start Date.					
Ø	2	3	4	5	
Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm	

7. Once the date is fixed, click **Next**.

Please se	elect the event that is triggering this enrollm	ent.		
	CANCEL ENROLLMENT	CHANGE ENROLLMENT	CORRECT ENROLLMENT	
		INITIAL ENROLLMENT		
Event D	Details			
Event Date* 03/11/20	024			
Coverage St 12/01/20	tart Date* 7		×	
Cancel			Previous	Next

8. Select the plan from the available list, click **Next**.

MTRS	9007 - AVIARY P						Helcome Wadger	viti 🕣 Rā Account Bertinga — Lagovi
🛉 Hame	Member Ins	Retiree Enrollment				×	Add/Change Covera	age 🛓 🍸
Employer Information		0	0	0	0	0	Î	Esport Fatura
📋 Payroll Calendar	Search: Pealow	Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm		
1mport History	SSN UV UV DITE S	Member Name	55N	Menter Number	Even		Stop Date	Premium Amount
Deduction Reports	XXX-XX-2175 >	Peafowl, Petunia	xxx-xx-2175	258350	Change Er	nrollment		\$330.74
\$ EFT & Payments	XXX-XX-2175 >						12/31/2023	\$189.96
Employee Roster	<u>XXX-XX-2175</u> >	8 he Plan and Plan Co	verage from the options below.				06/30/2023	\$832.15
Retiree Insurance	<u>XXX-XX-2175</u> >						06/30/2022	\$771.45
Insurance Deduction	<u>XXX-XX-2175</u> >	M cal					06/30/2020	\$280.33
-S History	<u>xxx-xx-2175</u> >	Insurance Carrier	insure and a second	ance Plan	Plan Coverag	ge Premium	06/30/2019	\$301.43
s insurance kates		O BLUE CROSS BLUE	SHIELD BLUE	CRUSS - BLUE SHIELD (BC)	Family	5944.38		
Employer Reports		O BLUE CROSS BLUE	SHIELD HMO	BLUE (HB)	Family	\$886.33		
		O BLUE CROSS BLUE	SHIELD BLUE	DITIE (UP)	Individual	\$300.30	·	
		BEDE CHUSS BLUE	SHIELD HMU	DLUC (HD)	Sopier	\$330.74		
		MEDEX HEALTH	TWO	AEDEV'S (MY2)	Senior	\$370.02		
		O MEDEX REALTH	140	MEDER 5 (MIRE)	Senior	33/7.92		
		Second Medical	Incorpor	oo Blan D	lan Coverage	8		
		MEDEX HEALTH	MEDEX	(MX) S	enior	\$189.9		
							arth Currisons Cuts LLC 201	1 All sights opposid
	C MTR:	Cancel				Previous	our systems Sub LCC 202	1. No rights reserved.
	-							

9. Make sure the appropriate start date is listed in the *Coverage Start Date* field and click **Next**.

MARS	🗄 9007 - AVIARY P	Retiree En	rollment						×	Welcome	Wadger	WB Ay1769 Account Se	Engs Logout
A Home	Member Ins		0	0	0	0		0		Â	id/Change Cov	erage 4	ort Fillers
🖹 Payroll Calendar	Search: Peafowl	0	Select Member	Select Event	Select Coverages	Coverage De	etails	Review & Con	firm	Stop	Date	Pri	mium Amount
Import History	<u>XXX-XX-2175</u> >	Member Name Peafowl, P	etunia	XXX-XX-2175	Member Number 258350		Event Chang	ge Enrollment					\$197.63
Deduction Reports	XXX-XX-2175 >									12/3	1/2023		\$330.74
Employee Roster	XXX-XX-2175 >	Please cho	ose the appropriate star	t and stop dates for your e	nrollment selections					06/3	0/2023		\$832.15
Retiree Insurance	<u>XXX-XX-2175</u> >									06/3	0/2022		\$771.45
Insurance Deduction History	XXX-XX-2175 >	Medical Actions	New or Existing?	Carrier / Plan / Coverag	e Option	Coverage Star	t Date	Coverage Stop	Date	06/3	0/2020		\$280.33
Insurance Rates			New Coverage	MEDEX HEALTH/MEDEX (MX)/	senor 9	12/01/2023							
		Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HM	IO BLUE (HB)/Individual	07/01/2023	۵	11/30/2023					
		Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HM	IO BLUE (HB)/Family	07/01/2022	Ō	06/30/2023					
		Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HM	to BLUE (HB)/Family	07/01/2020	Ö	06/30/2022	Ö				
		Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HM	O BLUE (HB)/Individual	07/01/2019		06/30/2020		ť.			
		Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HM	IO BLUE (HB)/Individual	08/01/2017		06/30/2019	9				
		Second Me	dical							-			
	S MIR	Cancel						Previ	ous	ech Syst	ems Sub LLC 2	021 All righ	s reserved.
		_				_	_	_	_				

If this message is displayed due to a retroactive start date, click **Yes**.



10. On the *Review & Confirm* page, ensure everything is correct and click **Confirm**.

	Retiree Enrollmen	t					×	l ay	RB Account Settings Logout
Member	Ins							Add/Change Cover	age 👲 🔻
Information			0		0	6		1	Lopon Filtera
endar Search: Pe	fow! Select Men	ber Select Event	Select Cov	erages C	overage Details	Review & Cor	firm		
SSN								Stop Date	Premium Amount
<u>XXX-XX-217</u>	5 Please review and co	nfirm the Enrollment details.							\$197.63
ts XXX-XX-217	5 >								\$330.74
XXX-XX-217	A Member Info							12/31/2023	\$189.96
<u>XXX-XX-217</u>	> Member Name Peafowl, Petunia	SSN XXX-XX-2175	Me 25	eniber Number 18350	Even	nge Enrollment		06/30/2023	\$832.15
<u>XXX-XX-217</u>	5 >							06/30/2022	\$771,45
XXX-XX-217	5 > Premium Info							06/30/2020	\$280.33
XXX-XX-217	S > New Cost Standard Member F \$395.26	Premium		Previous Cost Standard Member Pr \$528.37	emium			06/30/2019	\$301.43
	Enrolled Plans								
	Coverage Type	Insurance Carrier	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premium		
	Second Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2024		\$197.63		
		MEDEX HEALTH	MEDEX (MX)	Senior	07/01/2023	12/31/2023	\$189.96		
	Second Medical	INCOLO INCOLINI							
	Second Medical Medical	MEDEX HEALTH	MEDEX (MX)	Senior	12/01/2023		\$197.63		
	Second Medical Medical Medical	MEDEX HEALTH BLUE CROSS BLUE SHIELD	MEDEX (MX) HMO BLUE (HB)	Senior Individual	12/01/2023 07/01/2023	11/30/2023	\$197.63 \$33 <mark>10</mark>		
	Second Medical Medical Medical Medical	MEDEX HEALTH BLUE CROSS BLUE SHIELD BLUE CROSS BLUE SHIELD	MEDEX (MX) HMO BLUE (HB) HMO BLUE (HB)	Senior Individual Family	12/01/2023 07/01/2023 07/01/2022	11/30/2023 06/30/2023	\$197.63 \$33 \$83 \$83		
	Second Medical Medical Medical Medical Medical	MEDEX HEALTH BLUE CROSS BLUE SHIELD BLUE CROSS BLUE SHIELD BLUE CROSS BLUE SHIELD	MEDEX (MX) HMO BLUE (HB) HMO BLUE (HB) HMO BLUE (HB)	Senior Individual Family Family	12/01/2023 07/01/2023 07/01/2022 07/01/2020	11/30/2023 06/30/2023 06/30/2022	\$197.63 \$33 10 \$83 \$771.		

This process will result in Rebill.



Step 2: The next step, we'll need to Cancel the coverage we just added so we can add a row for the newest rate

1. Click Add/Change Coverage.

MyTRS	9007 - AVIARY PUBL	IC SCHOOLS					Ŵ	Velcome Wadger	Vð ount Settinge Lo	egent.
A Home ■ Employer Information	Member Insura	nce Maintenance					1	Add/Change Coverage	Export p	T Fitters
Payroll Calendar	Search: Peafowl, pet	0								
	SSN	Member Number	Member Name	Coverage Type	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premium A	mount
T Import History	XXX-XX-2175 >	258350	Peafowl, Petunia	Second Medical	MEDEX (MX)	Senior	01/01/2024		St	197.63
Deduction Reports	XXX-XX-2175 >	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Individual	07/01/2023		\$3	330.74
\$ EFT & Payments	XXX-XX-2175 >	258350	Peafowl, Petunia	Second Medical	MEDEX (MX)	Senior	07/01/2023	12/31/2023	ST	189.96

2. Again, enter the retiree's name, MTRS member number or SSN and press **Enter** on your keyboard or click **Search**. In this example, we're using the fictional name: Petunia Peafowl.

MATRS	🛅 9007 • AVIARY P	Better Freellerent				v	Helcome Wadger	wa 🧿
🔒 Home	Member Ins	Retiree Enroliment				^	Add/Change Coverage	
Employer Information		0	0	0	0			
📋 Payroll Calendar	Search: Peafowl	Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm		
1 Import History	SSN						Stop Date	Premium Amount
Deduction Reports	XXX-XX-21/5 3	Please select the member that thi	s enrollment is for					\$197.63
C FFT & Payments	XXX-XX-2175 3						11/30/2023	\$330.74
y cristanina	XXX-XX-2175 >	Q peal 2				Search Search	12/31/2023	\$189.96
Employee Roster	XXX-XX-2175 >	Member Name	-	SSN	Member Number	Status	06/30/2023	\$832.15
Selections	XXX-XX-2175 >	O ALBATROSSES, AMY		XXX-XX-4579	192667	Retired	06/30/2022	\$771.45
O Insurance Deduction	<u>XXX-XX-2175</u> >	O ANHINGA, ALICE		XXX-XX-2138	951700	Active	06/30/2020	\$280.33
Insurance Rates	XXX-XX-2175 >	O BLACKBIRD, BARBARA		XXX-XX-5174	144655	Retired	06/30/2019	\$301.43
TR Employer Reports		O BLUE JAY, BONNIE		XXX-XX-2844	211699	Retired		
		O BUDGERIGAR, HELEN		XXX-XX-3714	136979	Deceased		
		O BULFINCH, BETTY		XXX-XX-8133	959349	Active		
		O CASSAWARIES, CHRIS		XXX-XX-5932	126245	Retired		
		O CUCKOOS, DIANE		XXX-XX-4886	343773	Retired		
		O DOVE, DEB E		XXX-XX-7668	956333	Inactive		
		O FALCON, FRANK		XXX-XX-4464	247600	Retired		
		O GOLDFINCH, JENNA		XXX-XX-8744	78314	Deceased		
	S MIR	Cancel				Next	ech Systems Sub LLC 2021	All rights reserved
*	-	······································						

Myrs	🖹 9007 - AVIARY P	Retiree Enrollment					×	Helcome Wadger MyTRE Are	va 🕣 nant Aetings Lagout
 Home Employer Information 	Member Ins	0	0	0	0	0		Add/Change Coverage	Liport Etters
 Payroll Calendar Import History 	Search: Peafowl	Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm		Stop Date 💷	Premium Amount
Deduction Reports	XXX-XX-2175 >	Please select the member that this	enrollment is for					11/20/2022	\$197.63 \$189.96
Ş EFT & Payments	XXX-XX-2175 >	Q pea				0	Search	12/31/2023	\$189.96
Retires Insurance	X	Member Name		SSN	Member Number	Status		06/30/2023	\$832.15
Selections	. 1	PEAFOWL, PETUNIA		XXX-XX-2175	258350	Retired		06/30/2022	\$771.45
History	<u>XXX-XX-2175</u> >	O PUFFIN, PEARL		XXX-XX-9034	908952	Active		06/30/2020	\$280.33
Insurance Rates	<u>XXX-XX-2175</u> >							06/30/2019	\$301.43
Employer Reports			2				3		
	S MIR	Cancel	_		_	_	Next	ech Systems Sub LLC 2021. Al	I rights reserved.

3. Select the radio button next to the retiree's name and then click Next.

4. Click **Cancel Enrollment** from the *Event Selection* page.

MyRS	胞 9007 - AVIARY P						~	lcome Wadger	WB MyTRS Account	D Settings Logout	
🛧 Home	Member Ins	Retiree Enrollment					×	Add/Change 0	Coverage	<u>+</u> T	
Employer Information		0	0	0	0	0				agont relate	
Payroll Calendar	Search: Peafowl	Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm					
Import History	SSN	-		Managina Managina	1000		- 1	Stop Date	F	remium Amount	
	<u>XXX-XX-2175</u> >	Peafowl, Petunia	XXX-XX-2175	258350	Cancel E	nrollment				\$197.63	
Deduction Reports	XXX-XX-2175 >									\$189.96	
\$ EFT & Payments	XXX-XX-2175 >							11/30/2023		\$330.74	
K Employee Roster	<u>XXX-XX-2175</u> >	Please select the event that is to	iggering this enrollment.					12/31/2023		\$189.96	
Retiree Insurance	XXX-XX-2175 >							06/30/2023		\$832,15	
Selections Insurance Deduction	XXX-XX-2175 >							06/30/2022		\$771.45	
	<u>XXX-XX-2175</u> >	CANCEL ENRO	LLMENT	CHANGE ENROLLMENT	CORRECT	ENROLLMENT		06/30/2020		\$260.33	
Insurance Rates	XXX-XX-21.75 >							06/30/2019		\$301,43	
🐻 Employer Reports											
		4		INITIAL ENROLLMENT							
		Event Details					ļ				
		Event Date*									
	O HITP	Cancel				Previous	Next	ch Systems Sub LL	C 2021, All ric	hts reserved.	
	WINS										

The following fields will appear:

Event Date—Pre-filled with today's date.

Coverage Start Date — This is the coverage STOP date, so it should be the last day of the coverage month. (e.g., if you want to end coverage for the September 1 premium, the Coverage Start Date should be 8/31).

This date **MUST** be changed the correct start date, the first day of the month for Initial, Change and Correct coverage or the last day of the month for Cancelling coverage. Failure to enter a correct date or try to use a date prior to your retiree's retirement date, will result in the following error.

Retiree Enrollment				×
 Error Invalid Coverage Start Date. 				
Select Member	Select Event	3	Coverage Details	Review & Confirm

5. Once the date is fixed, click Next.

Please select the event that is triggering this enrolln	nent.	
CANCEL ENROLLMENT	CHANGE ENROLLMENT	CORRECT ENROLLMENT
	INITIAL ENROLLMENT	
Event Details		
Event Date* 03/11/2024		
Coverage Start Date* 12/31/2023 5		× 1.
Cancel		Previous Next

MATRS	📘 9007 - AVIARY P	Retire	e Enrollment					×	elcome Wadger	WB MyTRS Account Setting	a Logoui
+ Homa	Member Ins					~			Add/Change	Coverage 🛔	T Filters
	Search-Destruit		0	o		0	©				
Payroll Calendar	SSN		Select Member	Select Event	Select Coverages	Coverage Details	Review & Confi	m	Stop Date	Drami	um Amount
	VXX-XX-2175 N	Membe	er Name	SSN	Member Number		Event		Stop Date	Fight	\$107.63
Deduction Reports	VVV.VV.2175 A	Peato	owl, Petunia	XXX-XX-2175	258350		Cancel Enrollment				40.0819
C EET & Drammento	XXXXX2175 3								11/30/2023		\$330.74
	XXX-XX-2175 >								12/31/2023		\$189.96
25 Employee Roster	XXX-XX-2175 X	Select	the Plan and Plan Covera	ge from the options below	λ.				06/30/2023		\$832.15
Retiree Insurance Selections	XXX-XX-2175 >								06/30/2022		\$771.45
Insurance Deduction	XXX-XX-2175 >	Medica	al Insurance Carrier	Insur	ance Plan	Plan Coverage		Premium	06/30/2020		\$280.33
History	XXX-XX-2175 >			MED	EX (MX)	Sanior		\$190.06	06/30/2019		\$301.43
		•	MEDER HEREIN	w.co	cx (mx)	Genio		\$105.50			
Employer Reports		Secon	d Medical								
			Insurance Carrier	Insur	ance Plan	Plan Coverage		Premium			
		۲	MEDEX HEALTH	MED	EX (MX)	Senior		\$189.96			
	S MIR	Cance	el				Previous	Next	ech Systems Sub U	LC 2021. All rights r	eserved.
¢	S MIR	Cance	el				Previous	Next	ech Systems Sub L	LC 2021. All rights r	eserve

6. On the *Select Coverages* page, click **Next**.

7. On the *Coverage Details* page, enter the appropriate *Coverage Stop Date* on the coverage that is ending. This should be the last day of the coverage month (e.g., the *Coverage Stop Date* is 12/31/2023). Then click **Next**.

Myrs	🛅 9007 - AVIARY P	Retiree En	rollment						×	elcome Wadger	unti yTRIS Account Settlings Lo	e an
🔒 Home	Member Ins									Add/Change Cov	erage ±	Y
Employer Information			0	0	0		0		í		Deport p	Aurs-
🖹 Payroll Calendar	Search: Pestowl	S	elect Member	Select Event	Select Coverages	Covera	ige Details	Review & Confirm				
1 Import History	SSN	Member Name		55N	Merriber Number			Event	_	Stop Date	Premium A	mount
Deduction Reports	XXX-XX-2175 >	Peafowl, Pe	tunia	XXX-XX-2175	258350			Cancel Enrollment	_		51	97.63
S FFT & Payments	XXX-XX-2175 >									11/30/2023	53	330.74
 Employee Destor 	XXX-XX-2175 >	Diana abaa	as the expression stars							12/31/2023	51	89.96
Retiree Insurance	<u>XXX-XX-2175</u> >	Please choo	se the appropriate star	t and stop dates for your e	enroliment selections			7		06/30/2023	\$8	832.15
Selections	XXX-XX-2175 >	Medical						Ú		06/30/2022	\$7	771,45
9 History	<u>XXX-XX-2175</u> >	Actions	New or Existing?	Carrier / Plan / Cove	erage Option	Coverage Star	t Date	Coverage top Date	11	06/30/2020	\$2	280.33
Insurance Rates	XXX-XX-2175 >	Delete	Existing Coverage	MEDEX HEALTH/MEDEX (MX)/Servor	12/01/2023	Ō	12/31/ <mark>2023 × 🗂</mark>		06/30/2019	\$3	01.43
Employer Reports		Delete	Existing Coverage	undefined/HMO BLUE (HB	9	07/01/2023	Ċ,	11/30/2023				
		Delete	Existing Coverage	undefined/HMO GLUE (HB)	07/01/2022		06/30/2023				
		Delete	Existing Coverage	undefined/HMO BLUE (HB	9	07/01/2020		06/30/2022				
		Delete	Existing Coverage	undefined/HMO BLUE (HB	0	07/01/2019	đ	06/30/2020				
		Delete	Existing Coverage	undefined/HMO BLUE (HB	2	08/01/2017		06/30/2019	4			
		Second Med	lical									
	S MIR	Cancel						Previous	Next	ech Systems Sub LLC 2	021. All rights reserve	ed.
	-											

8. On the *Review & Confirm* page, check everything you entered, assuming everything is correct, click **Confirm**.

MTRS	1007 - AVIARY P								Welcome Wadger	nti 🕣
🛧 Hama	Memberins	Retiree Enrollmen	t					×	Add/Change Cover	ane 👲 🍸
Employer Information		0	0	0		0	6		Î	Export Vitare
Payroll Calendar	Search: Peafowl	Select Mem	ber Select Event	Select Co	verages	Coverage Details	Review & Conf	rm		
fimport History	SSN								Stop Date	Premium Amount
	<u>XXX-XX-2175</u> >	Please review and co	nfirm the Enrollment details.							\$197.63
Deduction Reports	XXX-XX-2175 >									\$189.96
	XXX-XX-2175 >	Member Info							11/30/2023	\$330.74
📇 Employee Roster	<u>XXX-XX-2175</u> >	Peafowl, Petunia	55N XXX-XX-2175		fember Number (583:50	Can	t icel Enrollment		12/31/2023	\$189.96
Retiree Insurance	XXX-XX-2175 >								06/30/2023	\$832.15
Selections	XXX-XX-2175 >	Premium Info							06/30/2022	\$771.45
	<u>XXX-XX-2175</u> >	New Cost Standard Member F	remium		Previous Cost Standard Member F	Premilium			06/30/2020	\$280.33
Insurance Rates	XXX-XX-2175 >	\$197.63			\$387.59				06/30/2019	\$301.43
Employer Reports		Enrolled Plans								
		Coverage Type	Insurance Carrier	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premium		
		Second Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2024		\$197.63		
		Second Medical	MEDEX HEALTH	MEDEX (MX)	Senior	07/01/2023	12/31/2023	\$189.96		
		Medical	MEDEX HEALTH	MEDEX (MX)	Senior	12/01/2023	12/31/2023	\$189.96		
		Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2023	11/30/2023	\$3: 8	1	
		Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2022	06/30/2023	\$83		
		Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2020	06/30/2022	\$771.		
	S MIR	Cancel					Previous	Confirm	ech Systems Sub LLC 20	21. All rights reserved

This step will also generate a rebill.



Step 3: The second row will be for the coverage period with the current rate in effect

1. Click Add/Change Coverage.

MTRS	1 9007 - AVIARY PUBLIC	SCHOOLS						Welcome Wadger	WB MyTRS Account	Settings	E Logovi
A Home	Member Insuranc	e Maintenance					1	Add/Change	Coverage	≜ Isport	Filters
Payroll Calendar	Search: Peafowl, pet 🔘)									
	SSN	Member Number	Member Name	Coverage Type	Insurance Plan	Plan Coverage	Start Date	Stop Date	6	remium	Amount
Import History	XXX-XX-2175 >	258350	Peafowl, Petunia	Second Medical	MEDEX (MX)	Senior	01/01/2024			3	\$197.63
Deduction Reports	XXX-XX-2175 >	258350	Peafowl, Petunia	Medical	MEDEX (MX)	Senior	12/01/2023	12/31/2023		į.	\$189.96
\$ EFT & Payments	XXX-XX-2175 >	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Individual	07/01/2023	11/30/2023		8	\$330.74
Employee Roster	XXX-XX-2175 >	258350	Peafowl, Petunia	Second Medical	MEDEX (MX)	Senior	07/01/2023	12/31/2023		1	\$189.96
Retiree Insurance	<u>xxx-xx-2175</u> >	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Family	07/01/2022	06/30/2023		2	\$832.15
Selections	XXX-XX-2175 >	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Family	07/01/2020	06/30/2022		3	\$771.45
O Insurance Deduction History	XXX-XX-2175 >	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Individual	07/01/2019	06/30/2020		- ù	\$280.33
	10000000000	000000		100000		100000000				28	

2. Again, enter the retiree's name (last, first), MTRS member number or Social Security number (SSN) in the search field and press **Enter** on your keyboard or click **Search**.

Home	19007 - AVIARY P	Retire	e Enrollment					×	elcome Wadger	भव MyTRS Account Settings Lo	eogout
Employer Information Payroll Calendar Import History	Member Ins Search: Peafowt SSN XXX-XX-2175 >		0 Select Member	Ø Select Event	3 Select Coverages	Coverage Details	(S) Review & Confirm		Add/Change (Coverage Export Premium A	Amount
Deduction Reports EFT & Payments	XXX-XX-2175 > XXX-XX-2175 >	Please	select the member that this	s enrollment is for			0	Search	12/31/2023 11/30/2023	S S	189.96 \$330.74
K Employee Roster	<u>XXX-XX-2175</u> >	-	Member Name		SSN	Member Number	Status		12/31/2023	\$	189.96
Retiree Insurance	XXX-XX-2175 >	0	ALBATROSSES, AMY		XXX-XX-4579	192667	Retired		06/30/2023	SI	832,15
Insurance Deduction	<u>XXX-XX-2175</u> >	0	ANHINGA, ALICE		XXX-XX-2138	951700	Active	2.	06/30/2022	Ş. 6-	771.45
History	XXX-XX-2175 3	0	BLACKBIRD, BARBARA		XXX-XX-5174	144655	Retired		06/30/2019	s. S	\$301.43
	Contraction of the	0	BLUE JAY, BONNIE		XXX-XX-2844	211699	Retired				
Employer Reports		0	BUDGERIGAR, HELEN		XXX-XX-3714	136979	Deceased				
		0	BULFINCH, BETTY		XXX-XX-8133	959349	Active				
		0	CASSAWARIES, CHRIS		XXX-XX-5932	126245	Retired				
		0	CUCKOOS, DIANE		XXX-XX-4886	343773	Retired				
		0	DOVE, DEB E		XXX-XX-7668	956333	Inactive				
		0	FALCON, FRANK		XXX-XX-4464	247600	Retired				
		0	GOLDFINCH, JENNA		XXX-XX-8744	78314	Deceased				
	S MIR	Cance	el					Next	ech Systems Sub LL	C 2021. All rights reserv	ved.

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

3. Select the radio button next to the correct member then click Next.

Myrs	📄 9007 - AVIARY P	Patiroo Enrollmont					×	elcome Wadger	witt 📰 Account Bettings Lagout
A Home	Member Ins	Redree Enrollment						Add/Change Coverag	pe 👲 🍸
Employer Information	and the second	0	0	0	0	0			
Payroll Calendar	Search: Peatowl	Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm			
🚖 Import History	SSN XXX-XX-2175 >							Stop Date	Premium Amount \$197.63
Deduction Reports	XXX-XX-2175 >	Please select the member that thi	s enrollment is for					12/31/2023	\$189.96
\$ EFT & Payments	XXX-XX-2175 >	0				•	Count	11/30/2023	\$330.74
Employee Roster	<u>XXX-XX-2175</u> >	V pes		PON	Mambar Number	Clatus	search	12/31/2023	\$189.96
Retiree Insurance				30H	259250	Datirad	_	06/30/2023	\$832.15
Selections	3	PEAPOWE, PETONIA		AAA-AA-2173	200000	Retired		06/30/2022	\$771.45
S History	XXX-XX-2175 >	O PUFFIN, PEARL		XXX-XX-9034	908952	Active		06/30/2020	\$280.33
Insurance Rates	XXX-XX-2175 >							06/30/2019	\$301.43
Employer Reports									
							3		
	S MIR	Cancel					Next	ech Systems Sub LLC 2021	All rights reserved.
×	-		_			_			

4. Click Change Enrollment.

Home	E] 9007 - AVIARY P	Retiree Enrollment					×	Icome Wadger	Ay TIRE Accessed Settings Logost
Employer Information	Member ins	0	0	0	0	0	Î	Add/Change Cov	boot riters
📋 Payroll Calendar	Search: Pealowi	Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm		Otan Data	Dramium Amount
1 Import History	XXX-XX-2175 >	Member Name Peafowl, Petunia	SSN XXX-XX-2175	Member Number 258350	E-ent Change	e Enrollment		stop bate	\$197.63
Deduction Reports	<u>XXX-XX-2175</u> >			Δ			- 1	12/31/2023	\$189,96
\$ EFT & Payments	XXX-XX-2175 >						I	11/30/2023	\$330.74
K Employee Roster	XXX-XX-2175 >	Please select the event that is	triggering this enrollment.				I	12/31/2023	\$189.96
Retiree Insurance Selections	XXX-XX-2175 >			•			I	06/30/2023	\$532.15
Insurance Deduction	XXX-XX-2175 >	CANCEL END	OLUMENT	CHANCE ENDOLUMENT	0000503		I	06/30/2020	\$280,33
Insurance Rates	<u>XXX-XX-2175</u> >	CANCEL ENR	OLLMENT	CHANGE ENROLLMENT	CURRECT	ENROLLMENT	I	06/30/2019	\$301,43
Employer Reports				INITIAL ENROLLMENT					
		Event Details							
	S MIR	Cancel	_	_	_	Previous	Next	ech Systems Sub LLC 2	021. All rights reserved.

The following fields will appear:

Event Date—Pre-filled with today's date.

Coverage Start Date—Pre-filled with today's date but MUST be changed to the correct start date of the coverage.

This date **MUST** be changed the correct start date, the first day of the month for Initial, Change and Correct coverage or the last day of the month for Cancelling coverage. Failure to enter a correct date or try to use a date prior to your retiree's retirement date, will result in the following error.

Retiree Enrollment					×
Error					
Invalid Coverage Start Date.					
~	2	3		5	
Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm	

Once the date is fixed, click **Next**.

Retire Step 2: S	e Enrollment Jelect Event		×
Membe Peafo	r Name SSN owl, Petunia XXX-XX-21	Member Number 75 258350	^{Event} Change Enrollment
Please	select the event that is triggering this en	allment	
	CANCEL ENROLLMENT	CHANGE ENROLLMENT	CORRECT ENROLLMENT
		INITIAL ENROLLMENT	
Event	t Details		
Event Da 03/11/	^{te*} /2024		
Coverage 01/01/	e Start Date* 2024		È
Cance	el		Previous

5. Select the radio button next to the NEW plan under each section on the *Select Coverages* page.

MJRS	1 9007 - AVIARY P	Petiree Encollment				×	elcome Wadger	WEI 🕀
A Home	Member ins	Retree Enrolment					Add/Change Covera	igo 🛓 🍸
Employer Information	100000	Ø	0	0	0	- 0		
Payroll Calendar	Search: Peatowi	Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm		20000000000000
🟦 Import History	SSN XXX-XX-2175 >	Member Name Dasfoud: Datumis	55N	Member Number	Event Channa Ent	olimant	Stop Date	Premium Amount S197.63
Deduction Reports	XXX-XX-2175 >	Pearoni, Petania	AAAA2113	236330	charge ch	uniten	12/31/2023	\$189.96
\$ EFT & Payments	XXX-XX-2175 >						11/30/2023	\$330.74
#1 Employee Roster	<u>XXX-XX-2175</u> >	Select the Plan and Plan Coveran	from the ontions below				12/31/2023	\$189.96
Retiree Insurance	XXX-XX-2175 >	Sector the Field and Field Sector	nom me options below.				06/30/2023	\$832.15
Selections	XXX-XX-2175 >	Medical					06/30/2022	\$771.45
S History	<u>XXX-XX-2175</u> >	Insurance Carrier	Insura	ince Plan	Plan Coverage	e Premium	06/30/2020	\$280.33
Insurance Rates	XXX-XX-2175 >	O BLUE CROSS BLUE SHIEL	D BLUE	CROSS - BLUE SHIELD (BC)	Survivor	\$17.50	06/30/2019	\$301.43
Employer Reports		O BLUE CROSS BLUE SHIEL	D HMO	BLUE (HB)	Survivor	\$0.01		
		O BLUE CROSS BLUE SHIEL	D BLUE	CROSS - BLUE SHIELD (BC)	Family	\$944.38	·	
		O BLUE CROSS BLUE SHIEL	D HMO	BLUE (HB)	Family	\$886.33		
		O BLUE CROSS BLUE SHIEL	D BLUE	CROSS - BLUE SHIELD (BC)	Individual	\$406.36		
		O BLUE CROSS BLUE SHIEL	D HMO	BLUE (HB)	Individual	\$330.74		
	5	MEDEX HEALTH	MEDE	X (MX)	Senior	\$10 5		
		O MEDEX HEALTH	TWO	MEDEX'S (MX2)	Senior	\$3		
		Second Medical					-	
	S MIR:	Cancel				Previous Next	ech Systems Sub LLC 202	1. All rights reserved.
				_	_	,		

- 6. Click **Next** on the *Select Enrollment* page.
- 7. On the *Coverage Details* page, verify enter the appropriate Coverage Start Date for the new coverage.

In this example the Coverage Start Date is 01/01/2024 then click Next.

Myrs	🛅 9007 - AVIARY P	Retiree En	rollment							×	alcome Wadger	WII MyTRS Account Set	🕣 Inga Lugad
A Home	Member Ins										Add/Change Co	overage	T Ellers
Employer Information			0	O	Ø	0		0					
Payroll Calendar	Search: Pestowi		Select Member	Select Event	Select Coverages	Coverage De	etails	Review & Con	าร์แกรง	- 1			
1 Import History	SSN	Member Name		55N	Member Number		Event			11	Stop Date	Pre	mium Amount
Deduction Reports	XXX-XX-2179 2	Peafowl, Pi	itunia	XXX-XX-2175	258350		Chang	e Enrollment		- 1	12/21/2022		0197.00
A	XXX-XX-21/2 /									- 1	11/20/2022		\$109.90
S Er i & Payments	NNN-NY-2175 N									- 1	10/20/2020		\$190.06
K Employee Roster	XXX-XX-2175 3	Please choo	ose the appropriate star	t and stop dates for your e	enroliment selections					- 1	06/30/2023		\$832.15
Retiree Insurance Selections	XXX-XX-2175 S									- 1	06/30/2020		\$771.45
Insurance Deduction	XXX-XX-2175 >	Actions	New or Existing?	Carrier / Plan / Coverad	ne Ontion	Coverage Start	t Date	Coverage Stop	Date		06/30/2020		\$280.33
Insurance Rates	XXX-XX-2175 >		New Coverage	MEDEX HEALTH/MEDEX (MX)	/Senior	01/01/2024	-		-		06/30/2019		\$301.43
			21.153 (162/1031)54			01/01/2024	U.			-			
Employer Reports		Delete	Existing Coverage	MEDEX HEALTH/MEDEX (MX)	/Senior	12/01/2023	ī	12/31/2023					
		Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HM	NO BLUE (HB)/Individual	07/01/2023	i i	11/30/2023					
		Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HM	40 BLUE (HB)/Family	07/01/2022		06/30/2023					
		Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HN	40 BLUE (HB)/Family	07/01/2020		06/30/2022		7			
		Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HK	40 BLUE (HB)/Individual	07/01/2019		06/30/2020		1			
		Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HM	MO BLUE (HB)/Individual	08/01/2017		06/30/2019		ν.			
c	S MIR	Cancel						Previ	ious	Next	ech Systems Sub LLC	2021. All right	s reserved.

8. If this message is displayed due to a retroactive start date, click Yes.



Mycro	19007 - AVIARY P	Retiree Enrollmen						×	elcome Wadger	MyTRS Account Settings	Logod
🕈 Home	Member Ins	Rearce Enrollmen	•						Add/Change	Coverage 💻	Ŧ
Employer Information		0	0	0		0	6	1		Export	Pittara
Payroli Calendar	Search: Peafowl	Select Men	ber Select Event	Select Cov	erages (Coverage Details	Review & Co	nfirm			
Import Listory	SSN								Stop Date	Premiu	am Amount
inport matory	<u>XXX-XX-2175</u> >	Please review and co	nfirm the Enrollment details.								\$197.63
Deduction Reports	XXX-XX-2175 >								12/31/2023		\$189.96
	XXX-XX-2175 >	Member Info							11/30/2023		\$330.74
Employee Roster	<u>XXX-XX-2175</u> >	Member Name Peafowl, Petunia	88N XXX-XX-2175	54 21	ember Number 58350	Ever	nge Enrollment		12/31/2023		\$189.96
Retiree Insurance	<u>xxx-xx-2175</u> >								06/30/2023		\$832.15
Selections	XXX-XX-2175 >	Premium info							06/30/2022		\$771.45
Insurance Deduction History	<u>xxx-xx-2175</u> >	New Cost			Previous Cost				06/30/2020		\$280.33
Insurance Rates	XXX-XX-2175 >	\$395.26	remium		Standard Member Pi \$387.59	remium			06/30/2019		\$301.43
Employet Reports		Enrolled Plans									
		Coverage Type	Insurance Carrier	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premium			
		Second Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2024		\$197.63			
		Second Medical	MEDEX HEALTH	MEDEX (MX)	Senior	07/01/2023	12/31/2023	\$189.96			
		Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2024		\$197.63	J		
		Medical	MEDEX HEALTH	MEDEX (MX)	Senior	12/01/2023	12/31/2023	\$11 9			
		Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2023	11/30/2023	\$33			
		Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2022	06/30/2023	\$832			
	S MIR	Cancel					Previou	s Confirm	ech Systems Sub Li	C 2021 All rights re	served

9. On the *Review & Confirm* page, click **Confirm**.

Another Rebills generated message will appear:



Now you will see both rows added for the new plan showing both rates.

★ Home Employer Information	Member Insurance	e Maintenance						Add/Change C	overage 🛓	Faters
Payroll Calendar	Search: Peafowl, pet 🔕									
Import History	SSN	Member Number	Member Name	Coverage Type	Insurance Plan	Plan Coverage	Start Date 💷	Stop Date	Premiu	im Amour
	<u>XXX-XX-2175</u> >	258350	Peafowl, Petunia	Medical	MEDEX (MX)	Senior	01/01/2024			\$197.6
Deduction Reports	<u>XXX-XX-2175</u> >	258350	Peafowl, Petunia	Second Medical	MEDEX (MX)	Senior	01/01/2024			\$197.6
EFT & Payments	<u>XXX-XX-2175</u> >	258350	Peafowl, Petunia	Medical	MEDEX (MX)	Senior	12/01/2023	12/31/2023		\$189.9
Employee Roster	<u>XXX-XX-2175</u> >	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Individual	07/01/2023	11/30/2023		\$330.7
Retiree Insurance	<u>XXX-XX-2175</u> >	258350	Peafowl, Petunia	Second Medical	MEDEX (MX)	Senior	07/01/2023	12/31/2023		\$189.9
Selections	<u>XXX-XX-2175</u> >	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Family	07/01/2022	06/30/2023		\$832.1
History	XXX-XX-2175 >	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Family	07/01/2020	06/30/2022		\$771.4
Insurance Rates	xxx-xx-2175 >	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Individual	07/01/2019	06/30/2020		\$280.3
	XXX-XX-2175 >	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Individual	08/01/2017	06/30/2019		\$301.4

It is imperative that you go to the Insurance Deduction History screen in MyTRS to make sure the rebill calculated is the amount you expect to be calculated based on the coverage effective periods.

Chapter 8—Correct Enrollments

The Correct Enrollment function is exclusively used for start and/or stop date changes to existing coverage. Do not use this function if you also need to update a retiree's coverage options.

1. Click **Retiree Insurance Selections** from the *Left Navigation* menu on the *Home* page.

MTRS	D 9007 - AVIARY PUBLIC SCHOOLS	Welcome Wadger ws 🕞 Myntif.Acceut familya Logon
Home Employer Information	I would like to	News
 Payroll Calendar Import History 	Generate Retiree Earnings Limit Calculator > Retree Earnings Limit Calculator Import a Deduction Report File >	ACCESS: > 01/02/2024 2-3 consecutive business days each month, employers and members lose MyTRS access so we can process benefits. Beindicited to a Diction complete at from use blockform MoTDS without ratios please also accordingly.
Deduction Reports EFT & Payments	Import and process a Deduction Report File Register: an Employee >	ERROR reporting: Use this form to report any MyTRS technical issues you may experience. > 03/09/2023
Retiree Insurance Selections Insurance Deduction History	Hegister an emproyee with your organization Make a Payment > Make a one time payment	ESS error reporting - MTRS (state.ma.us)
 Insurance Rates Employer Reports 	Yiew Retiree Insurance Selections > Review individual retriev insurance selections	
	Run a Report > Run Retiree Insurance Deduction History, Pending Enrollment Report, etc.	
ĸ	S MIRS Website > Site Pol	licy > © Vitech Systems Sub LLC 2021. All rights reserved.

2. Enter the retiree's name (last, first), MTRS member number or Social Security number (SSN) in the search field and press **Enter** on your keyboard or click **Search**.

MJTRS I	9007 - AVIARY PUBLIC SCHOOLS		Welcome Wadger WB) Logout
♠ Home Employer Information	Member Insurance Maintenance		Add/Change Coverage	+ Export
 Payroll Calendar Import History 	2 9 100	re, deb		
Deduction Reports				
Employee Roster Retiree Insurance Selections Insurance Deduction				
History Insurance Rates Employer Reports				
	MIRS Website > E Site Policy >	Contact Us > © V	/itech Systems Sub LLC 2021. All rights res	served.

3. Please review your retiree's current insurance coverages before making any changes.

Click Add /Change Coverage.

My RS	3 9007 - AVLARY PUBL	IC SCHOOLS					Welco	me Wadger	WB MyTRS Account Settings) Logout
▲ Home ➡ Employer Information	Member Insura	nce Maintenance					3	Add/Change C	Coverage 🛓	Filters
🖻 Payroll Calendar	Search: Dove, deb	6								
▲ Import History	SSN	Member Number	Member Name	Coverage Type	Insurance Plan 11	Plan Coverage	Start Date	Stop Date	Premi	um Amount
Deduction Reports	XXX-XX-7668 >	956333	Dove, Deb E	Basic Life	BASIC LIFE (2000)	Individual	01/01/2024			\$2.49
	<u>XXX-XX-7668</u> >	956333	Dove, Deb E	Second Medical	MEDEX (MX)	Senior	01/01/2024			\$197.63
\$ EFT & Payments	<u>XXX-XX-7668</u> >	956333	Dove, Deb E	Medical	BLUE CROSS - BLUE SHIELD (BC)	Individual	01/01/2024			\$406.36
🚉 Employee Roster										
Retiree Insurance										
nsurance Deduction										
History										
Insurance Rates										
ile Employer Reports										
	MTRS We	bsite >		Site Policy >	G Contact Us >		© Vitech	Systems Sub LL	C 2021. All rights re	served.
4			100							
	8									

4. Again, enter the retiree's name (last, first), MTRS member number or Social Security number (SSN) in the search field and press **Enter** on your keyboard or click **Search**.

MyRS	19007 - AVLARY P						Helcome Wadger With MyTRS Account Settings Logout
🏫 Home	Member Ins	Retiree Enrollment				×	Add/Change Coverage 👲 🕇
Employer Information		0	0	0	0		Export rines
Payroll Calendar	Search: Dove, de	Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm	
🚖 Import History	SSN XXX-XX-7668 >						Stop Date Premium Amount \$2.49
Deduction Reports	XXX-XX-7668 >	Please select the member that the	is enrollment is for				\$197.63
\$ EFT & Payments	<u>XXX-XX-7668</u> >	Q. Dove, deb	4			Search	\$406.36
Employee Roster		Member Name		SSN	Member Number	Status	
Retireé Insurance Selections		O ALBATROSSES, AMY		XXX-XX-4579	192667	Retired	
S Insurance Deduction		O ANHINGA, ALICE		XXX-XX-2138	951700	Active	
Insurance Rates		O BLACKBIRD, BARBARA		XXX-XX-5174	144655	Retired	
Employer Reports		O BLUE JAY, BONNIE		XXX-XX-2844	211699	Retired	
		O BUDGERIGAR, HELEN		XXX-XX-3714	136979	Deceased	
		O BULFINCH, BETTY		XXX-XX-8133	959349	Active	
		O CASSAWARIES, CHRIS		XXX-XX-5932	126245	Retired	
		O CUCKOOS, DIANE		XXX-XX-4886	343773	Retired	
		O DOVE, DEB E		XXX-XX-7668	956333	Inactive	
		O FALCON, FRANK		XXX-XX-4464	247600	Retired	
		O GOLDFINCH, JENNA		XXX-XX-8744	78314	Deceased	
<	S MIR	Cancel				Next	ech Systems Sub LLC 2021, All rights reserved.

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

5. Click the radio button next to the member you searched for and click Next.

MATRS	🛅 9007 - AVLARY P	Retiree Enrollm	ent					×	elcome Wadger	WB	inga Logost
A Home	Member Ins								Add/Change	Coverage 🚊	et Paters
Employer Information	Search: Dove, de	Colored	Jambas	Calend Exact	Calent Courrenaur	Courses but alls	Ominu & Confer				
Import Elistem	SSN	aquect	an a	Denvi greni	perior coverages	Coverage Declara.	All and a Constant		Stop Date	Pres	mium Amoun
Deduction Property	<u>XXX-XX-7668</u> >										\$2.4
EET & Desenante	XXX-XX-7668 >	Please select the	member that this enroll	ment is for							\$197.6
, EPT & Payments	AAAAA. 1000 7	Q Dove, deb					0	Search			3400.30
Retiree Insurance		Member	Name	SSN	Me	nber Number	Status				
Selections	5	OVE, DE	B E	XXX-XX-/668	95	333	Inactive				
9 History											
Insurance Rates											
Employer Reports											
								E			
								D			
	S MIR	Cancel						Next	ech Systems Sub Li	C 2021, All rights	reserved.

6. Click Correct Enrollment.

MyRS	🛅 9007 - AVIARY P	Retiree Enrollment					×	Icome Wadger	WIL tyTRS Account Sett	nga Logovi
🏫 Hame	Member Ins							Add/Change Cov	erage 🛓	Titters
Employer Information	Search: Dove, de	Select Member	2 Select Event	3 Select Coverages	Coverage Details	(3) Review & Confirm	- 1			
1 Import History	SSN	Member Name	554	Member Number	Event		- 1	Stop Date	Prer	nium Amount
Deduction Reports	<u>XXX-XX-7668</u> > <u>XXX-XX-7668</u> >	Dove, Deb E	XXX-XX-7668	956333	Correct	t Enrollment	- 1			\$197.63
\$ EFT & Payments	XXX-XX-7668 >					0				\$406.36
Refiree Insurance		Please select the event that is t	riggering this enrollment.							
Selections Insurance Deduction History										
Insurance Rates		CANCEL ENR	DLLMENT	CHANGE ENROLLMENT	CORRECT					
Employer Reports		2								
				INITIAL ENROLLMENT			- 1			
							- 1			
		Event Details								
		Event Date*						ah Sustama Sub 1101	071 All Hobby	reperiod
×.	S MIR	Cancer	_	_	_	Previous	Next	and particular state states		

The following fields will appear:

Event Date—Pre-filled with today's date.

Coverage Start Date—Pre-filled with today's date but MUST be changed to the correct start date of the coverage.

This date **MUST** be changed the correct start date, the first day of the month for Initial, Change and Correct coverage or the last day of the month for Cancelling coverage. Failure to enter a correct date or try to use a date prior to your retiree's retirement date, will result in the following error.

Retiree Enrollment				×
Error Invalid Coverage Start Date.				
Ø	2	3	4	6
Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm

a. Once the date is fixed, click Next.

Retiree Enrollmen Step 2: Select Event	t			×
Member Name Dove, Deb E	SSN XXX-XX-7668	Member Number 956333	Event Correct Enrollment	
Please select the eve	nt that is triggering this enrollm	ent.		
CAN	ICEL ENROLLMENT	CHANGE ENROLLMENT	CORRECT ENROLLMENT	
		INITIAL ENROLLMENT		
Event Details				
Event Date* 03/11/2024 Coverage Start Date* 02/01/2024 Cancel			Previous	a
Please select the even CAN Event Details Event Date* 03/11/2024 Coverage Start Date* 02/01/2024 Cancel	INCEL ENROLLMENT	ent. CHANGE ENROLLMENT INITIAL ENROLLMENT	CORRECT ENROLLMENT	a

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My RS	1 9007 - AVIARY P								14 alc	come Wadge
🕭 Hame		Retiree	e Enrollment						×	-
Employer Information	Member Ins			-	-					Add/Cha
	Search: Dove, de		v	.		0		-0		
E Payroll Calendar	SSN		Select Member	Select Event	Select Coverages	Coverage Deta	ilis Ren	new & Confirm		Stop Da
Import History	XXX-XX-7668 >	Member Dove	r Name Deb E	SSN XXX-XX-7668	Member Number 956333		Event Correct Enrollmen	ıt		
Deduction Reports	Same and									
	XXX-XX-7668 >									
	XXX-XX-7668 > XXX-XX-7668 >								- 1	
5 EFT & Payments & Employee Roster	XXX-XX-7668 > XXX-XX-7668 >	Select 1	the Plan and Plan Coverage	from the options below.						
EFT & Payments	XXX-XX-7668 >	Select 1	the Plan and Plan Coverage	from the options below.						
EFT & Payments Employee Roster Retiree Insurance Selections	XXX-XX-7668 > XXX-XX-7668 >	Select 1 Medica	the Plan and Plan Coverage	from the options below.						
EFT & Payments Employee Roster Retired Insurance Selections Insurance Deduction History	XXX:XX:7668 >	Select 1 Medica	the Plan and Plan Coverage II Insurance Carrier	from the options below.	ance Plan	,	Plan Coverage	Pr	emium	
EFT & Payments Employee Roster Selections Insurance Ocduction History Isurance Rstes	XXX:XX:7668 >	Select 1 Medica	the Plan and Plan Coverage II Insurance Carrier BLUE CROSS BLUE SHIELD	from the options below. Insura	ance Plan CROSS - BLUE SHIELD (BC)	F	Plan Coverage ndividual	Pr	emium :406.36	
EFT & Payments EFT & Payments Employee Roster Selections Insurance Deduction History Insurance Rates Employer Reports	XXX:XX:7668 >	Select 1 Medica	the Plan and Plan Coverage Il Insurance Carrier BLUE CROSS BLUE SHIELI I Medical	from the options below. Insur D BLUE	ance Plan CROSS - BLUE SHIELD (BC)	F	Plan Coverage ndividual	Pr	emium 1406.36	
EFT & Payments EFT & Payments Employee Roster Insurance Insurance Insurance Oeduction Insurance Rates Employer Reports	XXXXX7668 >	Select 1 Medica	the Plan and Plan Coverage Il Insurance Carrier BLUE CROSS BLUE SHIELI I Medical Insurance Carrier	from the options below. Insur D BLUE	ance Plan CROSS - BLUE SHIELD (BC) ce Plan	F Plan Coverage	Yan Coverage ndividual	Pr	emium 1406.36 emium	
EFT & Payments EFT & Payments Employee Roster Insurance Deduction Insurance Obduction Insurance Rates Employer Reports	XXXXX7668 >	Select 1 Medica Second	the Plan and Plan Coverage Insurance Carrier BLUE CROSS BLUE SHIELI S Medical Insurance Carrier MEDEX HEALTH	from the options below. Insura D BLUE Insuran MEDEX	ance Plan CROSS - BLUE SHIELD (BC) ce Plan (MX)	Plan Coverage Senior	Plan Coverage ndividual	Pr S Pr S	emium :406.36 remium :197.63	
EFT & Payments EFT & Payments Employee Roster Insurance Deduction Insurance Obduction Insurance Rates Employer Reports	XXXXX7668 >	Select 1 Medica Second	the Plan and Plan Coverage Insurance Carrier BLUE CROSS BLUE SHIELI I Medical Insurance Carrier MEDEX HEALTH	from the options below. Insur D BLUE Insuran MEDEX	ance Plan CROSS - BLUE SHIELD (BC) ce Plan (MX)	Plan Coverage Senior	Plan Coverage	Pr S Pr S	emium 406.36 emium 197.63	

8. On the *Coverage Details* page, correct the date(s) that need to be updated.

S MIF

Cancel

Remember that if you are entering a new Coverage Start Date, you may also have to correct the corresponding Coverage Stop Date as well. There should not be a gap between the two unless there is an intentional gap in coverage (such as rate holiday). Once your dates are corrected, click Next.

MTRS	1007 - AVIARY P					10.00 11.00	Welcome Wadger	wa 🕣
🕈 Home	Member Ins	Retiree Enrollment				×	Add/Change Coverage	. ± ¥
Employer Information	Search: Dove. or	Ø —	o	o	0	0		Export Filters
 Payroll Calendar Import History 	SSN	Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm	Stop Date	Premium Amount
Deduction Reports	XXX-XX-7668 >	Dove, Deb E	XXX-XX-7669	956333	Corr	ect Ehrollment		\$2.49 \$197.63
\$ EFT & Payments	XXX-XX-7668 >							\$406.36
Retiree Insurance		Please choose the appropria	ate start and stop dates for your en	rollment selections				
Selections Insurance Deduction History	1	Medical Actions New or Existing	? Carrier / Plan / Coverage Op	tion	Coverage Start Da	te Coverage Stop Date		
Insurance Rates		New Coverage	BLUE CROSS BLUE SHIELD/BLUE CRO	SS - BLUE SHIELD (BC)/Individual	02/01/2024			
Employer Reports		Second Medical Actions New or Existin	no? Carrier / Plan / Covera	ine Ontion C	overage Start Date	Coverage Stop Date		
		New Coverage	MEDEX HEALTH/MEDEX (MX	VSenior 0	2/01/2024			
		Basic Life	no? Carrier / Blan / Country	an Ontion	ouesee Start Date	Courses Stap Date		
		New Coverage	BASIC LIFE/BASIC LIFE (2000		2/01/2024			
	S MIR	Cancel				Previous	ech Systems Sub LLC 2021.	All rights reserved.

Previo

Next

\$406.36

If the coverage change you are making requires a retroactive period, this message is displayed, click Yes.



For an example where the correction is to existing coverage and new coverage is being set to an earlier start date, not fixing the corresponding stop date for the earlier plan will result in this error message.

MTRS	🗄 9007 - AVIAR						Welcome Wa	Iger Will MyTRD Account Settings) Logest
A Home	Memberl	Retiree Enrollment					×	Add/Channa Coverage	
Employer Information	Member	Error						Addrenange coverage	Export
🖹 Payroll Calendar		The Start Date of 01/01/20	24 for MED is before the	Stop Date of 01/31/2024. Co	overage dates in the same	Fund cannot overlap.			
1 Import History		0	0	0	0				
	-	Select Member	Select Event	Select Coverages	Coverage Details	Review & Contirm			

9. On the *Review & Confirm* page, click **Confirm**.

Myrs	1 9007 - AVIARY P		2							Welcome Wadger	WB MyTRS Account Sat	Enga Logost
A Home	Member Ins	Retiree Enrollmer	n						×	Add/Change	Coverage	. T
Employer Information		0	0	0		0		0			LO	sit (Filters
Payroll Celender	Search: Dove, de	Select Me	nber Select Eve	nt Select Cove	rages	Coverage Deta	ails	Review & Conf	irm			
nport History	SSN									Stop Date	Pre	mium Amount
Deduction Reports	XXX-XX-7668 >	Please review and co	onfirm the Enrollment details.									\$2.49
CET & Promote	XXX-XX-7668 >	Member Info										\$406.36
	BABABALISES *	Member Name	SSN	Me	rber Natiber		Event					
Refiree Instraince		Dove, Deb E	XXX-XX-7008	.95	6333		Correct Er	rolment				
Selections	-	Premium info										
(1) Insurance Deduction History		New Cost	Desemblants		revious Cost	rama la cons						
Insurance Rates		\$606.48	Premium		aandard Member P 606.48	remium						
Employer Reports												
		Enrolled Plans										
		Coverage Type	Insurance Carrier	Insurance Plan	Plan Co	overage St	tart Date	Stop Date	Premium			
		Second Medical	MEDEX HEALTH	MEDEX (MX)	Senior	02	2/01/2024		\$197.63			
		Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individu	Jal 02	2/01/2024		\$2.49			
		Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIE	LD (BC) Individu	ual 01	2/01/2024		\$406.36			
									9			
	S MTR	Cancel						Previous	Confirm	ech Systems Sub L	LC 2021 All right	s reserved
	-					_	_	_	_			

A rebill will be generated.



Now your correction is complete.

Myrrs	9007 - AVIARY PUB	SLIC SCHOOLS					Welco	me Wadger 📗 Myttis	WB Account Settings	E Logost
✿ Home Employer Information	Member Insur	ance Maintenance						Add/Change Coverag	e 🛓	T Filters
E Payroll Calendar	Search: dove, deb	0								
1 Import History	SSN	Member Number	Member Name	Coverage Type	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premiu	m Amount
	<u>XXX-XX-7668</u> >	956333	Dove, Deb E	Basic Life	BASIC LIFE (2000)	Individual	02/01/2024			\$2.49
Deduction Reports	<u>XXX-XX-7668</u> >	956333	Dove, Deb E	Second Medical	MEDEX (MX)	Senior	02/01/2024			\$197.63
\$ EFT & Payments	<u>XXX-XX-7668</u> >	956333	Dove, Deb E	Medical	BLUE CROSS - BLUE SHIELD (BC)	Individual	02/01/2024			\$406.36
Insurance Rates Employer Reports										
	S MIRS W	Yebsite >	P	Site Policy >	 Contact Us 	>	© Vitech	Systems Sub LLC 2021	All rights ret	served.

It is imperative that you go to the Insurance Deduction History screen in MyTRS to make sure the rebill calculated is the amount you expect to be calculated based on the coverage effective periods.

lome	Insurance Deduction Hi	istory / Insurance Transaction	s				
nployer Information							
yroll Calendar	Employee/Member Dove, Deb E			ss X0	N (X-XX-7668		
port History							
luction Reports	Insurance Transa	octions					Export Filters
& Payments	Trans # == [Transaction Date	Activity Date	Trans Type	Identifier	Status	Balance 1
ployee Roster	191222310 >	03/11/2024	01/01/2024	Premium Rebill	Rebill for 01/01/2024 - 01/31/2024	Open	(\$606.48)
ree Insurance	191207313 >	03/08/2024	01/01/2024	Premium Rebill	Adj. Bill for 01/01/2024 - 03/31/2024	Open	\$1,819.44
koyer Reports							

Chapter 9—Cancel Enrollments

In the case of a death for a retiree, please see the required procedure mentioned in the Retiree Insurance Guidelines in Chapter 2 of this guide.

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

1. Click **Retiree Insurance Selections** from the *Left navigation* menu on the *Home* page.

MTRS .	9007 - AVIARY PUBLIC SCHOOLS	Welcome Wadger Wig States Lagor
A Home	formula life and	News
Employer Information	I would like to	News
 Payroll Calendar Import History 	Payroll Calendar Generate Retiree Earnings Limit Calculator > ACCESS: > 01/02 Import History Import a Deduction Reports 2:3 consecutive business days each month, employers and members lose MyTRS access so we can process benefits. 2:3 consecutive business days each month, employers and members lose MyTRS access so we can process benefits. Deduction Reports 1 Import a Deduction Report File > Periodically, on Friday evenings at 6pm, we takedown MyTRS without notice, please plan accordingly.	ACCESS: > 01/02/2024
Deduction Reports	Import a Deduction Report File > Import and process a Deduction Report File	2-3 consecutive business days each month, employers and members lose MyTRS access so we can process benefits. Periodically, on Friday evenings at 6pm, we takedown MyTRS without notice, please plan accordingly.
 \$ EFT & Payments Employee Roster 	Register an Employee > Register an employee with your organization	ERROR reporting: Use this form to report any MyTRS technical issues you may experience. > 03/09/2023 ESS error reporting - MTRS (state.ma.us)
Retiree Insurance Selections Insurance Deduction History	1 Make a Bayment > Make a one time payment	
Insurance Rates Employer Reports	Image: Selections > Review individual retiree insurance selections	
	Run a Report > Run Retiree Insurance Deduction History, Pending Enrollment Report, etc.	

 Enter the retiree's name (last, first), MTRS member number or Social Security number (SSN) in the search field and press Enter on your keyboard or click Search to review your retiree's coverage before making a change.

MITRS	E 9007 - AVIARY PUBLIC SCHOOLS	Welcome Wadger	WB MyTRS Account Settings) Legeut
A Home	Member Insurance Maintenance		Add/Change Coverage	
 Payroll Calendar Import History 	2 Q Cassawaries, chris Search			
Deduction Reports				
Employee Roster				
Selections Insurance Deduction History				
 Insurance Rates Employer Reports 				

3. Click Add / Change Coverage.

MTRS	1 9007 - AVIARY PUBL	LIC SCHOOLS					Ň	Velcome Wadger	WE MyTRS Account Settings) Logost
♠ Home ■ Employer Information	Member Insura	ance Maintenance					3	Add/Change	Coverage 🛓	Filters
Payroll Calendar	Search: Cassawaries	a, chris 💿								
Import History	SSN	Member Number	Member Name	Coverage Type	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premiu	m Amount
	<u>XXX-XX-5932</u> >	126245	Cassawarles, Chris	Medical	TWO MEDEX'S (MX2)	Senior	01/01/2024			\$395.24
Deduction Reports	<u>XXX-XX-5932</u> >	126245	Cassawaries, Chris	Medical	TWO MEDEX'S (MX2)	Senior	01/01/2023	12/31/2023		\$379.92
\$ EFT & Payments	<u>XXX-XX-5932</u> >	126245	Cassawaries, Chris	Medical	TWO MEDEX'S (MX2)	Senior	01/01/2018	12/31/2022		\$395.42
Employee Roster	<u>XXX-XX-5932</u> >	126245	Cassawaries, Chris	Medical	TWO MEDEX'S (MX2)	Senior	01/01/2017	12/31/2017		\$389.88
Retiree Insurance	<u>XXX-XX-5932</u> >	126245	Cassawaries, Chris	Medical	TWO MEDEX'S (MX2)	Senior	09/01/2016	12/31/2016		\$350.40
Insurance Deduction History Insurance Rates Employer Reports										
	S MIRS W	ebsite >	E Site Pc	olicy >	• Contact	Us >	οv	itech Systems Sub Li	.C 2021. All rights res	erved.

4. Again, enter the retiree's name (last, first), MTRS member number or Social Security number (SSN) in the search field and press **Enter** on your keyboard.

MyRS	🖭 9007 - AVIARY P						Welcome Wadger	wis 🕣
🖨 Home	Member Ins	Retiree Enrollment				X	Add/Change Coverag	go 🛓 🍸
Employer Information		0	0	0	0			
🖹 Payroli Calendar	Search: Cassaw	Select Memb	er Select Event	Select Coverages	Coverage Details	Review & Confirm		
1mport History	SSN <u>XXX-XX-5932</u> >						Stop Date	Premium Amount \$395.24
Deduction Reports	<u>XXX-XX-5932</u> >	Please select the mem	ber that this enrollment is for				12/31/2023	\$379.92
\$ EFT & Payments	<u>XXX-XX-5932</u> >	Q Cassawaries o	hris			Search	12/31/2022	\$395.42
K Employee Roster	<u>XXX-XX-5932</u> >	Member Name	4	SSN	Member Number	Status	12/31/2017	\$389.88
Retiree Insurance	XXX-XX-5932 >	O ALBATROSSES	s, AMY	XXX-XX-4579	192667	Retired	12/31/2016	\$350.40
Insurance Deduction		O ANHINGA, ALI	CE	XXX-XX-2138	951700	Active		
5 Insurance Rates		O BLACKBIRD, B	ARBARA	XXX-XX-5174	144655	Retired		
Employer Danorts		O BLUE JAY, BON	INIE	XXX-XX-2844	211699	Retired		
		O BUDGERIGAR,	HELEN	XXX-XX-3714	136979	Deceased		
		O BULFINCH, BE	TTY	XXX-XX-8133	959349	Active		
		O CASSAWARIES	5. CHRIS	XXX-XX-5932	126245	Retired		
		O CUCKOOS, DIA	NE	XXX-XX-4886	343773	Retired		
		O DOVE, DEB E		XXX-XX-7668	956333	Inactive		
		O FALCON, FRAM	ŧK.	XXX-XX-4464	247600	Retired		
		O GOLDFINCH, J	IENNA	XXX-XX-8744	78314	Deceased		
		Cancel				Mart	ech Systems Sub LLC 2021	All rights reserved
	W MTRS	Gancer				Trext.		

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

- MJRS **2** 1 9007 - AVIARY F x Retiree Enrollment T + Member In Add/Change Coverage 0 0 0 0 0 Search: Cassa Select Event Coverage Details Review & Confirm Select Coverages Select Member SSN Stop Date m Amount XXX-XX-5932 : \$395.24 <u>XXX-XX-5932</u> : Please select the member that this enrollment is for \$395.42 XXX-XX-5932 Search Q Cassawaries, chris \$389.88 XXX-XX-5932 SSN Status Member Name Member Number 12/31/2016 \$350.40 Retiree Insurance 5 CASSAWARIES, CHRIS 126245 XXX-XX-5932 Retired ۲ 9 Insurance Dedu History Employer Reports 5 Cancel Sup LLC 2021 All rig Next S MTR
- 5. Click the radio button for the member you searched for and click Next.

6. Click Cancel Enrollment.

MATRS	1 9007 - AVIARY P	Betiles Engliment					~	Rcome Wadger	WE 🕣
A Home	Member Ins	Retiree Enrollment					^	Add/Change Co	verage 🛓 🍸
Employer Information		0	0	0	0	0	1		
🛱 Payroll Calendar	Search: Cassaw	Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm			
1 Import History	SSN XXX-XX-5932 >	Member Name Cassavaries, Chris	58N XXX-XX-5932	Member Number 126245	Event Cancel I	Enrollment		Stop Date	Premium Amount \$395.24
Deduction Reports	<u>XXX-XX-5932</u> >			0.0000.01			- 1	12/31/2023	\$379.92
\$ EFT & Payments	<u>XXX-XX-5932</u> >	6						12/31/2022	\$395.42
11 Frankwee Roster	<u>XXX-XX-5932</u> >	Please select the event th	riggering this enrollment.					12/31/2017	\$389.88
Retiree Insurance	XXX-XX-5932 >							12/31/2016	\$350.40
Selections Insurance Deduction History Insurance Rates Employer Reports		CANCEL ENRI		CHANGE ENROLLMENT	CORRECT	ENROLLMENT			
				INITIAL ENROLLMENT					
		Event Details					l		
		Event Date*							
٤	© MIR	Cancel				Previous	Next	ech Systems Sub LLC	2021. All rights reserved
۲	-								

The following fields will appear:

Event Date—Pre-filled with today's date.

Coverage Start Date — This is the coverage STOP date, so it should be the last day of the coverage month. (e.g., if you want to end coverage for the September 1 premium, the Coverage Start Date should be 8/31).

This date **MUST** be changed the correct start date, the first day of the month for Initial, Change and Correct coverage or the last day of the month for Cancelling coverage. Failure to enter a correct date or try to use a date prior to your retiree's retirement date, will result in the following error.

Retiree Enrollment					×
Error Invalid Coverage Start Date.					
O	2	3		5	
Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm	

7. Once the date is fixed, click **Next**.

Retiree Enrollment Step 2: Select Event			×
Member Name Cassawaries, Chris	SSN XXX-XX-5932	Member Number 126245	Event Cancel Enrollment
Please select the event that is trig	gering this enrollment.		
CANCEL ENROL		CHANGE ENROLLMENT	CORRECT ENROLLMENT
		INITIAL ENROLLMENT	
Event Details			
Event Date* 03/11/2024 Coverage Start Date* 01/31/2024			7 × E
Cancel			Previous
8. On the *Select Coverages* page, click **Next**

MyRS	1 9007 - AVIARY P						Welcome Wadger	WS E MyTHE Account Bettings Logist
A Home	Member Ins	Retiree Enrollment				×	Add/Change Co	werage ± Y
Employer Information		0	0	0	0	0		Dont Plan
Payroll Calendar	Search: Cassave	Select Member	Select Event	Select Coverages	Coverage Details	Review & Confirm		
1 Import History	SSN	Member Name	SSN	Meniber Number	5-en		Stop Date	Premium Amount
Deduction Reports	XXX-XX-5932 >	Cassawaries, Chris	XXX-XX-5932	126245	Cancel	Enrollment	12/31/2023	\$379.92
\$ EFT & Payments	XXX-XX-5932 >						12/31/2022	\$395.42
Employee Roster	<u>XXX-XX-5932</u> >	Select the Plan and Plan Cove	rage from the options below.				12/31/2017	\$389.88
Retiree Insurance	<u>XXX-XX-5932</u> >						12/31/2016	\$350.40
Resurance Deduction		Medical			20020	2.0		
History		Insurance Carrier	Insurance Pl	lan	Plan Coverage	Premium \$305.24		
		MEDEA HEALTH	THO MEDER	sa (mna)	240101	44147.		
Employer Reports								
						0		
	-							
	S MIR	Cancel				Previous Next	ech Systems Sub LLC	2021. All rights reserved.
×						_		

- 9. On the *Coverage Details* page, enter the appropriate Coverage 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 February 1 premium, the Coverage Stop Date should be 01/31).
 - If the Stop Date you enter is in the past, MyTRS will automatically process a refund (negative rebill) of deductions that will be processed on the next warrant.
 - If you delete the row entirely (by clicking the **Delete** link to the left of the coverage), ALL the deductions the retiree has paid associated to that row will be refunded on the retiree payroll.

	Member Ins									Add/Change Co	werage	±	T
			0	0	0		9	0				2002	Titlers .
	Search: Cassive	1	Select Member	Select Event	Select Coverages	Coverag	e Details	Review & Confin	m	Stop Date -	2	vambum	Amoun
	XXX-XX-5932 >	Member Name Castawarie	a Chris	50N XXX-XX-5032	Member Number 126245		Der Ce	n ncel Fotoliment		Stop Date			\$395.24
	<u>XXX-XX-5932</u> >									12/31/2023			\$379.92
	<u>XXX-XX-5932</u> >									12/31/2022			\$395.42
	XXX-XX-5932 >	Please choo	se the appropriate start	and stop dates for your	enroliment selections			0		12/31/2017			\$389.88
	XXX-XX-5932 >							9		12/31/2016			\$350.40
sction		Medical Actions	New or Existing?	Carrier / Plan / Cov	erage Option	Coverage Start	Date	Coverag, Stop Dat					
		Delete	Existing Coverage	MEDEX HEALTH/TWO ME	DEX(S (MX2)/Senior	01/01/2024		01/31/ <mark>2024</mark> × 1	7				
		Delete	Existing Coverage	MEDEX HEALTH/TWO ME	DEX'S (MX2)/Service	01/01/2023	Ð	12/31/2023	3				
		Delete	Existing Coverage	MEDEX HEALTH/TWO ME	DEX'S (MX2)/Serior	01/01/2018		12/31/2022	3				
		Delete	Existing Coverage	MEDEX HEALTH/TWO ME	DEX'S (MX2)/Senior	01/01/2017		12/31/2017	5				
		Delete	Existing Coverage	MEDEX HEALTH/TWO ME	DEX'S (MX2)/Senior	09/01/2016		12/31/2016	10				
		Control								ech Systems Sub LLC	2023 All ric	hts rese	evad.

Click Next

Hama		Retiree Enrollmen	t					×		UyTRS Azznard Settings Engod
Employer Information	Member Ins	0		0	0	0	0		Add/Change Co	verage 🛓 📍
Payroll Calendar	Search: Cassawi	Select Men	iber Sele	ect Event :	Select Coverages	Coverage Details	Review & Cont	irm		
	SSN				1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 -	10100000000000000			Stop Date	Premium Amou
port History	XXX-XX-5932 >	Please review and co	nfirm the Enrollment de	tails.						\$395.2
duction Reports	XXX-XX-5932 >								12/31/2023	\$379.5
	XXX-XX-5932 >	Member Info							12/31/2022	\$395.4
waa Rostar	XXX-XX-5932 >	Member Name Cassawaries, Chris	SSN XXX-X	65932	Member Number 126245	Ei C	vert. Sancel Enrollment		12/31/2017	\$389.8
e Insurance	XXX-XX-5932 >								12/31/2016	\$350.4
ons		Premium Info								
ice Deduction		New Cost \$0.00			Previous Cost Standard Membe	r Premium				
		Enrolled Plans								
		Coverage Type	Insurance Carrier	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premium		
		Medical	MEDEX HEALTH	TWO MEDEX'S (MX)	2) Senior	01/01/2024	01/31/2024	\$395.24		
		Medical	MEDEX HEALTH	TWO MEDEX'S (MX)	2) Senior	01/01/2023	12/31/2023	\$379.92		
		Medical	MEDEX HEALTH	TWO MEDEX'S (MX)	2) Senior	01/01/2018	12/31/2022	\$395.42		
		Medical	MEDEX HEALTH	TWO MEDEX'S (MX)	?) Senior	01/01/2017	12/31/2017	10		
		Medical	MEDEX HEALTH	TWO MEDEX'S (MX)	2) Senior	09/01/2016	12/31/2016			
		[Orman]					Distant		ach Systems Sub I I C	2021. All rights reserved

10. On the *Review & Confirm* page, click **Confirm**.

A rebill will be generated in this example so this message will display.



Now the member will display with the coverage cancelled.

My Ro	1 9007 - AVIARY PUB	LIC SCHOOLS					We	Ncome Wadger	wB count Settings) Logost
Home	Member Insura	ance Maintenance						Add/Change Coverage	£ Export	T Filters
Payroll Calendar	Search: Cassawaries	s, chris 🔘								
moort Liston	SSN	Member Number	Member Name	Coverage Type	Insurance Plan 11	Plan Coverage	Start Date 💷	Stop Date	Premium	Amour
	XXX-XX-5932 >	126245	Cassawaries, Chris	Medical	TWO MEDEX'S (MX2)	Senior	01/01/2024	01/31/2024		\$395.2
n Reports	XXX-XX-5932 >	126245	Cassawaries, Chris	Medical	TWO MEDEX'S (MX2)	Senior	01/01/2023	12/31/2023		\$379.9
ients	XXX-XX-5932 >	126245	Cassawaries, Chris	Medical	TWO MEDEX'S (MX2)	Senior	01/01/2018	12/31/2022		\$395.4
tor	XXX-XX-5932 >	126245	Cassawaries, Chris	Medical	TWO MEDEX'S (MX2)	Senior	01/01/2017	12/31/2017		\$389.8
	XXX-XX-5932 >	126245	Cassawaries, Chris	Medical	TWO MEDEX'S (MX2)	Senior	09/01/2016	12/31/2016		\$350.4
loyer Reports										

It is imperative that you go to the Insurance Deduction History screen in MyTRS to make sure the rebill calculated is the amount you expect to be calculated based on the coverage effective periods.

MTRS	9007 - AVIARY PUBLI	C SCHOOLS				Welcome Wadger	WB 🕣
🔒 Home	Insurance Deduction I	History / Insurance Transacti	ons				
Employer Information							
Payroll Calendar	Employee/Member Cassawaries Chris			SEN XXX-XX	5932		
Import History							
Deduction Reports	Insurance Trans	actions					
\$ EFT & Payments	Trans #	Transaction Date	Activity Date	Trans Type	Identifier	Status	Balanc
🚉 Employee Roster	<u>191217316</u> >	03/11/2024	02/01/2024	Premium Rebill	Rebill for 02/01/2024 - 03/31/2024	Open	(\$790.48)
Retiree Insurance	191123488 >	02/15/2024	02/15/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
Insurance Deduction	190996768 >	02/15/2024	03/01/2024	Premium Bill	EBILL for 03/01/2024 - 03/31/2024	Closed	\$0.00
History	185203460 >	01/22/2024	01/22/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
Insurance Rates	185120593 >	01/22/2024	02/01/2024	Premium Bill	EBILL for 02/01/2024 - 02/29/2024	Closed	\$0.00
I. Employer Reports	179404973 >	12/19/2023	12/19/2023	Disbursement Deduction	Disb Request	Closed	\$0.00
	179266485 >	12/19/2023	01/01/2024	Premium Bill	EBILL for 01/01/2024 - 01/31/2024	Closed	\$0.00
	174073454 >	11/16/2023	11/16/2023	Disbursement Deduction	Disb Request	Closed	\$0.00
	173909045 >	11/16/2023	12/01/2023	Premium Bill	EBILL for 12/01/2023 - 12/31/2023	Closed	\$0.00
	168400122 >	10/19/2023	10/19/2023	Disbursement Deduction	Disb Request	Closed	\$0.00
	168281212 >	10/19/2023	11/01/2023	Premium Bill	EBILL for 11/01/2023 - 11/30/2023	Closed	\$0.00
	162517283 >	09/20/2023	09/20/2023	Disbursement Deduction	Disb Request	Closed	\$0.00
	<u>162448893</u> >	09/20/2023	10/01/2023	Premium Bill	EBILL for 10/01/2023 - 10/31/2023	Closed	\$0.00
	156576411 >	08/22/2023	08/22/2023	Disbursement Deduction	Disb Request	Closed	\$0.00
	156433756 >	08/22/2023	09/01/2023	Premium Bill	EBILL for 09/01/2023 - 09/30/2023	Closed	\$0.00
	1-15 of 186					IC C Page 1	of 13 > >1

Chapter 10—Check Insurance Deduction History

Reviewing historical transactions in MyTRS.

MyTRS allows you to view the insurance deductions that have been taken from a retiree's check. Previously processed transactions for a retiree can be viewed in MyTRS via the *Insurance Deduction History* link in the left navigation menu.

There are 3 types of transactions viewable:

- Premium Bill This is the standard transaction created by the retiree payroll that bills the member for insurance. All insurance types are rolled into one bill each month.
- Disbursement Deduction This is the standard transaction processed during the retiree payroll through which MyTRS processes the bill and applies funds from the retiree's benefit to pay the employer as part of the monthly insurance check.
- Premium Rebill When there is a retroactive insurance coverage change in MyTRS, the system will automatically calculate the refund or balance due amount. These adjustments in MyTRS are called "rebills." Premium Rebills are calculated by taking the difference between what was deducted from a retiree before the change and what should have been deducted based on the change entered. Rebills can be created to retroactively bill a member (shows in black text) or to refund a member, shows in red text and in brackets. A simple way to remember which is which is to think of it as black = bill to the retiree while red = refund to the retiree.

When you make coverage changes that are retroactive it is very important to check the Insurance Deduction History screen to ensure that a rebill has been created and is for the correct amount.

To check a transaction:

1. Click Insurance Deduction History from the left navigation menu.

MTRS] 9007 - AVIARY PUBLIC SCHOOLS	Welcome Wadger	WB MyTRS Account Settings	1 Logod
A Home	Member Insurance Deduction History			
 Payroll Calendar Import History 	Q. Member Number, Name or SSN			
Deduction Reports				
\$ EFT & Payments # Employee Roster				
Retiree Insurance Selections Insurance Deduction History	-1			
Insurance Rates Employer Deports				
E Employer Reports				
	MTRS Website > Site Policy > Contact Us >	© Vitech Systems Sub L	LC 2021. All rights res	erved.

2. Enter the retiree's name (last, first), MTRS member number or Social Security number (SSN) in the Search field and press **Enter** on your keyboard or clicking **Search**.

MITRS .	9007 - AVIARY PUBLIC SCHOOLS	Welcome Wadger	WB MyTRS Account Settings) Logovi
A Home ■ Employer Information	Member Insurance Deduction History			
📄 Payroli Calendar 🚖 Import History	2 Q Peafowl petu Search			
Deduction Reports				
Employee Roster				
Insurance Deduction History Insurance Rates				
d. Employer Reports				
		n Vitarh Svetame Sith I	LC 2021 All rights race	arroad
	MTRS.Website > Site Policy > Contact.Us >	w viteon systems Sub i	LLG ZUZ I, All rights resi	erveo.

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

3. Once your retiree appears, click on your employee's masked SSN to open their account:

MITRS	3 9007 - AVIARY PUBLIC SCHOOLS			Welcome Wadger	WB MyTRS Account Settings) Legeut
✿ Home ➡ Employer Information	Member Insurance Deduction History					Fitters
🖻 Payroll Calendar	Search: Peafowi, petu 💿					
1mport History	SSN	Member Number	Name 🗐	Member Status		
Deduction Reports	XXX-XX-2175 > 📀	258350	PEAFOWL, PETUNIA	Retired		
 § EFT & Payments A Employee Roster Retiree Insurance Selections Insurance Deduction History Insurance Rates Employer Reports 	3					
*	MIRS Website >	Site Policy >	Contact Us >	© Vitech Systems Sub LL	C 2021. All rights rese	rved.

4. Once your retiree's account opens, you'll see any open rebills and/or processed transactions from previous retiree payrolls.

Notes:

- a. The Transaction Date is the date that the entry was made.
- b. The Activity Date is the effective date of the change.
- c. The Status field will show as "Open" if a bill or rebill will be processed on the next retiree payroll and "Closed" if it has already been processed on a prior retiree payroll.
- d. The Balance field will be \$0.00 for all closed transactions.

When a rebill has been generated, it will be listed as "Rebill..." under the Identifier column. The rebill amount will only be listed as open until the warrant is processed.

In our example, Petunia has both open rebills and a history of closed transactions. Petunia happens to have both positive and negative rebills from a complex correction from another section of our materials.

5. To see the details of a rebill, click on the **Transaction** #.

MJTRS	1 9007 - AVIARY PUBLIC	C SCHOOLS				Welcome Wadger	will MyTRS Account Settings	Engent
↑ Home Employer Information	Insurance Deduction H	listory / Insurance Transaction	ons					
🛱 Payroll Calendar	Emperer Pererunia			SSN XXX-XX-	2175			_
1 Import History	_ ວ	4 a	4b			4 c	4c	
Deduction Reports	Insuince Transa	actions						r
S EFT & Payments								itters
•	Trans # = 1	Transaction Date	Activity Date	Trans Type	Identifier	Status	Balance	e BI
K Employee Roster	<u>191217310</u> >	03/11/2024	01/01/2024	Premium Rebill	Rebill for 01/01/2024 - 03/31/2024	Open	\$59	2.89
Retiree Insurance Selections	191212313 >	03/11/2024	01/01/2024	Premium Rebill	Rebill for 01/01/2024 - 03/31/2024	Open	(\$592	2.89)
Insurance Deduction	191212310 >	03/11/2024	12/01/2023	Premium Rebill	Rebill for 12/01/2023 - 03/31/2024	Open	(\$540	0.11)
History	191116902 >	02/15/2024	02/15/2024	Disbursement Deduction	Disb Request	Closed	I S	\$0.00
s insurance Rates	<u>191116901</u> >	02/15/2024	02/15/2024	Disbursement Deduction	Disb Request	Closed	i s	\$0.00
III Employer Reports	190996762 >	02/15/2024	03/01/2024	Premium Bill	EBILL for 03/01/2024 - 03/31/2024	Closed	i s	0.00
	<u>185169310</u> >	01/22/2024	01/22/2024	Disbursement Deduction	Disb Request	Closed	i s	\$0.00
	185169309 >	01/22/2024	01/22/2024	Disbursement Deduction	Disb Request	Closed	i S	\$0.00
	185120587 >	01/22/2024	02/01/2024	Premium Bill	EBILL for 02/01/2024 - 02/29/2024	Closed	i s	0.00
	179335833 >	12/19/2023	12/19/2023	Disbursement Deduction	Disb Request	Closed	i s	\$0.00
	179335832 >	12/19/2023	12/19/2023	Disbursement Deduction	Disb Request	Closed	i ş	\$0.00
	<u>179266479</u> >	12/19/2023	01/01/2024	Premium Bill	EBILL for 01/01/2024 - 01/31/2024	Closed	i s	\$0.00
	173957763 >	11/16/2023	11/16/2023	Disbursement Deduction	Disb Request	Closed	i s	\$0.00
	<u>173957762</u> >	11/16/2023	11/16/2023	Disbursement Deduction	Disb Request	Closed	s s	\$0.00
	<u>173909040</u> >	11/16/2023	12/01/2023	Premium Bill	EBILL for 12/01/2023 - 12/31/2023	Closed	i S	\$0.00
<	1 - 15 of 173					IC C Page 1	of 12 > >	ч.,

If the rebill is a bill, the total balance will be in black font and if the rebill is a refund, the total balance will be in red font and in parentheses.

6. Once the transaction opens, you can see the activity date, billing details by insurance category, the transaction total and the period the rebill covers. The same options are available for Premium Bills and Disbursement

🟫 Home	Insurance Deduc	tion History / Insurance 1	Transactions / Tran	saction Details								
Employer Information	Transaction	Summary										
Payroll Calendar			-			•						
Import History	01/01/2024	191212313	Prem	ium Rebill		Rebill for 01/01	/2024 - 03/31/202	4	Open		(\$592.89)	
Deduction Reports	Description of the second											
EFT & Payments	Transaction	Details										
Employee Roster	Activity Date	Type	Total Amount	Medical	Second Medical	Third Medical	Basic Life	Optional Life	Dental	Vision	GIC-Medical	GIC Dents
Retiree Insurance Selections	01/01/2024	Original	(\$592.89)	(\$592.89)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.0
9 Insurance Deduction History												
3 Insurance Rates												
I. Employer Reports												

7. To return to the account, click on the **Insurance Transactions** and you'll be returned to the list of transactions.

MTRS	臣 9007 - AVIARY PUBLIC SCHOOLS	Welcome Wadger we 문 Wythis Account Sentings Lage	3
A Home	Insurance Deduction History / Insurance Transactions / Transaction Details		

This will return you the Insurance Deduction History Screen.

MTRS	1 9007 - AVIARY PUBLIC	C SCHOOLS				Welcome Wadger	WB 🕀
🔒 Home	Insurance Deduction H	listory / Insurance Transaction	ons				
Employer Information							
Payroll Calendar	Employee/Member Peafowl, Petunia			SSN XXX-XX	2175		1
1mport History	-						11.00
Deduction Reports	Insurance Trans	actions					Export Fibers
\$ EFT & Payments	Trans # 1	Transaction Date	Activity Date	Trans Type	Identifier	Status	Balance
2 Employee Roster	191217310 >	03/11/2024	01/01/2024	Premium Rebill	Rebill for 01/01/2024 - 03/31/2024	Open	\$592.89
Retiree Insurance Selections	191212313 >	03/11/2024	01/01/2024	Premium Rebill	Rebill for 01/01/2024 - 03/31/2024	Open	(\$592.89)
Insurance Deduction	191212310 >	03/11/2024	12/01/2023	Premium Rebill	Rebill for 12/01/2023 - 03/31/2024	Open	(\$540.11)
History	191116902 >	02/15/2024	02/15/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
Insurance Rates	<u>191116901</u> >	02/15/2024	02/15/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
Employer Reports	190996762 >	02/15/2024	03/01/2024	Premium Bill	EBILL for 03/01/2024 - 03/31/2024	Closed	\$0.00
	185169310 >	01/22/2024	01/22/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
	185169309 >	01/22/2024	01/22/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
	185120587 >	01/22/2024	02/01/2024	Premium Bill	EBILL for 02/01/2024 - 02/29/2024	Closed	\$0.00
	179335833 >	12/19/2023	12/19/2023	Disbursement Deduction	Disb Request	Closed	\$0.00
	179335832 >	12/19/2023	12/19/2023	Disbursement Deduction	Disb Request	Closed	\$0.00
	179266479 >	12/19/2023	01/01/2024	Premium Bill	EBILL for 01/01/2024 - 01/31/2024	Closed	\$0.00
	<u>173957763</u> >	11/16/2023	11/16/2023	Disbursement Deduction	Disb Request	Closed	\$0.00
	173957762 >	11/16/2023	11/16/2023	Disbursement Deduction	Disb Request	Closed	\$0.00
	173909040 >	11/16/2023	12/01/2023	Premium Bill	EBILL for 12/01/2023 - 12/31/2023	Closed	\$0.00
3	1 - 15 of 173					IC C Page 1	of 12 >>1

Chapter 11—Insurance Reports

MyTRS allows employers to view and download four distinct reports to manage their insurance process and meet their reporting needs.

1. Click *Employer Reports* from the left navigation menu.

MTRS	9007 - AVIARY PUBLIC SCHOOLS	Welcome Wadger with State State Control of State Sta
Home Employer Information	I would like to	News
 Payroll Calendar Import History 	Generate Retiree Earnings Limit Calculator > Retiree Earnings Limit Calculator	ACCESS: > 01/02/2024 2-3 consecutive business days each month, employers and members lose MyTRS access so we can process benefits.
 Deduction Reports \$ EFT & Payments 	Import a Deduction Report File > Import and process a Deduction Report File	Periodically, on Friday evenings at 6pm, we takedown MyTRS without notice, please plan accordingly. ERROR reporting: Use this form to report any MyTRS technical issues you may experience. > 03/09/2023
Employee Roster Retiree Insurance Selections	Register an Employee > Register an employee with your organization	ESS error reporting - MTRS (state ma.us)
Insurance Deduction History Insurance Rates	Make a Payment > Make a one time payment	
Employer Reports	Review individual retiree insurance selections Run a Report >	
	Run Retiree Insurance Deduction History, Pending Enrollment Report, etc.	
	MIRS Website > Site Pol	Icy > Contact Us > © Vitech Systems Sub LLC 2021. All rights reserved.

2. Click Schedule Report.

MJTRS .	3 9007 - AVIARY PUBLIC SCHOOLS		Welcome Wadger ww E MyTRS Account Settings Logost
🔒 Home	Reports take up to 30 minutes to generate, please	return later to download your report. Reports remain available until 9pm each night.	
Employer Information			2
📄 Payroll Calendar	Reports		Schedule Report
1 Import History	Report	Submitted By	Status
Deduction Reports	Employer_GASB45 Report >	WBYRD1234 on 03/12/2024 11:10 AM	Not processed
C FET & Payments	Employer GASB45 Report >	WBYRD1234 on 03/07/2024 09:00 AM	Processed successfully
5 ci rarajmento	Employer GASB45 Report >	WBYRD1234 on 03/06/2024 05:15 PM	Processed successfully
Employee Roster	Monthly Insurance Deduction Report >	WBYRD1234 on 03/06/2024 05:13 PM	Processed successfully
Selections Insurance Deduction History Insurance Rates			
Employer Reports			© Vitech Systems Sub LLC 2021 All rights
	S MTRS Website >	Site Policy. > Gontact Us >	w viteon systems SUD LLC 2021. All rights reserved.



2. Select the report you want to schedule, click Next.

Explanation of each report:

- *Employer GASB report*—This report can be exported to be used for your actuarial reporting. It can also be used export contact information for open enrollment.
- *Employer Insurance plan list*—This report allows employers to export their insurance plans.
- *Members Pending Enrollment*—This is not a retiree insurance report, it lists members who failed to enroll for MTRS membership.
- *Monthly Insurance Deduction Report*—This is the standard report most employers use to balance their insurance payment against their insurance roster from their carrier(s).
- *Monthly Insurance Deduction Report by Provider*—This report organizes monthly deductions by carrier type and plans.

- 3. On the Report Parameters page:
 - a. Select the file Export Type you prefer (PDF or CSV). We'd recommend CSV (opens in Excel).
 - b. Leave the Run Date as-is.
 - c. The Employer Code will be pre-filled with your employer code and cannot be changed.
 - d. Enter the deduction month you'd like to be contained in the report.

The report month defaults to the current month and year. You will need to change this date if the month's retirement payroll hasn't been processed, or if you want to access a prior month's report. You should enter the mm/yyyy for the check you are pulling a report for.

e. Click Schedule.



This message will be displayed if the data you entered is sufficient and the queued report will be displayed with a Status of "Not Processed."

MJRS	1 9007 - AVIARY PUBLIC S	Monthly Insurance Deduction Report* has been scheduled and will begin momentarily.	×	Welcome Wadger wn 🗲 MyTBS Account Settings Logost
🛧 Home	Reports take up to 30 minutes to generate, plea	ase return later to download your report. Reports remain available until 9pm eac	ch night.	
Employer Information	11000			
📄 Payroll Calendar	Reports			Schedule Report
1 Import History	Report	Submitted By		Status
Deduction Reports	Monthly Insurance Deduction Report >	WBYRD1234 on 03/12/2024 11:15 AM		Not processed
A 177 A 200	Employer GASB45 Report >	WBYRD1234 on 03/12/2024 11:10 AM		Processed successfully

4. When the report has been successfully processed, This message will be displayed and the report status will update to "processed." Click the Report link to open report.

MTRS	1 9007 - AVIARY PUBLIC SCHOOLS	Report "Monthly Insurance Deduction Report" is ready to view.	Welcome Wadger	WB 🕤					
🔒 Home	Reports take up to 30 minutes to generate, please	Reports take up to 30 minutes to generate, please return later to download your report. Reports remain available until 9pm each night.							
 Employer Information Payroll Calendar 	Reports	Reports Schedule Report							
1 Import History	Report	Submitted By	Status						
Deduction Reports	Monthly Insurance Deduction Report >	WBYRD1234 on 03/12/2024 11:15 AM	Processed successf	ully					
A FET & Baumanta	Employer GASB45 Report >	WBYRD1234 on 03/12/2024 11:10 AM	Processed successf	ully					

Depending on the browser you are using to access MyTRS, and the format you chose, the report will download or open accordingly.

For example, in Edge .csv files will not automatically open.



Sample view of a csv report:

	A	В	с	D	E		G	н	I	J	к	
1	Monthly I	nsurance D	eduction I	Report for	12/2023							
2	Employer	: 9007 - AVI	ARY PUBLI	C SCHOOL	S							
3	Total Pren	nium: \$5,2	58.96									
4	No. of Me	mbers: 19										
5	Name	SSN	MED	MED 2	MED 3	LIFE	OPT LIFE	DENTAL	VISION	Total Pren	nium	
6	ALBATROS	XXX-XX-45	197.63	197.63	0	0	0	0	0	\$395.26		
	BLACKBIR	XXX-XX-51	330.74	0	0	2.49	0	47.83	0	\$381.06		
8	BLUE JAY,	XXX-XX-28	197.63	0	0	0	0	0	0	\$197.63		
9	BUDGERIG	XXX-XX-37	197.63	0	0	2.49	0	47.83	0	\$247.95		
10	CASSAWA	XXX-XX-59	395.24	0	0	0	0	0	0	\$395.24		
11	HORNBILL	XXX-XX-71	330.74	0	0	0	0	47.83	0	\$378.57		
12	KINGFISH	XXX-XX-40	406.36	0	0	2.49	0	47.83	0	\$456.68		
13	MALLARD,	XXX-XX-65	197.63	197.63	0	2.49	0	0	0	\$397.75		
14	NYCTIBIUS	XXX-XX-18	0	0	0	2.49	0	95.64	0	\$98.13		
15	PASSERIN	XXX-XX-01	197.63	0	0	0	0	0	0	\$197.63		
16	PEAFOWL	XXX-XX-21	330.74	197.63	0	0	0	0	0	\$528.37		
17	PENGUIN,	XXX-XX-52	197.63	0	0	0	0	47.83	0	\$245.46		
18	RAVEN, R	XXX-XX-67	0	0	0	2.49	0	0	0	\$2.49		
19	REDTAIL, F	XXX-XX-60	197.63	0	0	0	0	0	0	\$197.63		
20	ROBINS, R	XXX-XX-70	197.63	0	0	0	0	47.83	0	\$245.46		
21	SPARROW	XXX-XX-22	197.63	0	0	2.49	0	0	0	\$200.12		
22	STORK, SA	XXX-XX-42	197.63	0	0	2.49	0	47.83	0	\$247.95		
23	VULTURE,	XXX-XX-66	197.63	0	0	2.49	0	47.83	0	\$247.95		
24	WOODPE	XXX-XX-92	197.63	0	0	0	0	0	0	\$197.63		
25	TOTALS		*****	\$592.89	\$0.00	\$22.41	\$0.00	\$478.28	\$0.00	*****		
26	Page 1 of	1										
27												
28												
29												
30												
31												
		S3av	vs.s3_mnt_	v3_image_s	storag	Ð						: 🛛

If the report opens in a different browser tab, go back to the Employer Reports page by clicking on the original tab you were working in.

Notes:

- The report may take up to 30 minutes to process. We recommend requesting the report, then checking back in later for the report rather than waiting while it runs. If you are working on something else in MyTRS, the confirmation message will pop-up on the screen you are working in.
- The report will be available to you under Employer Reports until 9pm the same day.
- If we have an email address on file for your account, you will receive an email when the report has been successfully completed. This takes the guess work out of knowing when the report is ready!
- Reports can be run for any month/year going back to Oct 2013.
- Please remember that the GASB45 report is designed to be your OPEB information source and can be used to locate contact information for your retirees. The GASB45 will not always reflect the deductions taken for that period and should not be used to verify your check amount or actual deductions taken for the associated period. The Monthly Insurance Deduction Report is designed to meet that need.

Chapter 12—View Plan Rates

MyTRS allows employers to view retiree plan information and the corresponding monthly premium costs.

To review your rates:

1. Click Insurance Rates from the left navigation menu.

My RS	1 9007 - AVIARY PUBLIC SCHOOLS	Welcome Wadger with Court MyTES Account Setting Logost
Home Employer Information	I would like to	News
 Payroll Calendar Import History 	Generate Retiree Earnings Limit Calculator > Retiree Earnings Limit Calculator	ACCESS: > 01/02/2024
Deduction Reports	Import and process a Deduction Report File > Import and process a Deduction Report File	2.5 Consecurity business days each monit, employers and members use my rise access so we can process benefits. Periodically, on Friday evenings at 6pm, we takedown MyTRS without notice, please plan accordingly.
EFT & Payments Employee Roster Retiree Insurance	Register an Employee > Register an employee with your organization	ERROR reporting. Use this form to report any MyTRS technical issues you may experience. > 03/09/2023 ESS error reporting - MTRS (state malus)
Selections Insurance Deduction History	\$ Make a Payment > Make a one time payment	
Insurance Rates Employer Reports	Tiew Retiree Insurance Selections > Neview individual retiree insurance selections	
	Run a Report > Run Retiree Insurance Deduction History, Pending Enrollment Report, etc.	
	S MIRS Website > Site Pol	lizy > © Contact Us > © Vitech Systems Sub LLC 2021. All rights reserved.

2. The insurance plans and premiums will be displayed.

MTRS	9007 - AVIARY PUBLIC	schools			Welcome	Wadger	wa 🕣 count Settings Logout
☆ Home Employer Information	Insurance Premiu	ms			Add	Rates Edit Rates	
Payroll Calendar	Coverage Type	Insurance Carrier	Plan	Plan Coverage	Start Date	Stop Date 11	Premium
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	07/01/2020		944.38
Import History	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	07/01/2019		174.32
Deduction Reports	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	07/01/2022		47.83
S EFT & Payments	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual for 2	07/01/2022		95.64
. Employee Roster	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	07/01/2023		406.36
Retiree Insurance	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2023		330.74
Selections	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2023		886.33
History	Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/2023		2.49
Insurance Rates	Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2024		197.63
Employer Reports	Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	01/01/2024		395.24
Employer Reports	Second Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2024		197.63
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Survivor	01/01/2024		17.50
	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Survivor	01/01/2024		0.01
	Second Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2023	12/31/2023	189.96
	Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	01/01/2023	12/31/2023	379.92
	Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2023	12/31/2023	189.96
	Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/1998	06/30/2023	2.15
	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2022	06/30/2023	310.52
	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2022	06/30/2023	832.15
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	07/01/2022	06/30/2023	381.52

4

3. The plans grid can be sorted by any of the columns with the sort icon showing. Some fields cannot be used to sort in view mode but are available to sort by in edit mode. When sorted, you'll see the sort indicated by a filter bubble above the grid.

MJTRS .	3 9007 - AVIARY PUBLIC S	SCHOOLS			Welcome	Wadger	VR 🕣
▲ Home Employer Information	Insurance Premiu	ms		3	Add	Rates Edit Rates	€ 10 Export Fators
Payroll Calendar	Sort: Coverage Type (As	scending) 🔞					
1mport History	Coverage Type ≟↓	Insurance Carrier	Plan	Plan Coverage	Start Date	Stop Date 1	Premium
Deduction Reports	Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/1998	06/30/2023	2.15
	Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/2023		2.49
\$ EFT & Payments	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	04/01/2013	03/31/2017	95.12
📇 Employee Roster	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	04/01/2017	06/30/2019	171.44
Retiree Insurance	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	07/01/2019		174.32
 Selections Insurance Deduction 	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	04/01/2013	03/31/2017	47.57
⁴⁹ History	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	04/01/2017	06/30/2019	49.00
Insurance Rates	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	07/01/2019	06/30/2022	49.82
ili Employer Reports	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual for 2	04/01/2017	06/30/2019	97.97
	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual for 2	07/01/2019	06/30/2022	99.62
	Dental	NOT APPLICABLE	DENTAL LOW (DL)	Individual	07/01/2020	06/30/2022	29.23
	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	07/01/2022		47.83
	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual for 2	07/01/2022		95.64
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	07/01/2014	06/30/2017	785.43
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	07/01/2019	06/30/2020	919.64
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	07/01/2020		944.38
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	07/01/2017	06/30/2019	988.89
	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2011	06/30/2014	603.10
- Contraction	Medical	RULIE. OROSS, RULIE, SUIFLD.	HMO RULE (HR)	Family	07/01/2014	06/30/2015	641.60

4. Use the **Filters** button to filter or sort the list (e.g., by Coverage Type or Start Date).

Mgrs	9007 - AVIARY PUBLIC	SCHOOLS			Welcome	Wadger		WB count Settings	Đ Logou
A Home	Insurance Premiu	ms			Add	Rates Ec	dit Rates	Export	Fitters
 Employer Information Payroll Calendar 	Coverage Type	Insurance Carrier	Plan	Plan Coverage	Start Date	Stop D	ate 📑	P	

5. The view defaults to display ALL the plans you offer; however, you can choose a more refined list by using the Filters button to filter by Coverage Type (for example). Click Medical, then click Apply.

Welcome Wadger	5	WB count Settings	€ Logout
Filters	Apply	Reset	×
Filter by		Collapse	All
Coverage Type			^
Basic Life Dental Medical 5 Second Medical			
Plan			^
Q Search			
AETNA MEDICARE PLAN (A	MP)		_
AETNA MEDICARE PLAN (A	MP)		- 1
BASIC LIFE (2000)			
BLUE CROSS - BLUE SHIELD	D (BC)		- 1
DENTAL LOW (DL)			

6. MyTRS will now display your plans, as specified and show both filter bubbles indicating the filter and sorting options.

MTRS	9007 - AVIARY PUBLIC SCH	DOLS			Welcome Wa	lger Hyttes Ac	wa 🕣
♠ Home Employer Information	Insurance Premiums				Add Rate	es Edit Rates	t 12 Export Filters
营 Payroll Calendar	Filter: Coverage Type (Medical	Sort: Coverage Type (Ascending)	0				
1 Import History	Coverage Type ≟↓	Insurance Carrier	Plan	Plan Coverage	Start Date	Stop Date	Premium
Deduction Reports	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	07/01/2014	06/30/2017	785.43
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	07/01/2019	06/30/2020	919.64
\$ EFT & Payments	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	07/01/2020		944.38
🚉 Employee Roster	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	07/01/2017	06/30/2019	988.89
Retiree Insurance	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2011	06/30/2014	603.10
Selections Insurance Deduction	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2014	06/30/2015	641.60
⁴⁹ History	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2015	06/30/2016	711.54
Insurance Rates	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2019	06/30/2020	751.24
il. Employer Reports	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2020	06/30/2022	771.45
	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2016	06/30/2017	776.72
	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2017	06/30/2019	807.79
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	07/01/2013	06/30/2014	279.14
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	07/01/2014	06/30/2015	294.16
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	07/01/2015	06/30/2016	326.22
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	07/01/2019	06/30/2020	344.43
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	07/01/2020	06/30/2022	353.69
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	07/01/2016	06/30/2017	356.11
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	07/01/2017	06/30/2019	370.35
	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2013	06/30/2014	227.19

7. You may want to export your information to excel to sort and organize yourself before deciding what changes needed to be made. To export this information, click Export and the report automatically downloads to an Excel file.

Welcome Wadger		MyTRS Ac	} Logout		
Add Rates	Edit	Rates	Export	P Filters	Î

Note:

 This information can also be accessed by using the Employer Reports function. See Chapter 11 for more details.

Chapter 13—Add / Edit Plan Rates

Process Insurance Plan Rate Changes

Maintaining insurance plans and the plan prices was previously exclusively managed by the MTRS but this process can now be done directly in MyTRS. Employer users can add a row for any plan associated to their employer.

Please note: Associating new plans to an employer will still be managed by the MTRS indefinitely.

Creating new rate periods for a plan price change, requires users to add a new row at the new price level. Overwriting existing plans will result in the original deductions being refunded.

To add a new plan rate row, there is a two-step process:

- 1. Add the new rate row to the plan via the Add Rates function.
- 2. The row adds with a rate of \$ 0.01 so the new premium rate must be changed via the Edit Rates function.

Add Plan Rates

1. Select *Insurance Rates* from the left navigation menu.

	I would like to	News
loyer Information		
roll Calendar ort History	Generate Retiree Earnings Limit Calculator > Retiree Earnings Limit Calculator	ACCESS: > 01/02/202
uction Reports	Import a Deduction Report File > Import and process a Deduction Report File	2-3 consecutive business days each month, employers and members lose MyTRS access so we can process benefits. Periodically, on Friday evenings at 6pm, we takedown MyTRS without notice, please plan accordingly.
Payments oyee Roster	Register an Employee > Register an employee with your organization	ERROR reporting. Use this form to report any MyTRS technical issues you may experience. > 03/09/202 ESS error reporting - MTRS (state ma.us)
ree Insurance ctions rance Deduction ory	Make a Payment > Make a one time payment	
ance Rates oyer Reports	View Retiree Insurance Selections > Review individual retiree insurance selections	
	Run aReport > Run Retiree Insurance Deduction History, Pending Enrollment Report, etc.	

Note:

Each of the View Rates, Add Rates and Edit Rates has a distinctly configured filter function so depending on preference, users can filter for plans to add before going into the Add Rates feature or use the filtering in the Add Rates function to filter for selections. For these instructions, we've assumed you're filtering using in the Add Rates stage, for the View Rates filtering, see the View Rates section of these instructions.

2. Click Add Rates.

MTRS	9007 - AVIARY PUBLIC	SCHOOLS			Welcome	Wadger	wa 🔁 ccount Settings Logou
Home Employer Information	Insurance Premiu	ms			2 Add	Rates Edit Rates	Export Fibers
Payroll Calendar	Coverage Type	Insurance Carrier	Plan	Plan Coverage	Start Date	Stop Date	Premiur
Concernance of the second	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	07/01/2020		944.3
Import History	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	07/01/2019		174.3
Deduction Reports	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	07/01/2022		47.8
EFT & Payments	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual for 2	07/01/2022		95.
Employee Roster	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	07/01/2023		406.
Retiree Insurance	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2023		330.
Selections	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2023		886.
Insurance Deduction History	Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/2023		2.
nsurance Rates	Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2024		197.
molover Paparte	Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	01/01/2024		395.
Inproyer Reports	Second Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2024		197.
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Survivor	01/01/2024		17.
	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Survivor	01/01/2024		0.0
	Second Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2023	12/31/2023	189.
	Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	01/01/2023	12/31/2023	379.
	Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2023	12/31/2023	189.
	Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/1998	06/30/2023	2.
	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2022	06/30/2023	310.
	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2022	06/30/2023	832.
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	07/01/2022	06/30/2023	381.
\$	Modical	MEDEX HEALTH	TWO MEDEX'S (MY2)	Conior	01/01/2018	10/01/0000	205.4

- 3. Once the rates are viewable, you can locate the plan option you would like to add by either:
 - Sorting the column by clicking on the header
 - Migrating page by page using the arrows in the bottom right corner or,
 - Using the Edit Rates Filter where you can filter by typing in values.

Add Rates				3 Fitters ×
lease select	the Plan Coverage(s) an	d enter Start Date for the new Premiun	n Rates	
tart Date*				
Select	Coverage Type	Insurance Carrier	Plan 🔤	Plan Coverage
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual for
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family 2
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Survivor
	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual
	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family
	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Survivor
	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Senior
	Medical	MEDEX HEALTH	MEDEX (MX)	Individual
	Medical	MEDEX HEALTH	MEDEX (MX)	Survivor
	Medical	MEDEX HEALTH	MEDEX (MX)	Senior
	Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Individual
	Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Individual for 2
	Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior
1 - 15 of 37	* 44.4 P	. 3 - 400 - 100 - 100 - 100 - 1	3	ic C Page 1 of 3 > >1
				Cancel Done

4. In the example below, a filter has been applied to only show Aetna plans.

Now that the Aetna options are viewable, enter the Start Date for the new rate then check the select box next to the plan(s) that need a new rate added. When selecting plans to update, please make sure to only select the plans and coverage types (individual, family, senior, etc.) you currently need to avoid cluttering up your options with plans you don't use/need.

You may need to scroll through the pages if you need to add multiple types of plans. The check boxes remain checked as you scroll through the pages. I would recommend adding a few plans and prices at a time to avoid confusion and/or mistakes.

👔 InPrivate 🗖	🕒 MyTRS - Insurance	e Rates × +				- a x
< C A	https://mtrsp	reprod3ess.v3locity.com/home/d6		NJMwMTqh2Fzf1hPSSS82S8WO2dvNhU08hf88EImDLoaC7n69Xe	etw%3D%3D&billing_institution_A 🖄 🗇 🖽 🏠 🏟	
0 DOEdistrictprofiles	Employers - MTRS	- OurTRS 💿 SSTA - DW 🌱	LOB 📋 ESS 🔹 ESU on OurTRS 🍨 MTRS perf e	val 🌾 Servicedesk for IT 🌾 UMassD 🕒 ESS 🕒 MSS 🗮 S	harefile Login	C Other favorites
MJTR	\$1					ettings Logost
🔒 Home	Add Rates				T X Fitters	– j
Employer I	Please select t	the Plan Coverage(s) ar	d enter Start Date for the new Pren	nium Rates	Filters Apply	Reset X
🛱 Payroll Cal	Start Date*					Collapse All
🟦 Import His	Select	Coverage Type	Insurance Carrier	Plan 1	Filter by	
Deduction		Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Jelevi	
\$ EFT & Payr		Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Yes	
LS Employee		Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	No	
Retiree Ins		Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Coverage Type	^
Selections		Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Q Coverage Type	
O History		Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Plan	<u>.</u>
Insurance		Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	V Q Aetna	0
Employer P		Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Plan Coverage	~
-		Medical	MEDEX HEALTH	MEDEX (MX)	Q Plan Coverage	
		Medical	MEDEX HEALTH	MEDEX (MX)	Insurance Carrier	
		Medical	MEDEX HEALTH	MEDEX (MX)		
		Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	C Insurance carrier	
		Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Individual for 2	379.92
		Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	189.96
	1 - 15 of 37	24. E.F.		A MERICI D AND	I< < Page 1 of 3 > >I	2.15
					Cancel Done	832.15 381.52
N. N.	STAT.	Andreal A	IEDEY JEANTU TWO	MEDIFICS (MV2) Sonline	01/01/2018 12/21/2022	305.42

5. Click **Done** once the **Start Date** is entered and options are selected.

a -	Control of the Control of Control					MyTES Account
ormation	Insurance Premium	5			Add	Rates Edit Rates p
ıdar	Coverage Type	Insurance Carrier	Plan	Plan Coverage	Start Date	Stop Date
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	07/01/2020	
						10
Add Rates						Filters
Passabi Dina /A	Intral A					
Search, Plati (A	(cula)					
Please sele	ct the Plan Coverage(s	and enter Start Date for the nev	w Premium Rates			
Start Date*						
Start Date* 01/01/2024						× 🖬
Start Date* 01/01/2024 Select	Coverage Type 1	Insurance Carrier	Plan E I		Plan Covera	× 🖬
Start Date* 01/01/2024 Select	Coverage Type = 1 Medical	Insurance Carrier	Plan ∃ I AETNA MEDICARE PL	AN (AMP)	Plan Covera Survivor	× (=
Start Date* 01/01/2024 Select	Coverage Type E I Medical Medical	Insurance Carrier	Plan ∃ I AETNA MEDICARE PL AETNA MEDICARE PL	AN (AMP) AN (AMP)	Plan Covera Survivor Senior	× 🖬
Start Date* 01/01/2024 Select =	Coverage Type = 1 Medical Medical Second Medical	Insurance Carrier	Plan EI AETNA MEDICARE PL AETNA MEDICARE PL AETNA MEDICARE PL	an (amp) an (amp) an (amp)	Plan Covera Survivor Senior Senior	× 🖬
Start Date* 01/01/2024 Select =	Coverage Type I Medical Medical Second Medical	Insurance Carrier = 1 AETNA AETNA AETNA	Plan È I AETNA MEDICARE PL AETNA MEDICARE PL AETNA MEDICARE PL	AN (AMP) AN (AMP) AN (AMP)	Plan Covera Survivor Senior Senior	× 🕫
Start Date* 01/01/2024 Select =	Coverage Type EI Medical Medical Second Medical	Insurance Carrier	Plan È I AETNA MEDICARE PL AETNA MEDICARE PL AETNA MEDICARE PL	AN (AMP) AN (AMP) AN (AMP)	Plan Covera Survivor Senior Senior	x T nge = I Cancel Done
Start Date* 01/01/2024 Select	Coverage Type I Medical Medical Second Medical	Insurance Carrier E	Plan È I AETNA MEDICARE PL AETNA MEDICARE PL AETNA MEDICARE PL	AN (AMP) AN (AMP) AN (AMP) Senior	Plan Covera Survivor Senior Senior	× C age ± I Cancel Done 12/31/2023
Start Date* 01/01/2024 Select =	Coverage Type I Medical Medical Second Medical Medical Medical	Insurance Carrier E	Plan EI AETNA MEDICARE PL AETNA MEDICARE PL AETNA MEDICARE PL TWO MEDEX S (MX2) MEDEX (MX)	AN (AMP) AN (AMP) AN (AMP) Senior Senior	Plan Covera Survivor Senior Senior 01/01/2023 01/01/2023	× C age ± 1 5 Cancel Done 12/31/2023 12/31/2023
Start Date* 01/01/2024 Select =	Coverage Type I Medical Medical Second Medical Medical Medical Basic Life	Insurance Carrier	Plan EI AETNA MEDICARE PL AETNA MEDICARE PL AETNA MEDICARE PL TWO MEDEXS (MX2) MEDEX (MX) BASIC LIFE (2000)	AN (AMP) AN (AMP) AN (AMP) Senior Senior Senior Individual	Plan Covera Survivor Senior Senior 01/01/2023 01/01/2023 07/01/1998	× T age = 1 5 Cancel Done 12/31/2023 12/31/2023 06/30/2023
Start Date* 01/01/2024 Select	Coverage Type I Medical Medical Second Medical Medical Basic Life Medical	Insurance Carrier	Plan ±1 AETNA MEDICARE PL AETNA MEDICARE PL AETNA MEDICARE PL TWO MEDEXS (MX2) MEDEX (MX) BASIC LIFE (2000) HMO BLUE (HB)	AN (AMP) AN (AMP) AN (AMP) Senior Senior Individual Individual	Plan Covera Survivor Senior Senior 01/01/2023 01/01/2023 07/01/1998 07/01/2022	× To age = 1 Cancel Done 12/31/2023 12/31/2023 06/30/2023 06/30/2023
Start Date* 01/01/2024 Select ::	Coverage Type I Medical Medical Second Medical Medical Basic Life Medical Medical Medical	Insurance Carrier	Plan 1 AETNA MEDICARE PL AETNA MEDICARE PL AETNA MEDICARE PL AETNA MEDICARE PL IWO MEDEXS (MX2) MEDEX (MX) BASIC LIFE (2000) HMO BLUE (HB) HMO BLUE (HB)	AN (AMP) AN (AMP) AN (AMP) Senior Senior Individual Individual Individual Family.	Plan Covera Survivor Senior Senior 01/01/2023 01/01/2023 07/01/1998 07/01/2022	× To age 1 Cancel Done 12/31/2023 12/31/2023 06/30/2023 06/30/2023

Note:

Failing to enter a start date will trigger the following error and any date entered that is not the first if the month will be corrected to the first day of the month and year entered as coverage can only be entered as full-month coverage.



This message will be displayed if the plan has been successfully added.

MJTRS	19007 - AVIAR	S Please click on Edit Rates button to enter Premium Amounts for the rows added with new Effective Start Date.	×	Welcome Wadger		WB count Settings	
A Home ■ Employer Information	Insurance Premiums			Add Rates 1	Edit Rates	≜ Export	Filters

Important!

You'll see that all of the plans that you added will be added with a premium of \$0.01 and the stop dates for the previous periods will have a stop date of one day before the new plan price start date. Please proceed to the next section on editing rates to add the proper price to your plan rates.

Mg RS/	3 9007 - AVIARY PUBLIC S	SCHOOLS			Welcome V	Wadger MyTRS	WB 🕣
🛧 Home	Insurance Premiu	ms			Add R	tates Edit Rates	± ▼ Export Filters
Pavroll Calendar	Coverage Type	Insurance Carrier	Plan	Plan Coverage	Start Date	Stop Date	Premium
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	07/01/2020		944.38
Import History	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	07/01/2019		174.32
Deduction Reports	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	07/01/2022		47.83
\$ EFT & Payments	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual for 2	07/01/2022		95.64
St. Employee Roster	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	07/01/2023		406.36
Retiree Insurance	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2023		330.74
+ Selections	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2023		886.33
9 History	Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/2023		2.49
Insurance Rates	Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2024		197.63
Employer Reports	Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	01/01/2024		395.24
Employer Reports	Second Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2024		197.63
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Survivor	01/01/2024		17.50
	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Survivor	01/01/2024		0.01
	Second Medical	AETNA	AETNA MEDICARE PLAN (AMP)	Senior	01/01/2024		0.01
	Medical	AETNA	AETNA MEDICARE PLAN (AMP)	Senior	01/01/2024		0.01
	Second Medical	TUFTS HEALTH	TUFTS (T)	Senior	12/01/2024		0.01
	Medical	TUFTS HEALTH	TUFTS (T)	Senior	01/01/2024		0.01
	Second Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2023	12/31/2023	189.96
	Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	01/01/2023	12/31/2023	379.92
	Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2023	12/31/2023	189.96
	Rapic Life	BASICLIES	PASIC LIEE (2000)	Individual	07/01/1009	06/20/2022	2.15

Edit Plan Rates

The Edit Plan Rates function in MyTRS allows employer users to change or correct the price of health plan. IF you are looking to change the rate for a plan effective for a new period, you MUST add a new row using the Add Plans instructions. DO NOT change the existing rate or your rate change will be retroactive. If you change the start date to a row that correctly had deductions, MyTRS will refund the associated deductions. If this is unclear, please contact us at insuranceupdates@trb.state.ma.us BEFORE you make any changes.

1. From the Insurance Rates screen, Click Edit Rates.

MyRS	B 9007 - AVIARY PUBLIC:	SCHOOLS	Welcome	Wadger	WB C			
🔒 Home	Insurance Premiu	ms			Add	Rates Edit Rates	± 1	r
Employer Information							Export Filte	071
Payroll Calendar	Coverage Type	Insurance Carrier	Plan	Plan Coverage	Start Date	Stop Date	Prem	nium
Inspect Lifetane	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	07/01/2020		944	4.38
Import History	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	07/01/2019		174	4.32
Deduction Reports	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	07/01/2022		43	7.83
EFT & Payments	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual for 2	07/01/2022		95	5.64
Employee Roster	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	07/01/2023		406	6.36
Retiree Insurance	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2023		330	0.74
Selections	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2023		886	6.33
Insurance Deduction History	Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/2023		4	2.49
] Insurance Rates	Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2024		197	7.63
Employer Perorte	Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	01/01/2024		395	5.24
Comproyer Neporta	Second Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2024		197	7.63
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Survivor	01/01/2024		17	7.50
	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Survivor	01/01/2024		(0.01
	Second Medical	AETNA	AETNA MEDICARE PLAN (AMP)	Senior	01/01/2024		(0.01
	Medical	AETNA	AETNA MEDICARE PLAN (AMP)	Senior	01/01/2024		(0.01
	Second Medical	TUFTS HEALTH	TUFTS (T)	Senior	12/01/2024		(0.01
	Medical	TUFTS HEALTH	TUFTS (T)	Senior	01/01/2024		(0.01
	Second Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2023	12/31/2023	189	9.96
	Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	01/01/2023	12/31/2023	379	9.92
	Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2023	12/31/2023	189	9.96
	Daala Life	PARIO LIEF	DAGIO JEE (2000)	In all of all on T	07/01/10000	0.0000000		

2. Depending on why you are editing rates, you may want to filter or sort the plans shown to locate the rate you want to edit. Unlike the View Rates Screen, every column in Edit Rates can be sorted by clicking on the header.

For our example, we'll be adding prices for the plans added in the Add Plans section of these instructions. To target all of the plans we just added, we're going to sort the screen by the premium value so all plans with a price of \$0.01 are listed first. If you prefer a different filtering or sorting method, each will work.

							- Pilles	
Sort: Premium (Ascend	ling) 😣							
Coverage Type	Insurance Carrier	Plan 11	Plan Coverage	Start Date	Stop Date		Pren	nium 1.
Second Medical	TUFTS HEALTH	TUFTS (T)	Senior	12/01/2024	3	1		\$0.0
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Survivor	01/01/2024				\$0.0
Second Medical	AETNA	AETNA MEDICARE PLAN (AMP)	Senior	01/01/2024		D		\$0.0
Medical	AETNA	AETNA MEDICARE PLAN (AMP)	Senior	01/01/2024		<u> </u>		\$0.0
Medical	TUFTS HEALTH	TUFTS (T)	Senior	01/01/2024		ti 🗌		\$0.0
Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/1998	06/30/2023			\$2.1
Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/2023				\$2.4
Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Survivor	01/01/2024				\$17.5
Dental	NOT APPLICABLE	DENTAL LOW (DL)	Individual	07/01/2020	06/30/2022			\$29.2
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	04/01/2013	03/31/2017	1		\$47.5
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	07/01/2022		Ċ0		\$47.8
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	04/01/2017	06/30/2019	1		\$49.0
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	07/01/2019	06/30/2022			\$49.8
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	04/01/2013	03/31/2017	D		\$95.1
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual for 2	07/01/2022		<u> </u>		\$95.6
1 - 15 of 76					I¢	< Page	1 of 6 >	ы

3. To add the price to our newly created plans, simply click on their premium field and key in the correct price.

MTRS						Walesens Washes	. I Pina	Ð
Edit Rates							Y ^O ×	T
mployer I Sort: Premium (As	cending) 😵							et Filtaca
vroll Cal Coverage Type	Insurance Carrier	Plan 1	Plan Coverage	Start Date	Stop Date		Premium ≟↓	944.38
Second Medical	TUFTS HEALTH	TUFTS (T)	Senior	12/01/2024			\$97.45	174.32
tion	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Survivor	01/01/2024		3	\$0.01	47,83
Second Medical	AETNA	AETNA MEDICARE PLAN (AMP)	Senior	01/01/2024		ii	\$89.99	95.64
Medical	AETNA	AETNA MEDICARE PLAN (AMP)	Senior	01/01/2024	5		\$89.99	406.36
Medical	TUFTS HEALTH	TUFTS (T)	Senior	01/01/2024		D	\$97.45	330,74
Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/1998	06/30/2023		\$2.15	886.33
Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/2023			\$2.49	2.49
Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Survivor	01/01/2024			\$17.50	197.63
Dental	NOT APPLICABLE	DENTAL LOW (DL)	Individual	07/01/2020	06/30/2022		\$29.23	395.24
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	04/01/2013	03/31/2017		\$47.57	197.63
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	07/01/2022			\$47.83	17.50
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	04/01/2017	06/30/2019		\$49.00	0.01
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	07/01/2019	06/30/2022		\$49.82	0.01
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	04/01/2013	03/31/2017		\$95.12	0.81

- 4. Click **Apply** to save the changes made. You can click **Save** if you have completed all the rate changes.
- 5. To update other plan rates, filter or sort accordingly and follow the instructions to make your changes.
- 6. Click **Save** when you have completed all the updates.
- 7. The new rates are now set for each plan effective on the Coverage Start Date entered.

My RS	9007 - AVIARY PUBLIC S	CHOOLS			Welcome Wadger wa 5 MyTRS Account Settings Logo				
 Home Employer Information 	Insurance Premiur	ns	Add Rates Edit Rates 🔮 🝸						
Payroll Calendar	Coverage Type	Insurance Carrier	Plan	Plan Coverage	Start Date	Stop Date	Premium		
· · · · · · · · · · · · · · · · · · ·	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	07/01/2020		944.38		
Import History	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	07/01/2019		174.32		
Deduction Reports	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	07/01/2022		47.83		
\$ EFT & Payments	Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual for 2	07/01/2022		95.64		
S Employee Roster	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	07/01/2023		406.36		
Retiree Insurance	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2023		330.74		
+ Selections	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2023		886.33		
O History	Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/2023		2.49		
Insurance Rates	Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2024	7	197.63		
Employer Reports	Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	01/01/2024		395.24		
in chipioyer reports	Second Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2024		197.63		
	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Survivor	01/01/2024		17.50		
	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Survivor	01/01/2024		660.00		
	Second Medical	AETNA	AETNA MEDICARE PLAN (AMP)	Senior	01/01/2024		89.99		
	Medical	AETNA	AETNA MEDICARE PLAN (AMP)	Senior	01/01/2024		89.99		
	Second Medical	TUFTS HEALTH	TUFTS (T)	Senior	12/01/2024		97.45		
	Medical	TUFTS HEALTH	TUFTS (T)	Senior	01/01/2024		97.45		
	Second Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2023	12/31/2023	189.96		
	Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	01/01/2023	12/31/2023	379.92		
	Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2023	12/31/2023	189.96		
	RacioLifo	RASIC LIFE	RASIC LIFE (2000)	Individual	07/01/1008	06/30/2022	2.15		

Notes:

- When global plan rate changes are completed by an employer in MyTRS, an overnight batch process is triggered at the MTRS that:
 - Identifies that employer's retirees or survivors with that plan coverage,
 - Enters a Stop Date on the existing rate event for each retiree, and
 - Creates a new coverage event at the updated cost for each retiree, effective for the date specified when setting up the new 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.

Chapter 14—Premium Rate Holidays

If your town offers premium rate holidays, you will need to process them directly in MyTRS.

There are typically three types of rate holidays implemented by employers. Below are the options available in MyTRS to accommodate those three types of rate holidays.

1. Every enrollee skips payment for a month (plan-price method):

If you offer a full rate holiday (no premiums paid for a month), you can enter that plan at the cost of one penny for the month. You cannot enter a plan at the cost of \$0.00.

To process this type of rate holiday:

- a. Add a price change for that plan—leave the premium rate = ".01" for the month of the rate holiday. The system does not allow the rate to be set to \$0 without cancelling the plan entirely. (See Chapter 13 for instructions on how to Add & Edit Rates).
- b. The next day, select the plans which you previously set to ".01"—on this new entry you will set the rate back to the full premium amount with a start date of the 1st of the next month (see Chapter 13 for instructions on how to Add & Edit Rates).
- This results in three entries for the same plan:
 - Original entry at the full premium rate.
 - An entry with the rate = .01 for the month of the rate holiday.
 - Final entry back at the full premium rate.

2. Plan price reduction:

If you offer a partial or discounted rate holiday (partial premium paid for a month), you can enter that plan at a reduced rate for the month.

To process this type of rate holiday:

- a. Add a price change for that plan at the lower rate (See Chapter 13 for instructions on how to Add & Edit Rates).
- b. The next day, add another price change for that same plan—on this entry you will set the rate back to the full premium amount (see Chapter 13 for instructions on how to Add & Edit Rates).
- This results in three entries for the same plan:
 - Original entry at the full premium rate.
 - An entry with the reduced rate for the month of the rate holiday.
 - Final entry back at the full premium rate.

3. Per retiree rate holidays:

If you offer a full rate holiday and setting the plan to one penny will not suffice or if your holiday doesn't apply to all enrollees, you can implement your rate holiday manually per retiree by stopping deductions on their current row then adding a new row to restart deductions.

- a. Go to the retiree's Insurance Maintenance screen.
- b. Initiate a Cancel Enrollment, add a Coverage Stop Date to the retiree's coverage so no deductions will be taken for the month of the premium holiday. (See Chapter 9 for instructions on how to cancel enrollments.)
- c. Initiate a Change Enrollment, add a new row (re-select existing plan) with a Coverage Start Date one month (or more) after the Coverage Stop Date of the previous row to resume deductions. (See Chapter 5 for instructions on how to change enrollments.)
- This results in the retiree having two entries for the same plan:
 - Original entry at the full premium rate.
 - Second entry at the full premium rate with a new Coverage Start Date a month (or more) later than the Coverage Stop Date of the previous entry. See below for an example of a member with a holiday for the period of December 2023.

In the example below, the coverage stop date of 11/30/2023, and coverage restart date of 01/01/2024 represents no charge for the December 2023 coverage period.

MJRS	1 9007 - AVIARY PUBL	IC SCHOOLS					Welco	me Wadger	wis 🕀 count Settlings Logout	
A Home	Member Insura	nce Maintenance						Add/Change Coverage	± •	
Employer Information									Export Filters	£C.
🛱 Payroll Calendar	Search: vulture									
Import History	SSN	Member Number	Member Name	Coverage Type	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premium Amou	unt
	XXX-XX-6637 >	94669	Vulture, Vicky	Medical	MEDEX (MX)	Senior	01/01/2024		\$197.6	.63
Deduction Reports	XXX-XX-6637 >	94669	Vulture, Vicky	Basic Life	BASIC LIFE (2000)	Individual	07/01/2023		\$2.4	49
\$ EFT & Payments	XXX-XX-6637 >	94669	Vulture, Vicky	Medical	MEDEX (MX)	Senior	01/01/2023	11/30/2023	\$189.0	96
	<u>XXX-XX-6637</u> >	94669	Vulture, Vicky	Dental	NOT APPLICABLE (NA)	Individual	07/01/2022		\$47.0	.83
Retiree Insurance	XXX-XX-6637 >	94669	Vulture, Vicky	Medical	MEDEX (MX)	Senior	01/01/2022	12/31/2022	\$199.0	96
Selections	XXX-XX-6637 >	94669	Vulture, Vicky	Dental	NOT APPLICABLE (NA)	Individual	07/01/2019	06/30/2022	\$47.1	.83
Insurance Deduction History	XXX-XX-6637 >	94669	Vulture, Vicky	Medical	MEDEX (MX)	Senior	01/01/2018	12/31/2021	\$197.	.71
Insurance Rates	<u>XXX-XX-6637</u> >	94669	Vulture, Vicky	Dental	NOT APPLICABLE (NA)	Individual	04/01/2017	06/30/2019	\$49.0	.00
Employer Paparte	XXX-XX-6637 >	94669	Vulture, Vicky	Medical	MEDEX (MX)	Senior	01/01/2017	12/31/2017	\$194.9	94
in Employer Reports	<u>XXX-XX-6637</u> >	94669	Vulture, Vicky	Medical	MEDEX (MX)	Senior	01/01/2016	12/31/2016	\$175.5	.20
	<u>XXX-XX-6637</u> >	94669	Vulture, Vicky	Medical	MEDEX (MX)	Senior	01/01/2015	12/31/2015	\$166.5	57
	XXX-XX-6637 >	94669	Vulture, Vicky	Medical	MEDEX (MX)	Senior	07/01/2014	12/31/2014	\$160.	.70
	XXX-XX-6637 >	94669	Vulture, Vicky	Medical	MEDEX (MX)	Senior	07/01/2013	06/30/2014	\$274.0	.80
	XXX-XX-6637 >	94669	Vulture, Vicky	Dental	NOT APPLICABLE (NA)	Individual	04/01/2013	03/31/2017	\$47.5	.57
	XXX-XX-6637 >	94669	Vulture, Vicky	Basic Life	BASIC LIFE (2000)	Individual	08/01/2000	06/30/2023	\$2.	.15
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If you have any questions, please contact us at insuranceupdates@trb.state.ma.us.