

Retiree Insurance in MyTRS

MTRS Employer Training Guide

MTRS
MASSACHUSETTS TEACHERS'
RETIREMENT SYSTEM
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.)

Retiree Insurance in MyTRS

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Chapter 1—Log in / Navigation / Employer Information

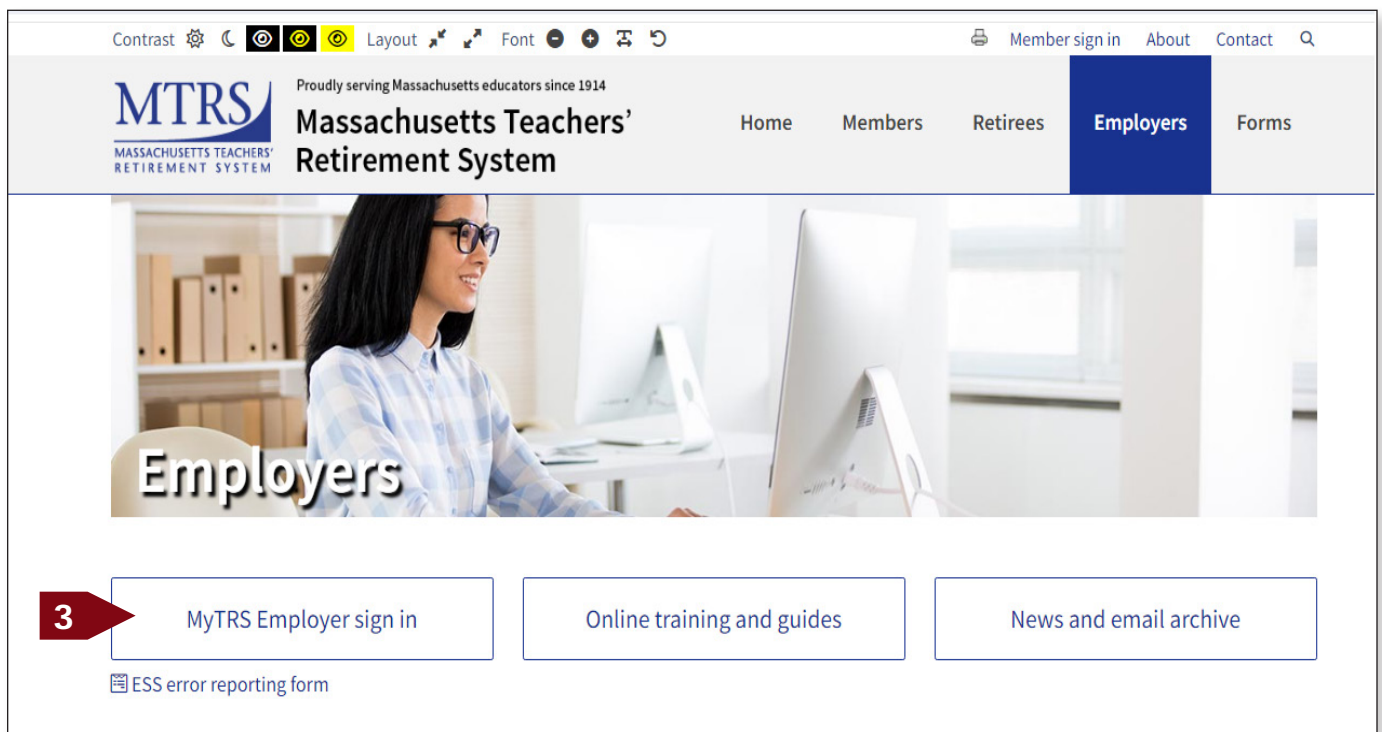
Log in to MyTRS

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

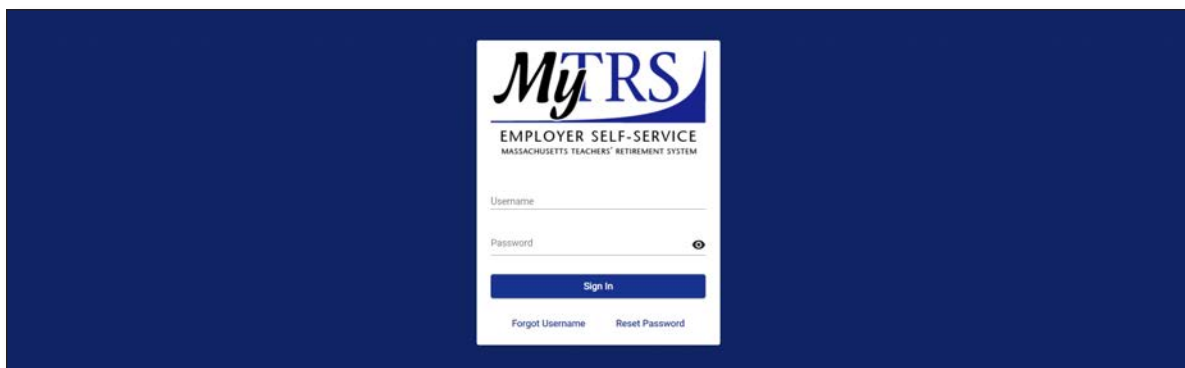


Suggestion: If not saved already, we recommend saving this page as a favorite in your browser's favorite bar.

3. Click **MyTRS Employer sign in**.



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



- 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**.

The screenshot shows the 'Two Factor Authentication' interface. At the top, there's a progress bar with two steps: '1 Choose Delivery Method' (active) and '2 Enter Verification Code'. Below the progress bar, the text says 'Please select a delivery method to receive a verification code'. Under 'Delivery Method', there are five radio button options: 'Email - By*****@Schools.Aviary.ma.us' (selected), 'Text - (***).***-1212', 'Voice - (***).***-1212', 'Text - (***).***-6869', and 'Voice - (***).***-6869'. At the bottom left is a 'Cancel' button, and at the bottom right is a 'Next' button. A red arrow with the number '5' points to the 'Next' button.

- MyTRS will send a message as shown.

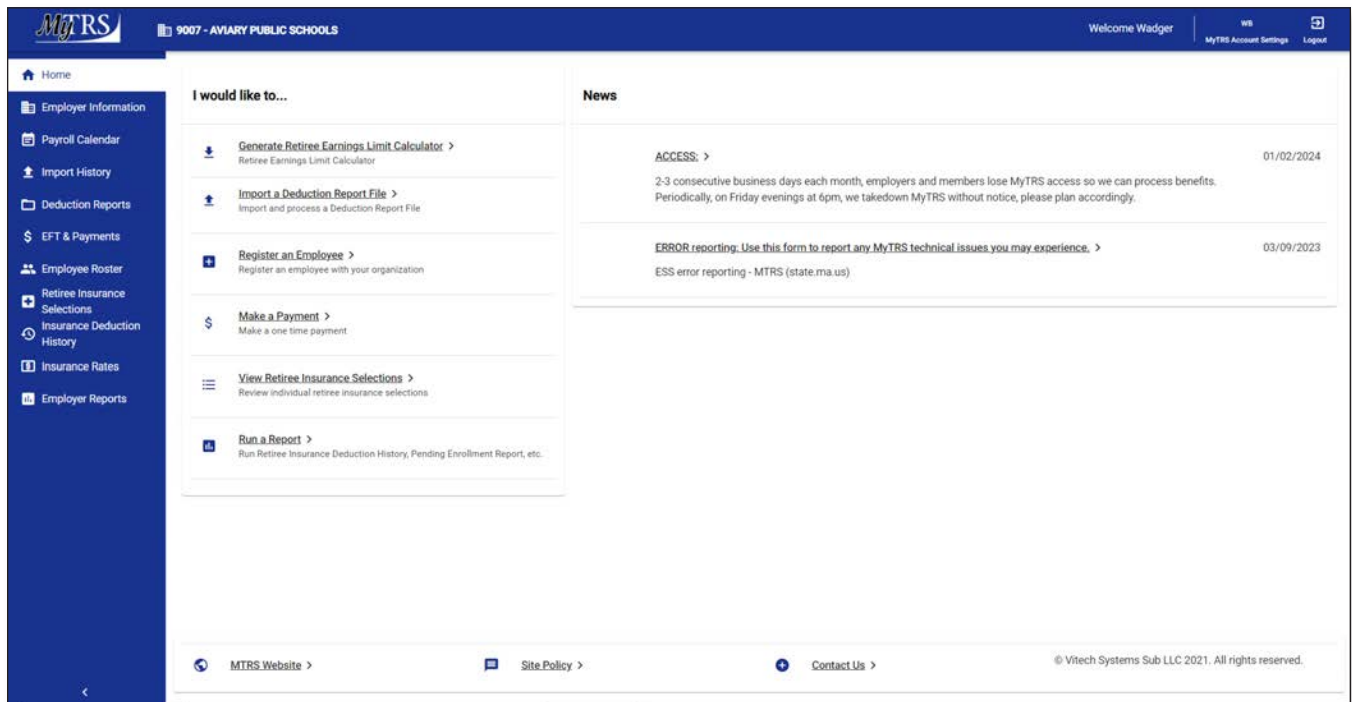
The screenshot shows an email message. The header says 'March 8, 2024' and 'Dear Wadger Byrd,'. The body text reads: 'Your requested MyTRS verification code is: **168495**. The verification code will expire in **15 minutes**. This email is system-generated, please do not reply directly. If you did not request a verification code for MyTRS, contact us by phone at 617-679-6877.'

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

The screenshot shows the 'Two Factor Authentication' interface at Step 2: 'Enter Verification Code'. The progress bar now shows Step 1 as complete with a checkmark and Step 2 as active. Below the progress bar, the text says 'A verification code has been sent to the selected delivery method which will be valid for 15 minutes. Please enter the code below.' There is a text input field labeled 'Verification Code' containing the text '168'. Below the input field is a 'Resend Code' link. At the bottom left is a 'Cancel' button, and at the bottom right are 'Previous' and 'Confirm' buttons. A red arrow with the number '7' points to the 'Confirm' button.

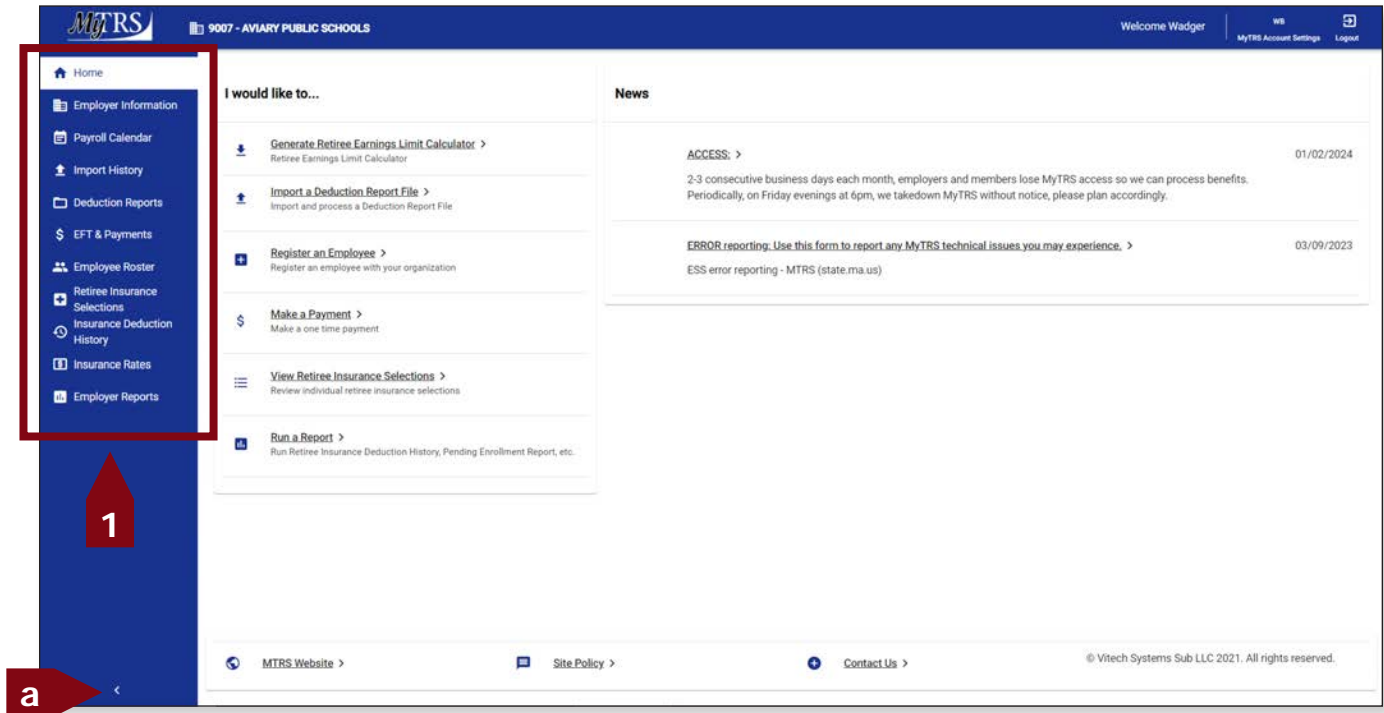
If you are copying and pasting the code from the email you received, double click on the code to highlight it before copying it (if you manually highlight it, an extra space will be included with the code when you paste it in MyTRS and will prevent you from logging in).

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.

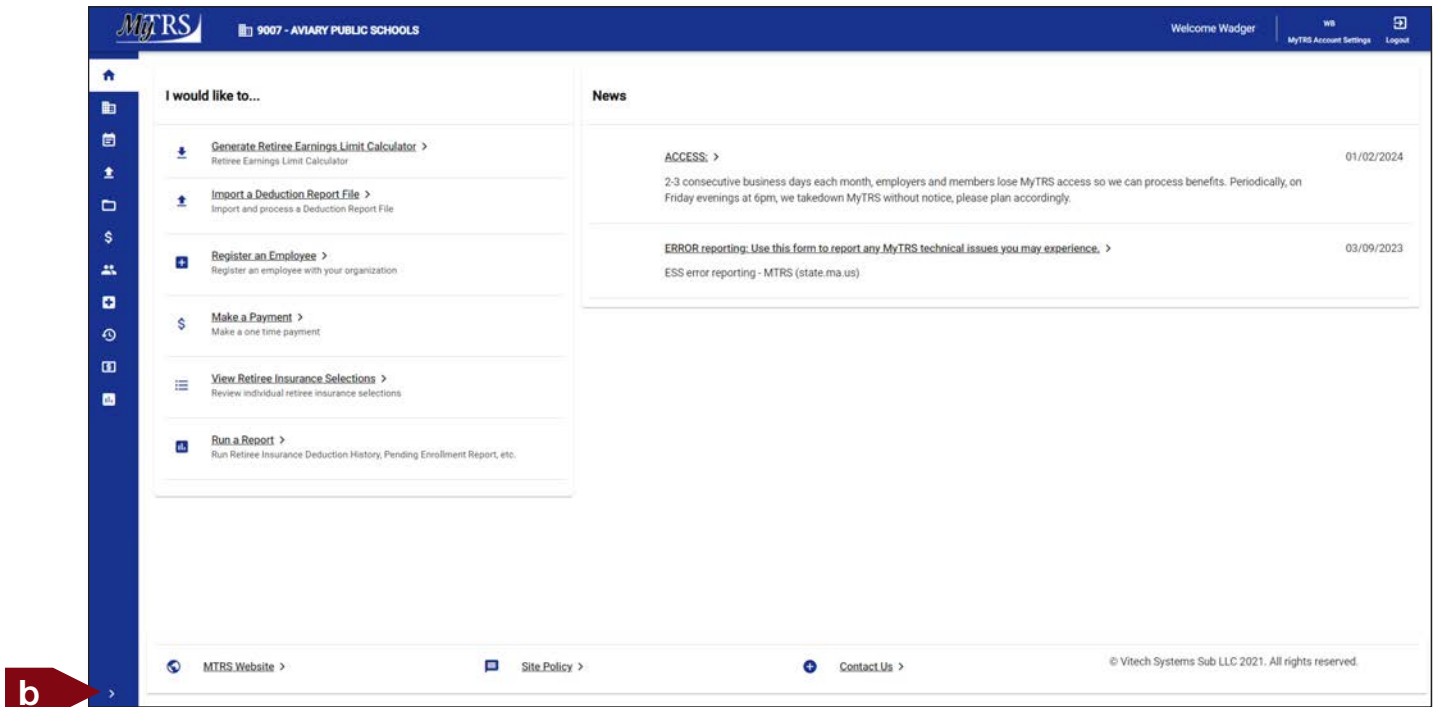


Home Page Navigation

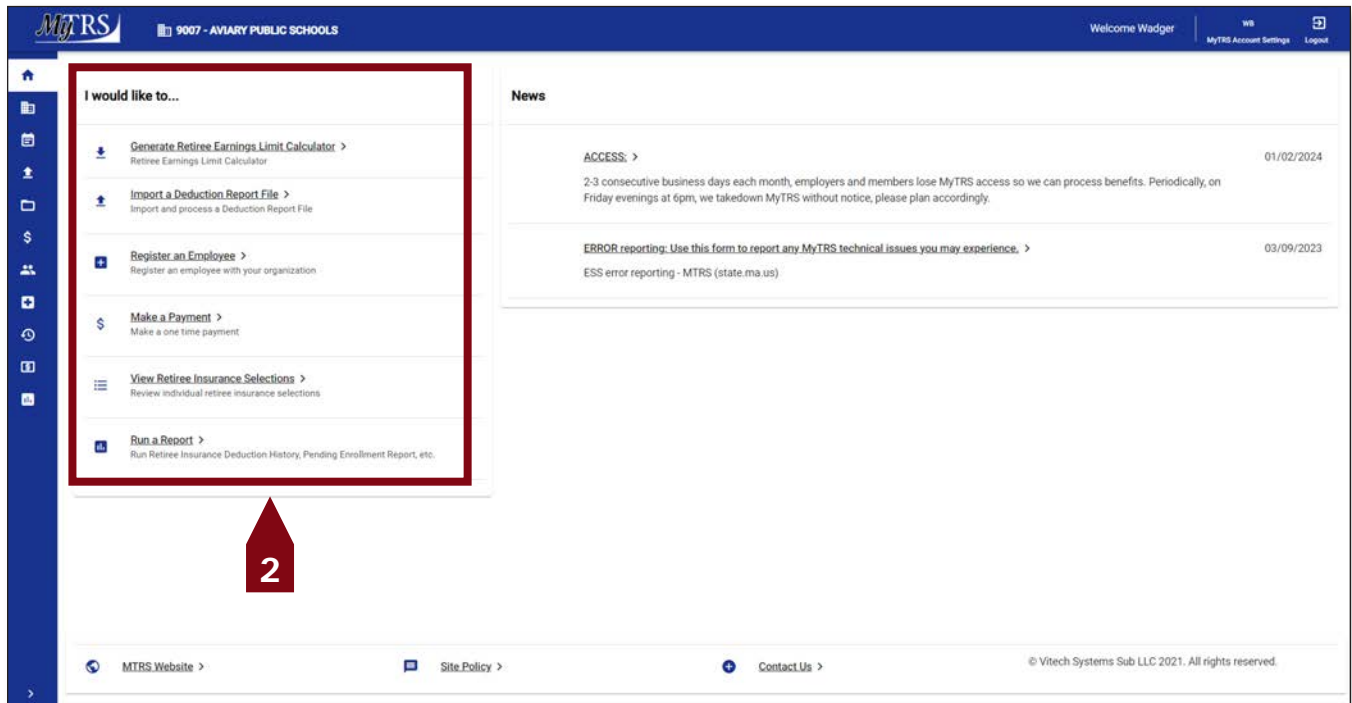
1. **Left navigation menu**—This menu has links that take you to the main pages. From these links you can access additional related links.



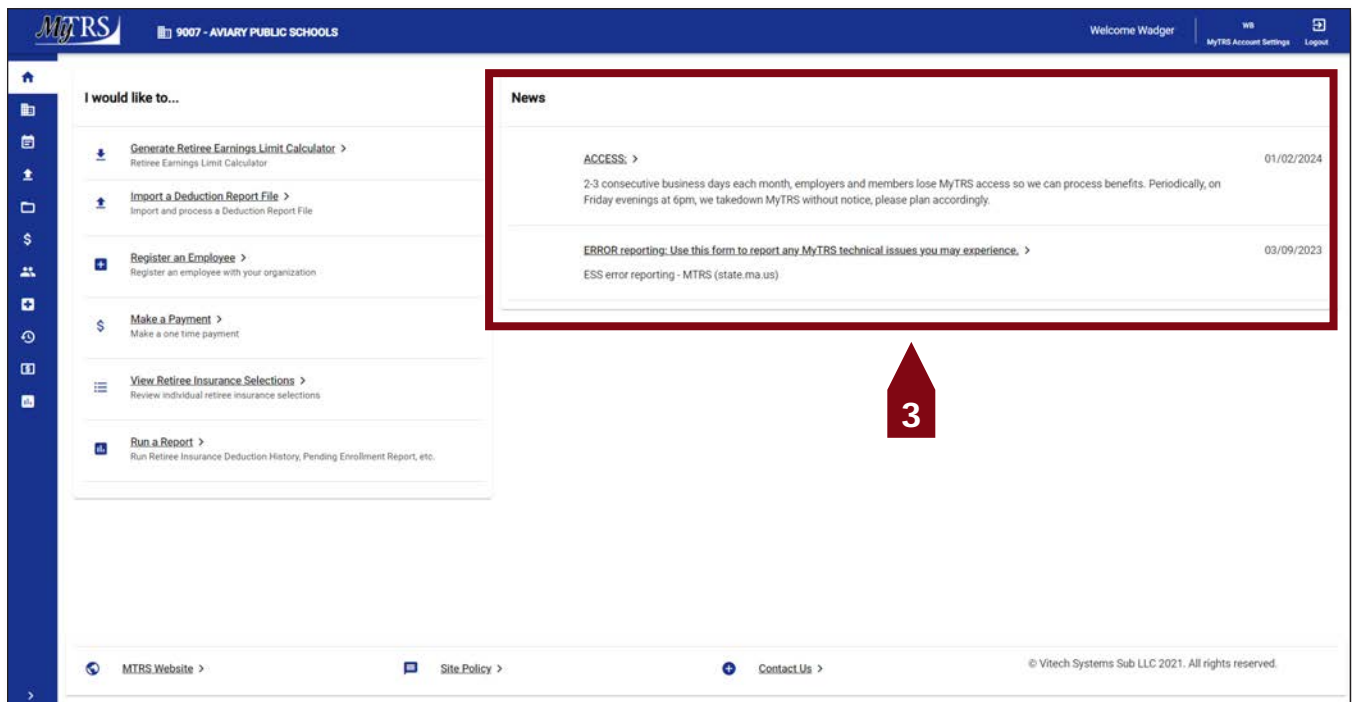
- This menu can be minimized by clicking the < at the bottom of the menu.
- To expand the menu again, click > at the bottom of the menu.



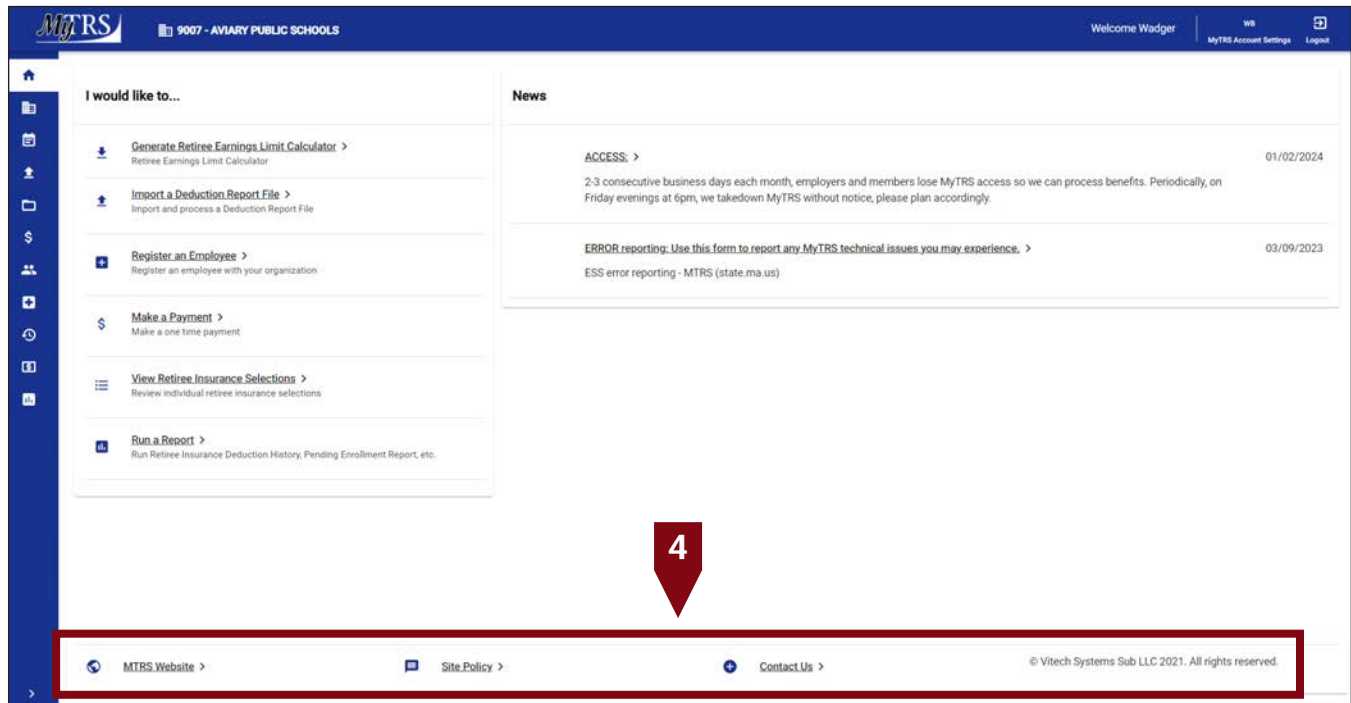
2. *I would like to...* menu—This quick links menu takes you to some of the most frequently accessed pages within MyTRS.



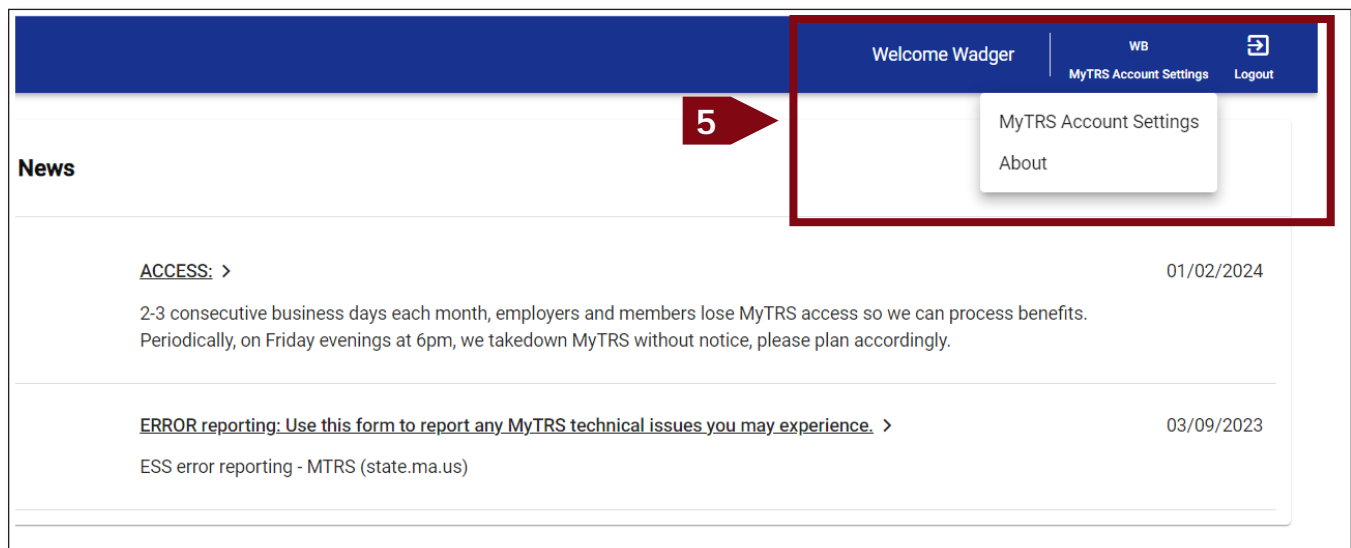
3. **News section**—In this section, you will find updates and news about system down time on warrant days. Be sure to check this section when you login to stay informed of any relevant announcements.



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.



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

The screenshot displays the 'MyTRS Account Settings' page. At the top, there is a blue header with the MyTRS logo, the text '9007 - AVIARY PUBLIC SCHOOLS', and a welcome message 'Welcome Wadger' with a user icon and 'MyTRS Account Settings' link. Below the header, a message states: 'To change your password, security questions and answers, and/or e-mail address, click the appropriate button below. Then, enter the required information in the pop-up. Click Save after making all your changes to update your account settings.' The main content area is titled 'MyTRS Account Settings' and includes three links: 'Reset Password', 'Reset Security Questions', and 'Reset Email'. On the left, there is a circular profile picture with the initials 'WB'. To the right of the picture, the following information is listed: 'User Name: WBYRD1234', 'User Full Name: Byrd, Wadger', 'Email: Byrd.Wadger@Schools.Aviary.ma.us', 'Last Login: 03/07/2024 8:59:29 AM', and 'Language Preference: English'. An 'Edit' button is located below the profile picture.

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

The screenshot displays the MyTRS Employer Information page for 9007 - AVIARY PUBLIC SCHOOLS. The page is divided into several sections:

- Employer Info:**
 - Employer Code and Name: 9007 • AVIARY PUBLIC SCHOOLS
 - Employer Type: Municipal
 - Federal Tax No:
- Address Information:**
 - Permanent: 123 High Cliff Rd, HYDE PARK, MA 02136
- Contact Info:**
 - Work Phone - (Primary): US • (999) 999-9999
 - No Email Address on file
- Additional Information:**
 - GlC Number: GlC Participant ☐
 - Website Address: ☐
 - MTRS Representative: Robert George
 - Correspondence By: ☐
- Contacts:**
 - Name: Byrd_Wadger >
 - Contact Role: Retiree Insurance Coordinator

The footer includes links to MTRS Website, Site Policy, and Contact Us, along with a copyright notice: © Vitech Systems Sub LLC 2021. All rights reserved.

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.

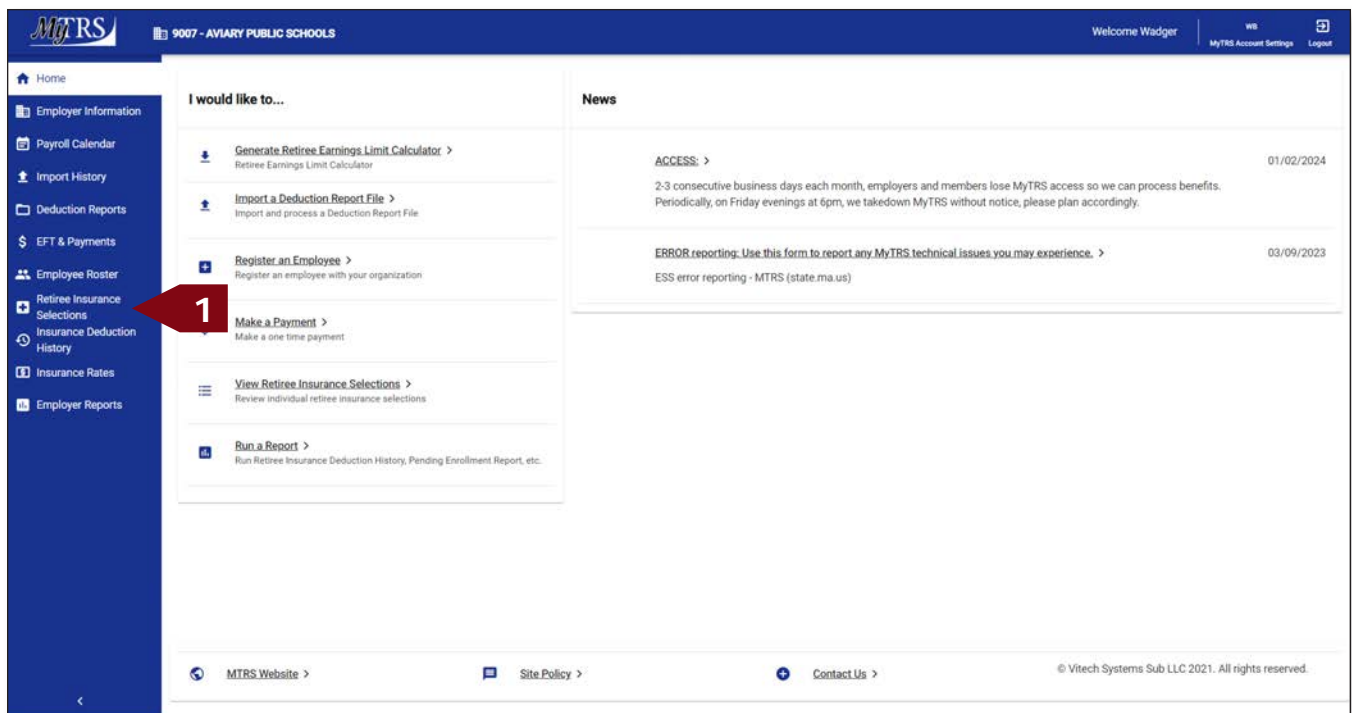
Chapter 4—Initial Enrollments

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.

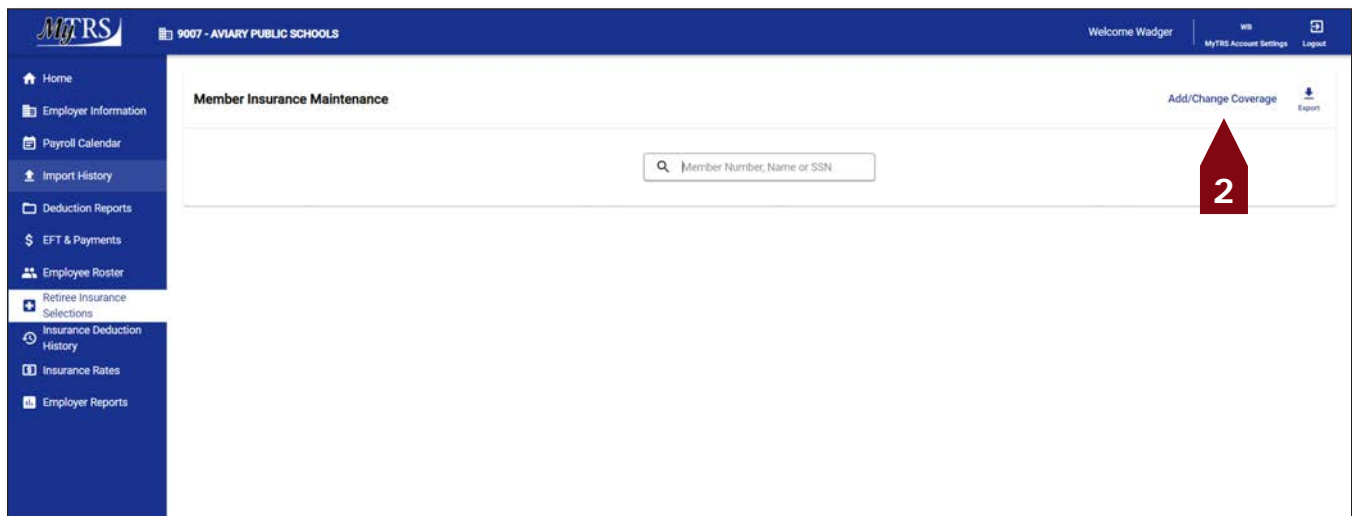
Initial Enrollment

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.



2. Click **Add / Change Coverage**.



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.

Retiree Enrollment

1 Select Member 2 Select Event 3 Select Coverages 4 Coverage Details 5 Review & Confirm

Please select the member that this enrollment is for

Q Dove, Deb 3 Search

Member Name	SSN	Member Number	Status
<input checked="" type="radio"/> ALBATROSS, AMY	XXX-XX-4579	192667	Retired
<input type="radio"/> ANHINGA, ALICE	XXX-XX-2138	951700	Active
<input type="radio"/> BLACKBIRD, BARBARA	XXX-XX-5174	144655	Retired
<input type="radio"/> BLUE JAY, BONNIE	XXX-XX-2844	211699	Retired
<input type="radio"/> BUDGERIGAR, HELEN	XXX-XX-3714	136979	Deceased
<input type="radio"/> BULFINCH, BETTY	XXX-XX-8133	959349	Active
<input type="radio"/> CASSAWARIES, CHRIS	XXX-XX-5932	126245	Retired
<input type="radio"/> CUCKOOS, DIANE	XXX-XX-4886	343773	Retired
<input type="radio"/> DOVE, DEB E	XXX-XX-7668	956333	Inactive
<input type="radio"/> FALCON, FRANK	XXX-XX-4464	247600	Retired
<input type="radio"/> GOLDFINCH, JENNA	XXX-XX-8744	78314	Deceased
<input type="radio"/> GREBE, GABE	XXX-XX-6807	188940	Deceased

Cancel Next

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**.

Retiree Enrollment

1 Select Member 2 Select Event 3 Select Coverages 4 Coverage Details 5 Review & Confirm

Please select the member that this enrollment is for

Q Dove, Deb Search

Member Name	SSN	Member Number	Status
<input checked="" type="radio"/> DOVE, DEB E	XXX-XX-7668	956333	Inactive

Cancel Next 4

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**.

The screenshot shows the 'Retiree Enrollment' form with a progress bar at the top indicating five steps: 1. Select Member, 2. Select Event, 3. Select Coverages, 4. Coverage Details, and 5. Review & Confirm. The 'Select Event' step is currently active. Below the progress bar, there is a table with member information: Member Name (Dove, Deb E), SSN (XXX-XX-7668), Member Number (956333), and Event (Initial Enrollment). Below this table, a prompt asks to 'Please select the event that is triggering this enrollment.' There are three buttons: 'CANCEL ENROLLMENT', 'CHANGE ENROLLMENT', and 'CORRECT ENROLLMENT'. The 'INITIAL ENROLLMENT' button is highlighted with a red arrow and the number 5, and it has a green checkmark next to it. Below the buttons, the 'Event Details' section shows 'Event Date' as 03/08/2024 and 'Coverage Start Date' as 03/08/2024. At the bottom of the form, there are 'Cancel', 'Previous', and 'Next' buttons.

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.

The screenshot shows the 'Retiree Enrollment' form with a red error banner at the top that reads 'Error' and 'Invalid Coverage Start Date.' Below the error banner, the progress bar shows five steps: 1. Select Member, 2. Select Event, 3. Select Coverages, 4. Coverage Details, and 5. Review & Confirm. The 'Select Event' step is currently active.

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

INITIAL ENROLLMENT

Event Details

Event Date*
03/08/2024

Coverage Start Date*
01/01/2024

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**.

Retiree Enrollment

1 Select Member 2 Select Event 3 Select Coverages 4 Coverage Details 5 Review & Confirm

Member Name: Dowe, Deb E ID#: XXX-XX-7668 Member Number: 950223 Event: Initial Enrollment

Select the Plan and Plan Coverage from the options below:

Medical	Insurance Carrier	Insurance Plan	Plan Coverage	Premium
<input type="radio"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Survivor	\$17.50
<input type="radio"/>	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Survivor	\$0.01
<input type="radio"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	\$944.38
<input type="radio"/>	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	\$886.33
<input checked="" type="radio"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	\$406.39
<input type="radio"/>	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	\$330.74
<input type="radio"/>	MEDEX HEALTH	MEDEX (MX)	Senior	\$197.63
<input type="radio"/>	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	\$395.24

Second Medical	Insurance Carrier	Insurance Plan	Plan Coverage	Premium
<input checked="" type="radio"/>	MEDEX HEALTH	MEDEX (MX)	Senior	\$197.63

Basic Life	Insurance Carrier	Insurance Plan	Plan Coverage	Premium
<input checked="" type="radio"/>	BASIC LIFE	BASIC LIFE (2000)	Individual	\$2.49

Dental

Cancel Previous 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.*

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

Retiree Enrollment

Step 7: Coverage Details

Member Name: Dove, Deb E | EIN: XXX-XX-7668 | Member Number: 956333 | Event: Initial Enrollment

Please choose the appropriate start and stop dates for your enrollment selections.

Medical	Second Medical	Basic Life
Actions New Coverage Carrier / Plan / Coverage Option BLUE CROSS BLUE SHIELD-BLUE CROSS - BLUE SHIELD (BC)/Individual Coverage Start Date 01/01/2024 Coverage Stop Date 	Actions New Coverage Carrier / Plan / Coverage Option MEDEX HEALTH/MEDEX (Mtu)/Senior Coverage Start Date 01/01/2024 Coverage Stop Date 	Actions New Coverage Carrier / Plan / Coverage Option BASIC LIFE/BASIC LIFE (2000)/Individual Coverage Start Date 01/01/2024 Coverage Stop Date

7

Cancel Previous Next

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

BLUE CROSS BLUE SHIELD/BLUE CROSS - BLUE SHIELD (BC)/Individual

Coverage Start Date

01/01/2024

Carrier / Plan / Coverage Option

MEDEX HEALTH/MEDEX

Coverage Start Date

01/01/2024

Carrier / Plan / Coverage Option

BASIC LIFE/BASIC LIFE (2000)/Individual

Coverage Start Date

01/01/2024

Confirm

You have selected an effective date that is not the current month. Please verify.

Yes No

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

Retiree Enrollment

Please review and confirm the Enrollment details.

Member Info

Member Name Dove, Deb E	SSN XXX-XX-7668	Member Number 956333	Event Initial Enrollment
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Premium Info

New Cost Standard Member Premium \$606.48	Previous Cost \$0.00
---	-------------------------

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
Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	01/01/2024		\$2.49
Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	01/01/2024		\$406.36

Buttons: Cancel, Previous, **Confirm**

Previous Cost
\$0.00

⚠ Confirm

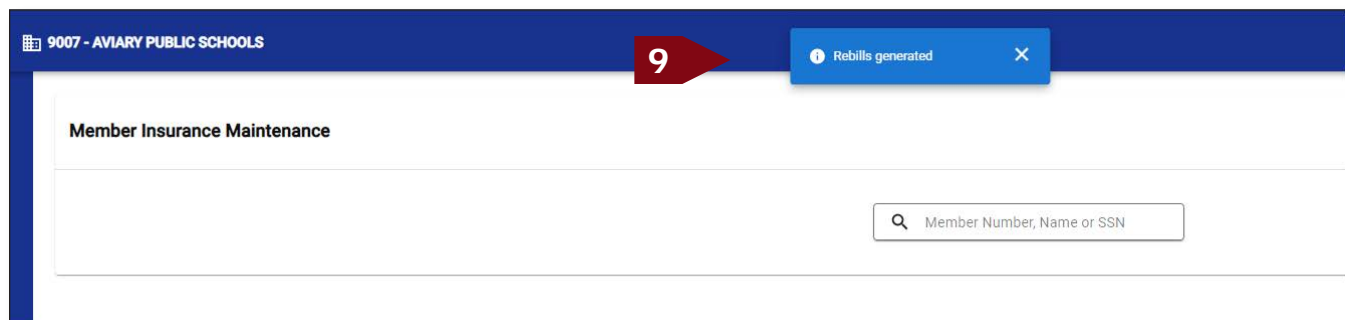
The insurance coverage you have entered, including the rebill, is greater than 50% of your retiree's gross monthly benefit. This is prohibited. Please contact the Employer Services Unit for assistance.

Yes **No**

BLUE CROSS - BLUE SHIELD (BC) Individual 01/01

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.



9007 - AVIARY PUBLIC SCHOOLS

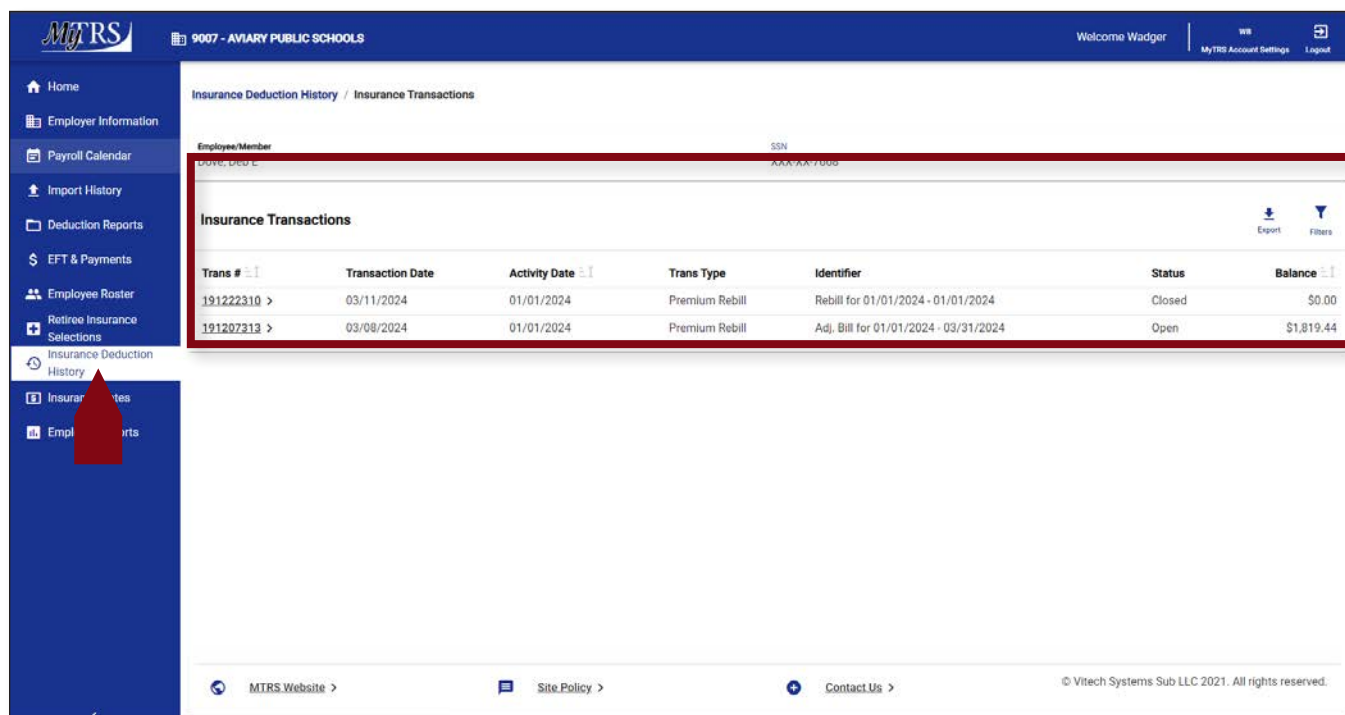
9

Rebills generated

Member Insurance Maintenance

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.*



MyTRS 9007 - AVIARY PUBLIC SCHOOLS Welcome Wadger MyTRS Account Settings Logout

Home Employer Information Payroll Calendar Import History Deduction Reports EFT & Payments Employee Roster Retiree Insurance Selections Insurance Deduction History Insurance Notes Employee Reports

Insurance Deduction History / Insurance Transactions

Employee/Member SSN
XXXX-XXXX-XXXX

Insurance Transactions

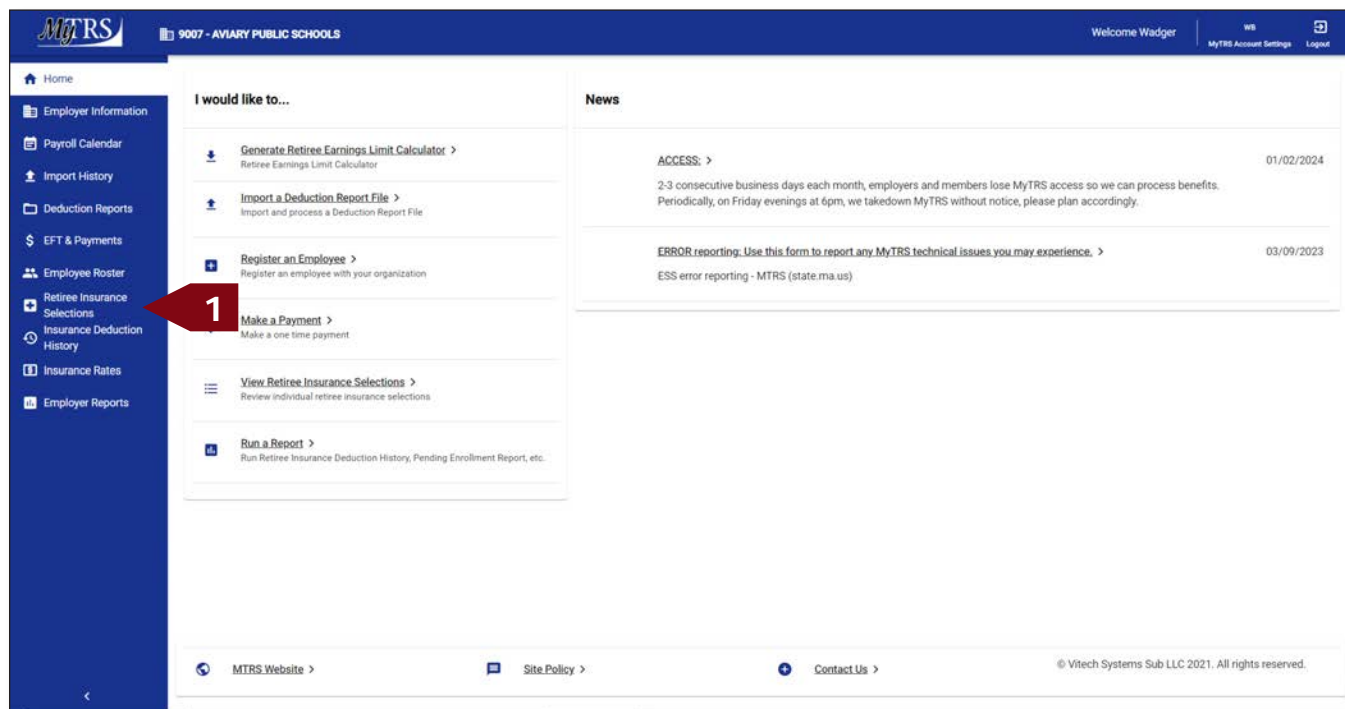
Trans #	Transaction Date	Activity Date	Trans Type	Identifier	Status	Balance
191222310 >	03/11/2024	01/01/2024	Premium Rebill	Rebill for 01/01/2024 - 01/01/2024	Closed	\$0.00
191207313 >	03/08/2024	01/01/2024	Premium Rebill	Adj. Bill for 01/01/2024 - 03/31/2024	Open	\$1,819.44

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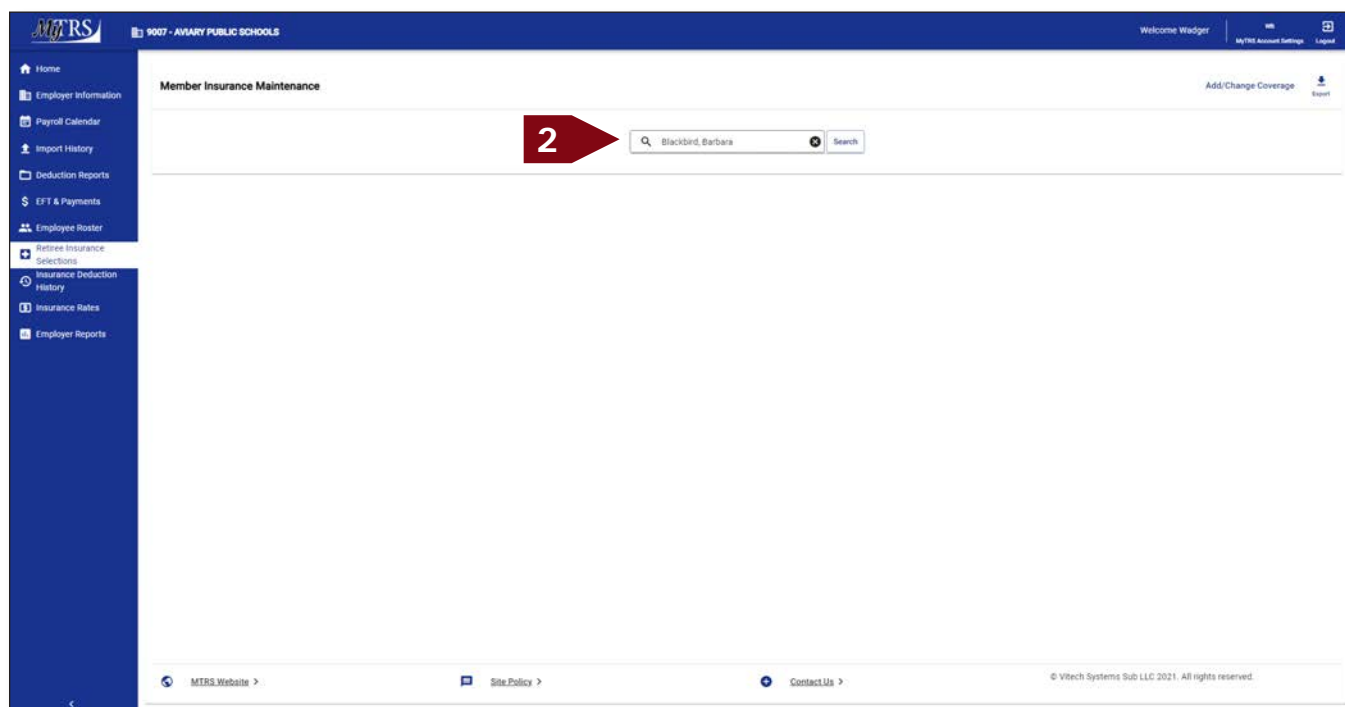
Chapter 5—Change Enrollments

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.



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.



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

Click **Add / Change Coverage**.

Member Insurance Maintenance

Search: Blackbird, Barbara

SSN	Member Number	Member Name	Coverage Type	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premium Amount
XXX-XX-5174	144655	Blackbird, Barbara	Basic Life	BASIC LIFE (2000)	Individual	07/01/2023		\$2.49
XXX-XX-5174	144655	Blackbird, Barbara	Medical	HMO BLUE (HB)	Individual	07/01/2023		\$330.74
XXX-XX-5174	144655	Blackbird, Barbara	Dental	NOT APPLICABLE (NA)	Individual	07/01/2022		\$47.83
XXX-XX-5174	144655	Blackbird, Barbara	Medical	HMO BLUE (HB)	Individual	07/01/2022	06/30/2023	\$310.52
XXX-XX-5174	144655	Blackbird, Barbara	Medical	HMO BLUE (HB)	Individual	07/01/2020	06/30/2022	\$287.87
XXX-XX-5174	144655	Blackbird, Barbara	Medical	HMO BLUE (HB)	Individual	07/01/2019	06/30/2020	\$280.33
XXX-XX-5174	144655	Blackbird, Barbara	Dental	NOT APPLICABLE (NA)	Individual	07/01/2019	06/30/2022	\$47.83
XXX-XX-5174	144655	Blackbird, Barbara	Medical	HMO BLUE (HB)	Individual	07/01/2017	06/30/2019	\$301.43
XXX-XX-5174	144655	Blackbird, Barbara	Dental	NOT APPLICABLE (NA)	Individual	04/01/2017	06/30/2019	\$49.00
XXX-XX-5174	144655	Blackbird, Barbara	Medical	HMO BLUE (HB)	Individual	07/01/2016	06/30/2017	\$289.84
XXX-XX-5174	144655	Blackbird, Barbara	Medical	HMO BLUE (HB)	Individual	07/01/2015	06/30/2016	\$265.51
XXX-XX-5174	144655	Blackbird, Barbara	Medical	HMO BLUE (HB)	Individual	07/01/2014	06/30/2015	\$239.42
XXX-XX-5174	144655	Blackbird, Barbara	Medical	HMO BLUE (HB)	Individual	07/01/2013	06/30/2014	\$227.19
XXX-XX-5174	144655	Blackbird, Barbara	Dental	NOT APPLICABLE (NA)	Individual	04/01/2013	03/31/2017	\$47.57
XXX-XX-5174	144655	Blackbird, Barbara	Basic Life	BASIC LIFE (2000)	Individual	10/01/2003	06/30/2023	\$2.15

Buttons: Add/Change Coverage, Export, Filter

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- 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**.

Retiree Enrollment

1 Select Member 2 Select Event 3 Select Coverages 4 Coverage Details 5 Review & Confirm

Please select the member that this enrollment is for

Search: 144655

Member Name	SSN	Member Number	Status
<input type="radio"/> ALBATROSS, AMY	XXX-XX-4579	192667	Retired
<input type="radio"/> ANHINGA, ALICE	XXX-XX-2138	951700	Active
<input type="radio"/> BLACKBIRD, BARBARA	XXX-XX-5174	144655	Retired
<input type="radio"/> BLUE JAY, BONNIE	XXX-XX-2844	211699	Retired
<input type="radio"/> BUDGERIGAR, HELEN	XXX-XX-3714	136979	Deceased
<input type="radio"/> BULFINCH, BETTY	XXX-XX-8133	990349	Active
<input type="radio"/> CASSANARIES, CHRIS	XXX-XX-5932	120245	Retired
<input type="radio"/> CUCKOOS, DIANE	XXX-XX-4886	343773	Retired
<input type="radio"/> DOVE, DEB E	XXX-XX-7668	956333	Inactive
<input type="radio"/> FALCON, FRANK	XXX-XX-4484	247600	Retired
<input type="radio"/> GOLDFINCH, JENNA	XXX-XX-8744	78314	Deceased
<input type="radio"/> GREBE, GABE	XXX-XX-8807	188940	Deceased
<input type="radio"/> HORNBILL, NORMA	XXX-XX-7155	307763	Retired
<input type="radio"/> JABIRU, JANET	XXX-XX-9981	243529	Active
<input type="radio"/> KINGFISHER, MOLLY	XXX-XX-4016	115771	Retired
<input type="radio"/> LIMPKIN, LUCILLE	XXX-XX-2060	354680	Active
<input type="radio"/> MALLARD, MARK	XXX-XX-6581	117892	Retired
<input type="radio"/> NIGHTINGALE, NANCY	XXX-XX-1817	990774	Retired

Buttons: Cancel, Search

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**.

The screenshot shows the 'Retiree Enrollment' window with a progress bar at the top indicating five steps: 1. Select Member, 2. Select Event, 3. Select Coverages, 4. Coverage Details, and 5. Review & Confirm. Step 1 is currently active. Below the progress bar, a search bar contains the number '144555'. A table lists member information:

Member Name	SSN	Member Number	Status
BLACKBIRD, BARBARA	XXX-XX-5174	144555	Retired

A red arrow labeled '5' points to the 'Next' button at the bottom right of the window.

6. Click **Change Enrollment**.

The screenshot shows the 'Retiree Enrollment' window at Step 2: Select Event. The progress bar shows Step 2 is active. Below the progress bar, the member information is displayed: Member Name: Blackbird, Barbara; SSN: XXX-XX-5174; Member Number: 144555; Event: Change Enrollment. A red arrow labeled '6' points to the 'CHANGE ENROLLMENT' button in the 'Event Details' section.

The 'Event Details' section contains the following options:

- CANCEL ENROLLMENT
- CHANGE ENROLLMENT (highlighted with a green checkmark)
- CORRECT ENROLLMENT
- INITIAL ENROLLMENT

Below these options, the 'Event Date' is set to 03/08/2024 and the 'Coverage Start Date' is set to 01/01/2024. The 'Next' button is visible at the bottom right.

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.

Progress bar: 1. Select Member (checked), 2. Select Event, 3. Select Coverages, 4. Coverage Details, 5. Review & Confirm

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

Retiree Enrollment

Progress bar: 1. Select Member, 2. Select Event (checked), 3. Select Coverages, 4. Coverage Details, 5. Review & Confirm

Member Name: Blackford, Barbara
SSN: XXX-XX-5174
Member Number: 144655
Event: Change Enrollment

Please select the event that is triggering this enrollment:

CANCEL ENROLLMENT
CHANGE ENROLLMENT (checked)
CORRECT ENROLLMENT
INITIAL ENROLLMENT

Event Details

Event Date: 03/06/2024
Coverage Start Date: 01/1/2024

Buttons: Cancel, Previous, **Next** (highlighted with red arrow 'a')

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

Retiree Enrollment

Progress: 1. Select Member, 2. Select Event, 3. Select Coverages, 4. Coverage Details, 5. Review & Confirm

Member Name: Blackford, Barbara | SSN: XXX-XX-5174 | Member Number: 144655 | Event: Change Enrollment

Select the Plan and Plan Coverage from the options below.

Medical	Insurance Carrier	Insurance Plan	Plan Coverage	Premium
<input type="radio"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Survivor	\$17.50
<input type="radio"/>	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Survivor	\$0.01
<input type="radio"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	\$944.38
<input type="radio"/>	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	\$886.33
<input type="radio"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	\$406.36
<input checked="" type="radio"/>	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	\$330.74
<input type="radio"/>	MEDEX HEALTH	MEDEX (MX)	Senior	\$197.63
<input type="radio"/>	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	\$395.24

Second Medical	Insurance Carrier	Insurance Plan	Plan Coverage	Premium
<input type="radio"/>	MEDEX HEALTH	MEDEX (MX)	Senior	\$197.63

Basic Life	Insurance Carrier	Insurance Plan	Plan Coverage	Premium
<input checked="" type="radio"/>	BASIC LIFE	BASIC LIFE (2000)	Individual	\$2.49

Dental

Buttons: Cancel, Previous, Next

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.

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

Retiree Enrollment

Progress: 1. Select Member, 2. Select Event, 3. Select Coverages, 4. Coverage Details, 5. Review & Confirm

Member Name: Blackford, Barbara | SSN: XXX-XX-5174 | Member Number: 144655 | Event: Change Enrollment

Select the Plan and Plan Coverage from the options below.

Medical	Insurance Carrier	Insurance Plan	Plan Coverage	Premium
<input type="radio"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Survivor	\$17.50
<input type="radio"/>	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Survivor	\$0.01
<input type="radio"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	\$944.38
<input type="radio"/>	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	\$886.33
<input type="radio"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	\$406.36
<input checked="" type="radio"/>	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	\$330.74
<input type="radio"/>	MEDEX HEALTH	MEDEX (MX)	Senior	\$197.63
<input type="radio"/>	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	\$395.24

Second Medical	Insurance Carrier	Insurance Plan	Plan Coverage	Premium
<input type="radio"/>	MEDEX HEALTH	MEDEX (MX)	Senior	\$197.63

Basic Life	Insurance Carrier	Insurance Plan	Plan Coverage	Premium
<input checked="" type="radio"/>	BASIC LIFE	BASIC LIFE (2000)	Individual	\$2.49

Dental

Buttons: Cancel, Previous, 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**.

The screenshot shows the 'Retiree Enrollment' window. It has a progress bar with five steps: Select Member, Select Event, Select Coverages, Coverage Details (current step), and Review & Confirm. Below the progress bar, it shows member information: Member Name (Blackford, Barbara), SSN (XXX-XX-5174), Member Number (144655), and Event (Change Enrollment). A message says: 'Please choose the appropriate start and stop dates for your enrollment selections'. There are two tables: 'Medical' and 'Basic Life'. The 'Medical' table has columns: Actions, New or Existing?, Carrier / Plan / Coverage Option, Coverage Start Date, and Coverage Stop Date. It lists several existing coverage rows with 'Delete' links. The 'Basic Life' table has similar columns. At the bottom, there are 'Cancel', 'Previous', and 'Next' buttons. A red arrow with the number '9' points to the 'Next' button.

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

The screenshot shows a 'Confirm' dialog box with a yellow background and a red triangle icon. The text inside says: 'You have selected an effective date that is not the current month. Please verify.' There are two buttons: 'Yes' (orange) and 'No' (white). In the background, a table is visible with columns 'Coverage Option' and 'Coverage Start Date'. The table lists several coverage options with their start dates, including 'SHIELD/BLUE CROSS - BLUE SHIELD (BC)/Individual' with start date '02/01/2024'.

- 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.

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

Retiree Enrollment

Please review and confirm the Enrollment details.

Member Information:

Field	Value
SSN	XXX-XX-5174
First Name	John
Last Name	Smith
Birth Date	10/10/1950
Enroll Change Enrollment	

Premium Info:

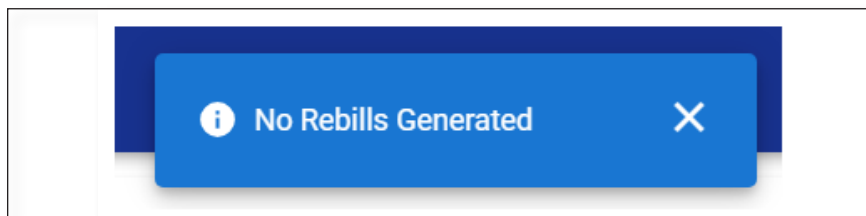
Field	Value
New Cost	\$456.68
Standard Member Premium	\$456.68
Previous Cost	\$381.06
Standard Member Premium	\$381.06

Enrolled Plans:

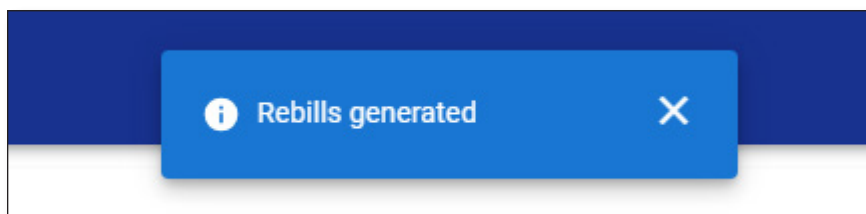
Coverage Type	Insurance Carrier	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premium
Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/2023		\$2.49
Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	10/01/2023	06/30/2023	\$2.15
Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	02/01/2024		\$406.36
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2023	01/31/2024	\$330.74
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)	Individual	07/01/2020	06/30/2022	\$287.87
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (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	\$269.84
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2015	06/30/2016	\$239.42
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2014	06/30/2015	\$227.19
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2013	06/30/2014	\$222.19
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	07/01/2022		\$41.00

Buttons: Cancel, Previous, Confirm

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



- 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.

MyTRS 9007 - AVIARY PUBLIC SCHOOLS Welcome Wadger WB MyTRS Account Settings Logout

Home Employer Information Payroll Calendar Import History Deduction Reports EFT & Payments Employee Roster Retiree Insurance Selections **Insurance Deduction History** Insurance Rates Employer Reports

Insurance Deduction History / Insurance Transactions

Employee/Member: Blackbird, Barbara SSN: XXX-XX-5174

Insurance Transactions Export Filters

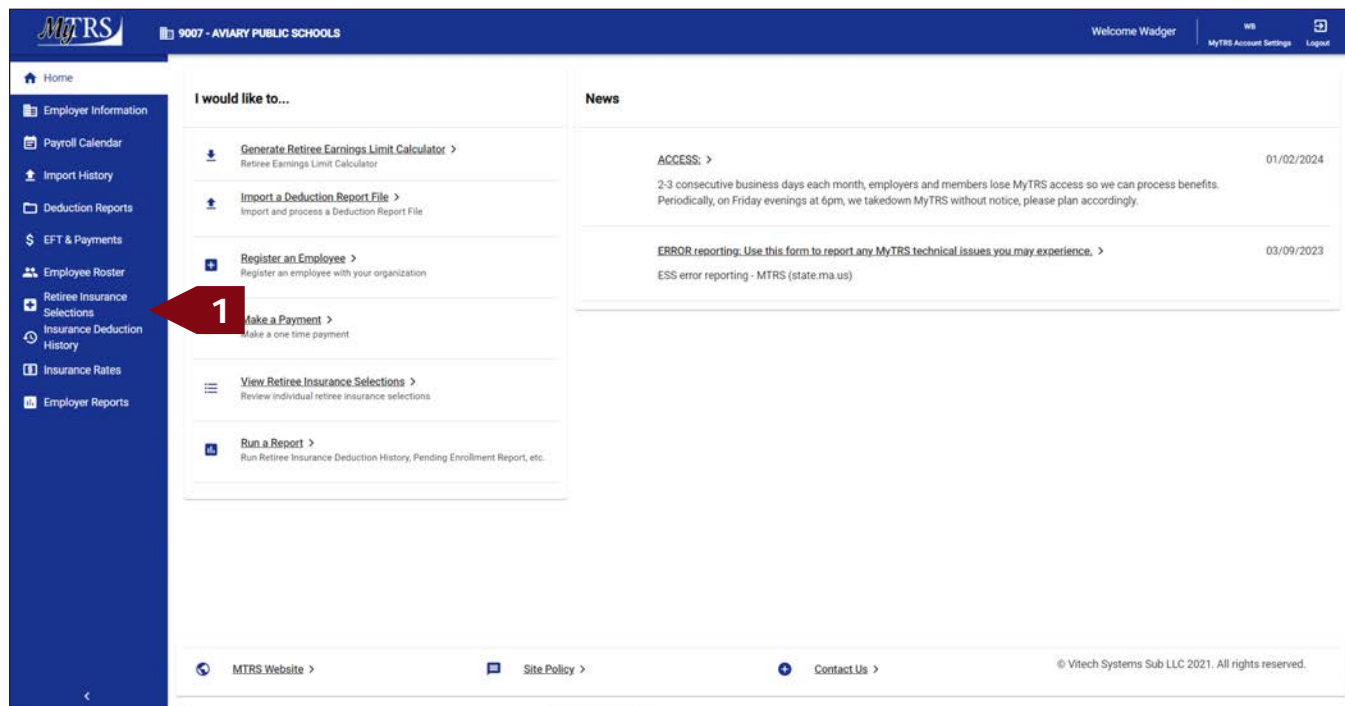
Trans #	Transaction Date	Activity Date	Trans Type	Identifier	Status	Balance
191207316 >	03/08/2024	02/01/2024	Premium Rebill	Rebill for 02/01/2024 - 03/31/2024	Open	\$1.24
191069170 >	02/15/2024	02/15/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
191069169 >	02/15/2024	02/15/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
191069168 >	02/15/2024	02/15/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
190996764 >	02/15/2024	03/01/2024	Premium Bill	EBILL for 03/01/2024 - 03/31/2024	Closed	\$0.00
185256206 >	01/22/2024	01/22/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
185256205 >	01/22/2024	01/22/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
185256204 >	01/22/2024	01/22/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
185120589 >	01/22/2024	02/01/2024	Premium Bill	EBILL for 02/01/2024 - 02/29/2024	Closed	\$0.00
179419487 >	12/19/2023	12/19/2023	Disbursement Deduction	Disb Request	Closed	\$0.00
179419486 >	12/19/2023	12/19/2023	Disbursement Deduction	Disb Request	Closed	\$0.00
179419485 >	12/19/2023	12/19/2023	Disbursement Deduction	Disb Request	Closed	\$0.00
179266481 >	12/19/2023	01/01/2024	Premium Bill	EBILL for 01/01/2024 - 01/31/2024	Closed	\$0.00
174018718 >	11/16/2023	11/16/2023	Disbursement Deduction	Disb Request	Closed	\$0.00
174018717 >	11/16/2023	11/16/2023	Disbursement Deduction	Disb Request	Closed	\$0.00

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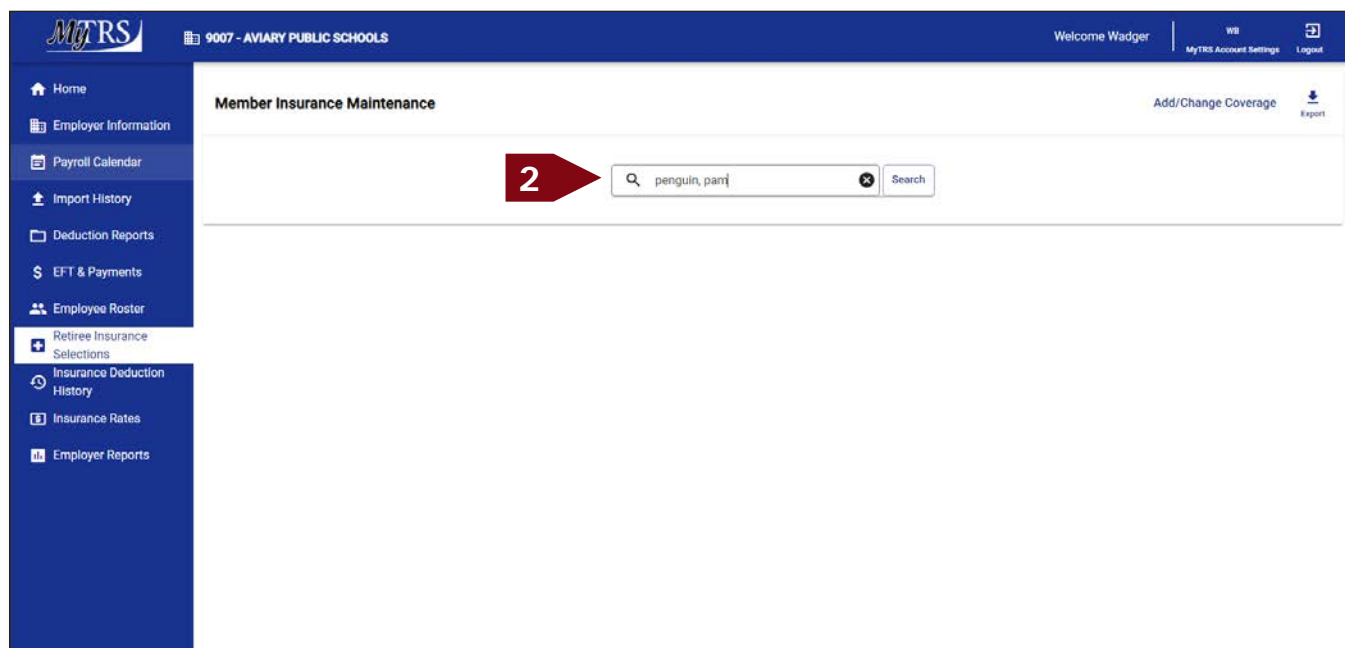
Chapter 6—Replacing one plan for another with the same start date

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.



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.



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

Click **Add / Change Coverage**.

Member Insurance Maintenance

Search: penguin, pam

SSN	Member Number	Member Name	Coverage Type	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premium Amount
XXX-XX-5215	231917	Penguin, Pamela H	Medical	MEDEX (MX)	Senior	01/01/2024		\$197.63
XXX-XX-5215	231917	Penguin, Pamela H	Medical	MEDEX (MX)	Senior	01/01/2023	12/31/2023	\$189.96
XXX-XX-5215	231917	Penguin, Pamela H	Dental	NOT APPLICABLE (NA)	Individual	07/01/2022		\$47.83
XXX-XX-5215	231917	Penguin, Pamela H	Medical	MEDEX (MX)	Senior	01/01/2022	12/31/2022	\$199.96
XXX-XX-5215	231917	Penguin, Pamela H	Dental	NOT APPLICABLE (NA)	Individual	07/01/2019	06/30/2022	\$47.83
XXX-XX-5215	231917	Penguin, Pamela H	Medical	MEDEX (MX)	Senior	01/01/2018	12/31/2021	\$197.71
XXX-XX-5215	231917	Penguin, Pamela H	Dental	NOT APPLICABLE (NA)	Individual	04/01/2017	06/30/2019	\$49.00
XXX-XX-5215	231917	Penguin, Pamela H	Medical	MEDEX (MX)	Senior	01/01/2017	12/31/2017	\$194.94
XXX-XX-5215	231917	Penguin, Pamela H	Medical	MEDEX (MX)	Senior	01/01/2016	12/31/2016	\$175.20
XXX-XX-5215	231917	Penguin, Pamela H	Medical	MEDEX (MX)	Senior	01/01/2015	12/31/2015	\$166.57
XXX-XX-5215	231917	Penguin, Pamela H	Medical	MEDEX (MX)	Senior	07/01/2014	12/31/2014	\$160.70
XXX-XX-5215	231917	Penguin, Pamela H	Medical	MEDEX (MX)	Senior	07/01/2013	06/30/2014	\$274.80
XXX-XX-5215	231917	Penguin, Pamela H	Dental	NOT APPLICABLE (NA)	Individual	04/01/2013	03/31/2017	\$47.57

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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**.

Retiree Enrollment

1 Select Member 2 Select Event 3 Select Coverages 4 Coverage Details 5 Review & Confirm

Please select the member that this enrollment is for

Search: Penguin, Pam

Member Name	SSN	Member Number	Status
<input type="radio"/> ALBATROSSES, AMY	XXX-XX-4579	192667	Retired
<input type="radio"/> ANHINGA, ALICE	XXX-XX-2138	951700	Active
<input type="radio"/> BLACKBIRD, BARBARA	XXX-XX-5174	144655	Retired
<input type="radio"/> BLUE JAY, BONNIE	XXX-XX-2844	211699	Retired
<input type="radio"/> BUDGERIGAR, HELEN	XXX-XX-3714	136979	Deceased
<input type="radio"/> BULFINCH, BETTY	XXX-XX-8133	959349	Active
<input type="radio"/> CASSAWARIES, CHRIS	XXX-XX-5932	126245	Retired
<input type="radio"/> CUCKOOS, DIANE	XXX-XX-4886	343773	Retired
<input type="radio"/> DOVE, DEB E	XXX-XX-7668	956333	Inactive
<input type="radio"/> FALCON, FRANK	XXX-XX-4464	247600	Retired
<input type="radio"/> GOLDFINCH, JENNA	XXX-XX-8744	78314	Deceased

Cancel Next

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**.

Retiree Enrollment

1 Select Member 2 Select Event 3 Select Coverages 4 Coverage Details 5 Review & Confirm

Please select the member that this enrollment is for:

Search: Penguin, Pam

Member Name	SSN	Member Number	Status
<input checked="" type="radio"/> PENGUIN, PAMELA H	XXX-XX-5215	231917	Retired

Cancel Next

6. Click **Change Enrollment**.

Retiree Enrollment

1 Select Member 2 Select Event 3 Select Coverages 4 Coverage Details 5 Review & Confirm

Member Name: Penguin, Pamela H | SSN: XXX-XX-5215 | Member Number: 231917 | Event: Change Enrollment

Please select the event that is triggering this enrollment.

CANCEL ENROLLMENT

CHANGE ENROLLMENT ✓

CORRECT ENROLLMENT

INITIAL ENROLLMENT

Event Details

Cancel Previous Next

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 [Close]

Error
Invalid Coverage Start Date.

Progress bar: 1. Select Member (checked), 2. Select Event, 3. Select Coverages, 4. Coverage Details, 5. Review & Confirm

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

Retiree Enrollment [Close]
Step 2: Select Event

Member Name Penguin, Pamela H	SSN XXX-XX-5215	Member Number 231917	Event Change Enrollment
----------------------------------	--------------------	-------------------------	----------------------------

Please select the event that is triggering this enrollment.

CANCEL ENROLLMENT

CHANGE ENROLLMENT ☒

CORRECT ENROLLMENT

INITIAL ENROLLMENT

Event Details

Event Date*
03/12/2024

Coverage Start Date*
01/01/2024

[Cancel] [Previous] **Next** 7

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.

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

Retiree Enrollment
Step 3: Select Coverages

Member Name: Penguin, Pamela H | SSN: XXX-XX-5215 | Member Number: 231917 | Event: Change Enrollment

Select the Plan and Plan Coverage from the options below.

Insurance Carrier	Insurance Plan	Plan Coverage	Premium
<input type="radio"/> BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Survivor	\$17.50
<input type="radio"/> BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Survivor	\$660.00
<input type="radio"/> BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	\$944.38
<input type="radio"/> BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	\$886.33
<input type="radio"/> BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	\$406.36
<input type="radio"/> BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	\$330.74
<input type="radio"/> MEDEX HEALTH	MEDEX (MX)	Senior	\$197.63
<input type="radio"/> MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	\$395.24
<input type="radio"/> TUFTS HEALTH	TUFTS (T)	Senior	\$97.45
<input checked="" type="radio"/> AETNA	AETNA MEDICARE PLAN (AMP)	Senior	\$87.45

Second Medical

Buttons: Cancel, Previous, 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. Click **Delete** next to the plan you are replacing.

Retiree Enrollment

Progress: Select Member (✓) | Select Event (✓) | Select Coverages (✓) | **Coverage Details (4)** | Review & Confirm (5)

Member Name: Penguin, Pamela H | SSN: XXX-XX-5215 | Member Number: 231917 | Event: Change Enrollment

Please choose the appropriate start and stop dates for your enrollment selections

Actions	New or Existing?	Carrier / Plan / Coverage Option	Coverage Start Date	Coverage Stop Date
	New Coverage	AETNA/AETNA MEDICARE PLAN (AMP)/Senior	01/01/2024	
Delete	Existing Coverage	MEDEX HEALTH/MEDEX (MX)/Senior	01/01/2024	
Delete	Existing Coverage	MEDEX HEALTH/MEDEX (MX)/Senior	01/01/2023	12/31/2023
Delete	Existing Coverage	MEDEX HEALTH/MEDEX (MX)/Senior	01/01/2022	12/31/2022
Delete	Existing Coverage	MEDEX HEALTH/MEDEX (MX)/Senior	01/01/2018	12/31/2021
Delete	Existing Coverage	MEDEX HEALTH/MEDEX (MX)/Senior	01/01/2017	12/31/2017
Delete	Existing Coverage	MEDEX HEALTH/MEDEX (MX)/Senior	01/01/2016	12/31/2016

Buttons: Cancel, Previous, **Next**

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

Retiree Enrollment

Progress: Select Member (✓) | Select Event (✓) | Select Coverages (✓) | **Coverage Details (4)** | Review & Confirm (5)

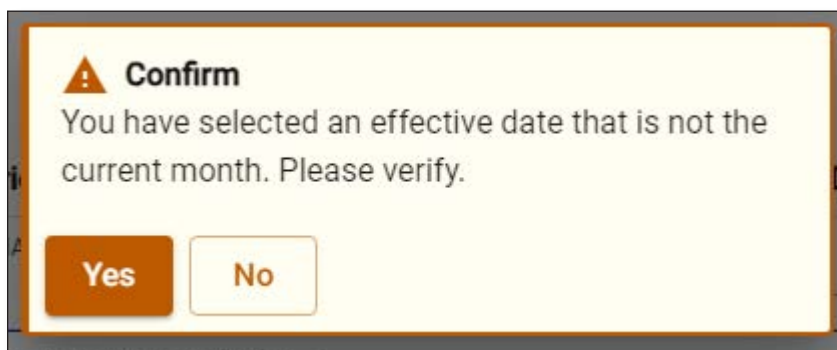
Member Name: Penguin, Pamela H | SSN: XXX-XX-5215 | Member Number: 231917 | Event: Change Enrollment

Please choose the appropriate start and stop dates for your enrollment selections

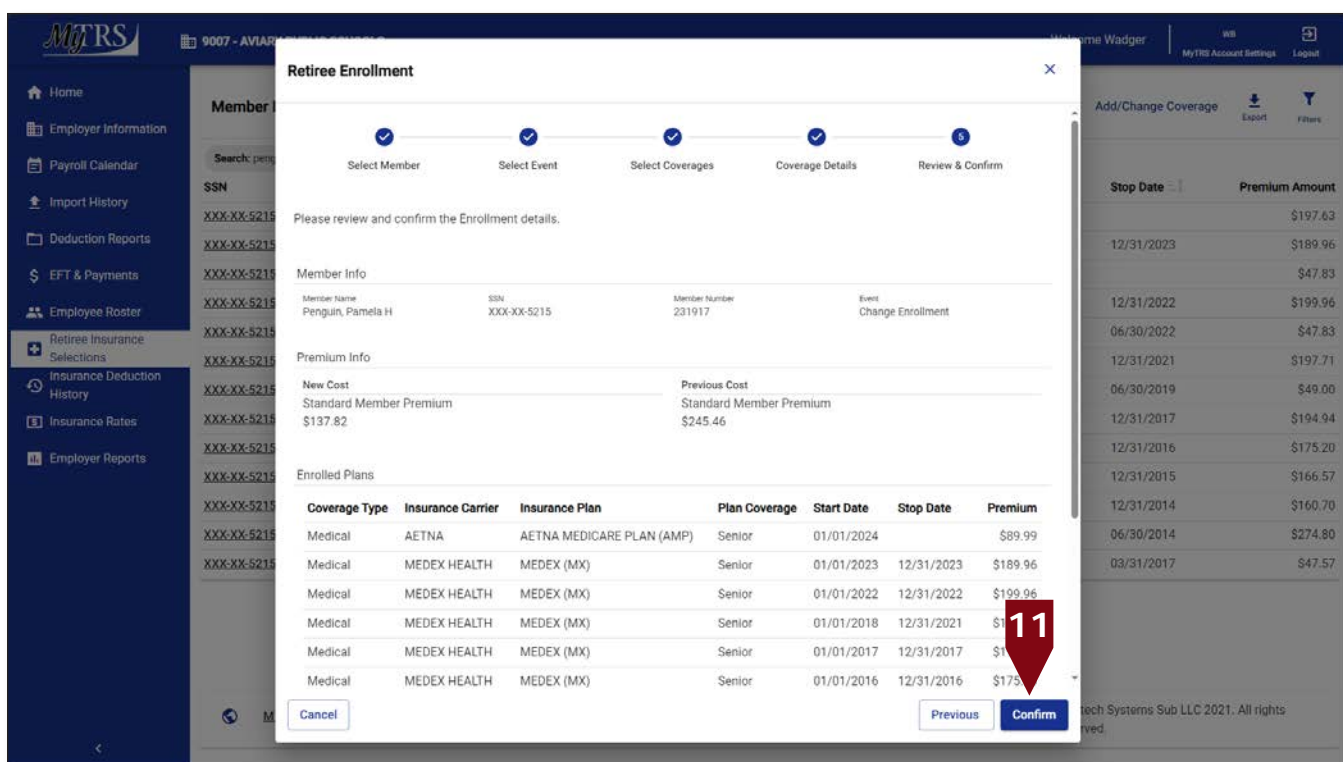
Actions	New or Existing?	Carrier / Plan / Coverage Option	Coverage Start Date	Coverage Stop Date
	New Coverage	AETNA/AETNA MEDICARE PLAN (AMP)/Senior	01/01/2024	
Delete	Existing Coverage	MEDEX HEALTH/MEDEX (MX)/Senior	01/01/2023	12/31/2023
Delete	Existing Coverage	MEDEX HEALTH/MEDEX (MX)/Senior	01/01/2022	12/31/2022
Delete	Existing Coverage	MEDEX HEALTH/MEDEX (MX)/Senior	01/01/2018	12/31/2021
Delete	Existing Coverage	MEDEX HEALTH/MEDEX (MX)/Senior	01/01/2017	12/31/2017
Delete	Existing Coverage	MEDEX HEALTH/MEDEX (MX)/Senior	01/01/2016	12/31/2016
Delete	Existing Coverage	MEDEX HEALTH/MEDEX (MX)/Senior	01/01/2015	12/31/2015

Buttons: Cancel, Previous, **Next**

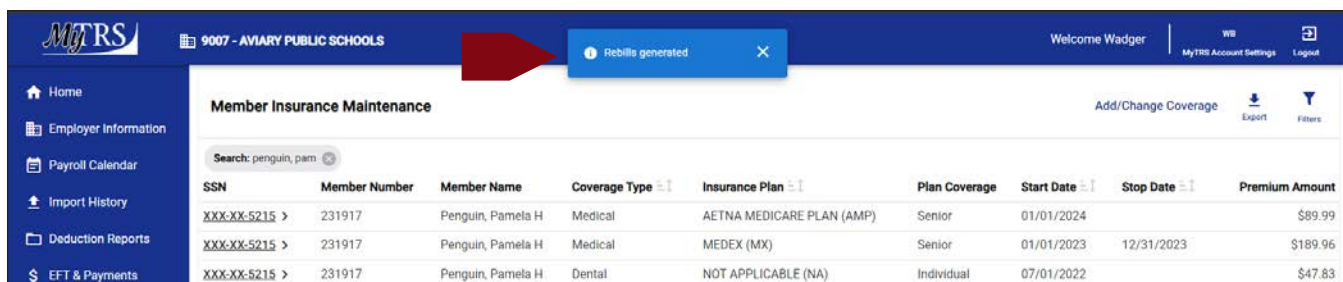
- a. If this message is displayed due to a retroactive start date, click **Yes**.



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



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



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.

MyTRS 9007 - AVIARY PUBLIC SCHOOLS Welcome Wadger WB MyTRS Account Settings Logout

Home
Employer Information
Payroll Calendar
Import History
Deduction Reports
EFT & Payments
Employee Roster
Retiree Insurance Selections
Insurance Deduction History
Insurance Rates
Employer Reports

Insurance Deduction History / Insurance Transactions

Employee/Member: Penguin, Pamela H. SSN: XXX-XX-5215

Insurance Transactions Export Filters

Trans #	Transaction Date	Activity Date	Trans Type	Identifier	Status	Balance
191232345 >	03/12/2024	01/01/2024	Premium Rebill	Rebill for 01/01/2024 - 03/31/2024	Open	(\$322.92)
191119265 >	02/15/2024	02/15/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
191119264 >	02/15/2024	02/15/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
190996776 >	02/15/2024	03/01/2024	Premium Bill	EBILL for 03/01/2024 - 03/31/2024	Closed	\$0.00
185217791 >	01/22/2024	01/22/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
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
179339910 >	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
174045013 >	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
168420417 >	10/19/2023	10/19/2023	Disbursement Deduction	Disb Request	Closed	\$0.00

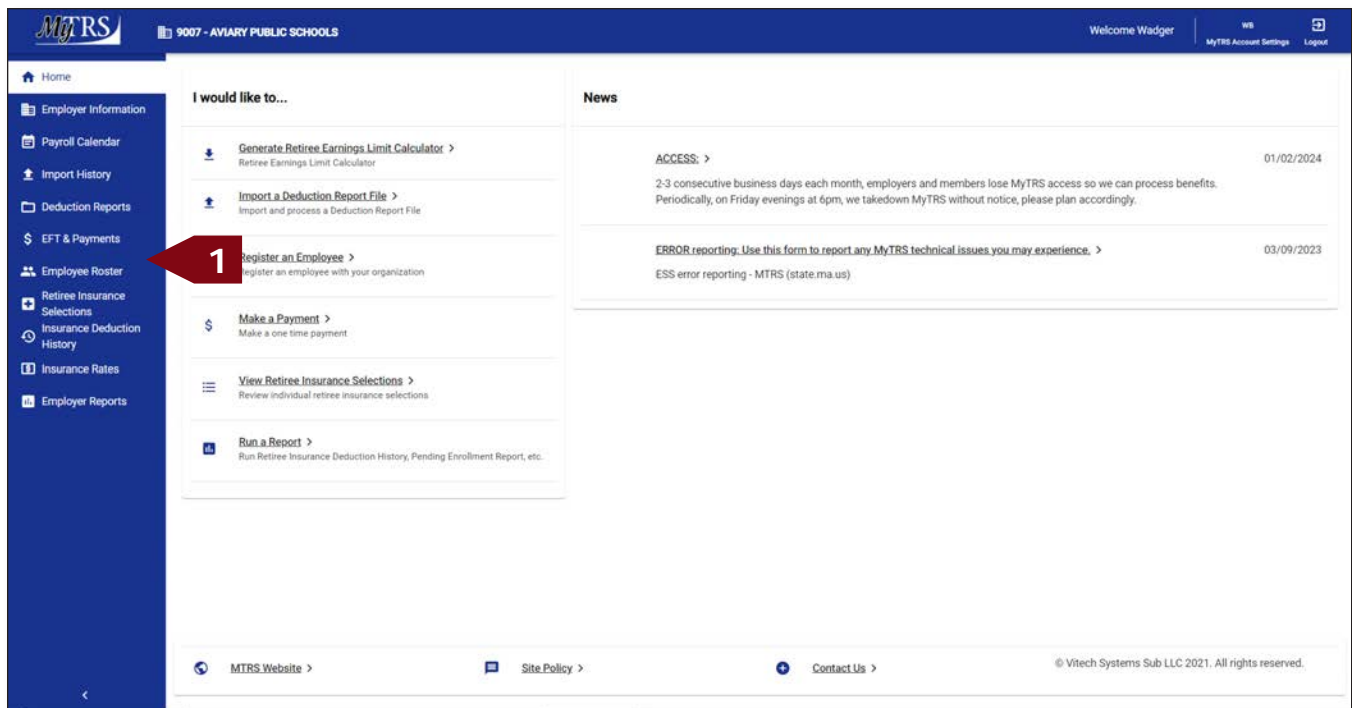
1 - 15 of 383 Page 1 of 26

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

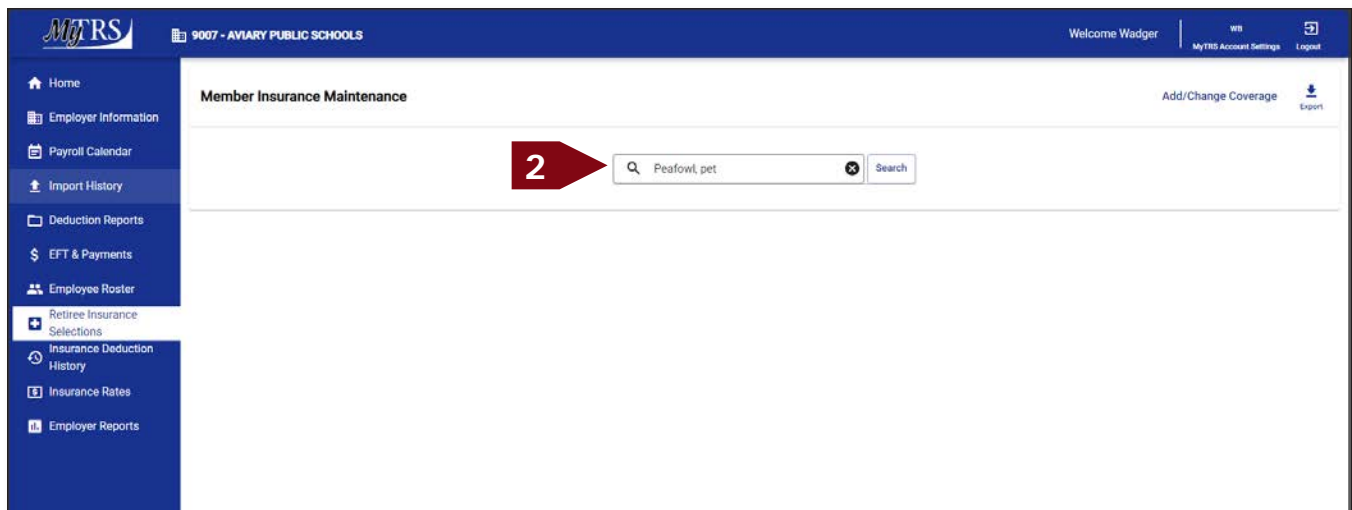
If you are entering retroactive coverage with a start date PRIOR to a new rate going into effect, you will need to add two lines of coverage so that the retiree will be charged appropriately. This will require a 3-step process.

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.



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.



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

Click **Add / Change Coverage**.

Member Insurance Maintenance

Search: Peafowl, pet

SSN	Member Number	Member Name	Coverage Type	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premium Amount
XXX-XX-2175	258350	Peafowl, Petunia	Second Medical	MEDEX (MX)	Senior	01/01/2024		\$197.63
XXX-XX-2175	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Individual	07/01/2023		\$330.74
XXX-XX-2175	258350	Peafowl, Petunia	Second Medical	MEDEX (MX)	Senior	07/01/2023	12/31/2023	\$189.96
XXX-XX-2175	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Family	07/01/2022	06/30/2023	\$832.15
XXX-XX-2175	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Family	07/01/2020	06/30/2022	\$771.45
XXX-XX-2175	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Individual	07/01/2019	06/30/2020	\$280.33
XXX-XX-2175	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Individual	08/01/2017	06/30/2019	\$301.43

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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**.

Retiree Enrollment

1 Select Member 2 Select Event 3 Select Coverages 4 Coverage Details 5 Review & Confirm

Please select the member that this enrollment is for

Search: peafowl

Member Name	SSN	Member Number	Status
<input type="radio"/> ALBATROSS, AMY	XXX-XX-4579	192667	Retired
<input type="radio"/> ANHINGA, ALICE	XXX-XX-2138	951700	Active
<input type="radio"/> BLACKBIRD, BARBARA	XXX-XX-5174	144655	Retired
<input type="radio"/> BLUE JAY, BONNIE	XXX-XX-2844	211699	Retired
<input type="radio"/> BUDGERIGAR, HELEN	XXX-XX-3714	136979	Deceased
<input type="radio"/> BULFINCH, BETTY	XXX-XX-8133	959349	Active
<input type="radio"/> CASSAWARIES, CHRIS	XXX-XX-5932	126245	Retired
<input type="radio"/> CUCKOOS, DIANE	XXX-XX-4886	343773	Retired
<input type="radio"/> DOVE, DEB E	XXX-XX-7668	956333	Inactive
<input type="radio"/> FALCON, FRANK	XXX-XX-4464	247600	Retired
<input type="radio"/> GOLDFINCH, JENNA	XXX-XX-8744	78314	Deceased

Cancel Next

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**.

The screenshot shows the 'Retiree Enrollment' dialog box with a progress bar at the top indicating five steps: 1. Select Member, 2. Select Event, 3. Select Coverages, 4. Coverage Details, and 5. Review & Confirm. Step 1 is currently active. Below the progress bar, it says 'Please select the member that this enrollment is for'. There is a search bar with 'pes' entered. Below the search bar is a table with the following data:

Member Name	SSN	Member Number	Status
<input checked="" type="radio"/> PEAFOWL, PETUNIA	XXX-XX-2175	258350	Retired
<input type="radio"/> PUFFIN, PEARL	XXX-XX-9034	908952	Active

A red arrow labeled '5' points to the radio button next to 'PEAFOWL, PETUNIA'. At the bottom right of the dialog box, there is a blue 'Next' button.

6. Click **Change Enrollment**.

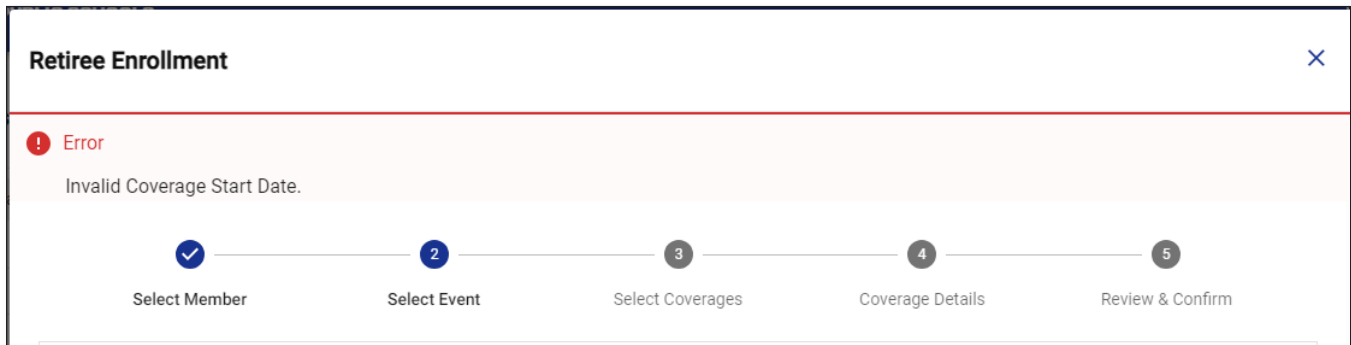
The screenshot shows the 'Retiree Enrollment' dialog box with the progress bar updated. Step 1 is now complete (marked with a checkmark), and Step 2, 'Select Event', is active. Below the progress bar, it says 'Please select the event that is triggering this enrollment.' There is a summary box at the top showing: Member Name: Peafowl, Petunia; SSN: XXX-XX-2175; Member Number: 258350; Event: Change Enrollment. Below this are four buttons: 'CANCEL ENROLLMENT', 'CHANGE ENROLLMENT', 'CORRECT ENROLLMENT', and 'INITIAL ENROLLMENT'. A red arrow labeled '6' points to the 'CHANGE ENROLLMENT' button, which has a green checkmark next to it. At the bottom right, there are 'Previous' and 'Next' buttons.

The following fields will appear:

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

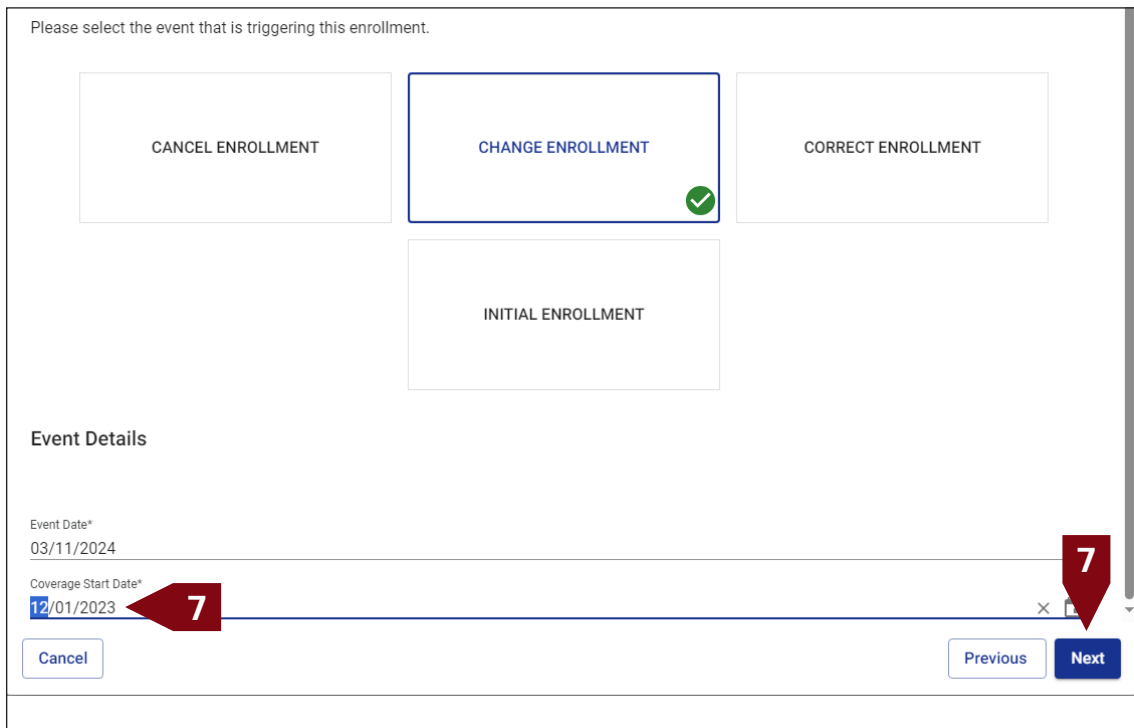
Coverage Start Date—Pre-filled with today's date but **MUST** be changed to the correct start date of the coverage.

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.



The screenshot shows a 'Retiree Enrollment' window with a red error banner at the top stating 'Invalid Coverage Start Date.' Below the banner is a progress bar with five steps: 1. Select Member (completed with a blue checkmark), 2. Select Event (active with a blue circle), 3. Select Coverages (grey circle), 4. Coverage Details (grey circle), and 5. Review & Confirm (grey circle).

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



The screenshot shows the 'Please select the event that is triggering this enrollment.' screen. There are four buttons: 'CANCEL ENROLLMENT', 'CHANGE ENROLLMENT' (highlighted with a blue border and a green checkmark), 'CORRECT ENROLLMENT', and 'INITIAL ENROLLMENT'. Below the buttons is the 'Event Details' section. It contains two date fields: 'Event Date*' with the value '03/11/2024' and 'Coverage Start Date*' with the value '12/01/2023'. A red arrow with the number '7' points to the 'Coverage Start Date' field. At the bottom right, there are 'Previous' and 'Next' buttons, with a red arrow and the number '7' pointing to the 'Next' button. A 'Cancel' button is located at the bottom left.

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

Retiree Enrollment

1 Select Member 2 Select Event 3 **Select Coverages** 4 Coverage Details 5 Review & Confirm

Member Name: Peafowl, Petunia | SSN: XXX-XX-2175 | Member Number: 258350 | Event: Change Enrollment

Please select the Plan and Plan Coverage from the options below.

Insurance Carrier	Insurance Plan	Plan Coverage	Premium
<input type="radio"/> BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	\$944.38
<input type="radio"/> BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	\$886.33
<input type="radio"/> BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	\$406.36
<input type="radio"/> BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	\$330.74
<input checked="" type="radio"/> MEDEX HEALTH	MEDEX (MX)	Senior	\$189.96
<input type="radio"/> MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	\$379.92

Second Medical

Insurance Carrier	Insurance Plan	Plan Coverage	Premium
<input checked="" type="radio"/> MEDEX HEALTH	MEDEX (MX)	Senior	\$189.96

8

Cancel Previous **Next**

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

Retiree Enrollment

1 Select Member 2 Select Event 3 Select Coverages 4 **Coverage Details** 5 Review & Confirm

Member Name: Peafowl, Petunia | SSN: XXX-XX-2175 | Member Number: 258350 | Event: Change Enrollment

Please choose the appropriate start and stop dates for your enrollment selections

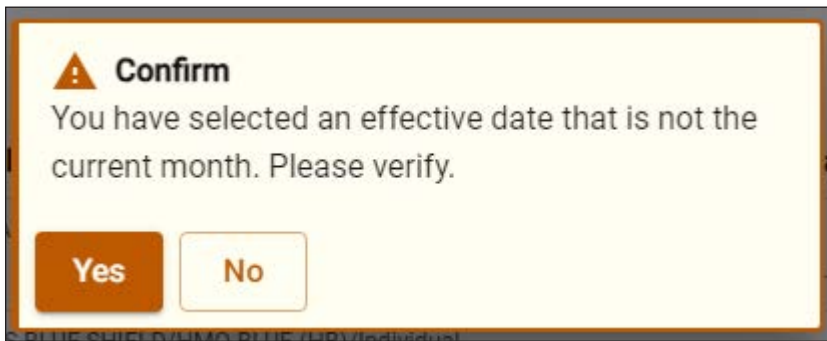
Actions	New or Existing?	Carrier / Plan / Coverage Option	Coverage Start Date	Coverage Stop Date
	New Coverage	MEDEX HEALTH/MEDEX (MX)/Senior	12/01/2023	
Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HMO BLUE (HB)/Individual	07/01/2023	11/30/2023
Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HMO BLUE (HB)/Family	07/01/2022	06/30/2023
Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HMO BLUE (HB)/Family	07/01/2020	06/30/2022
Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HMO BLUE (HB)/Individual	07/01/2019	06/30/2020
Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HMO BLUE (HB)/Individual	08/01/2017	06/30/2019

Second Medical

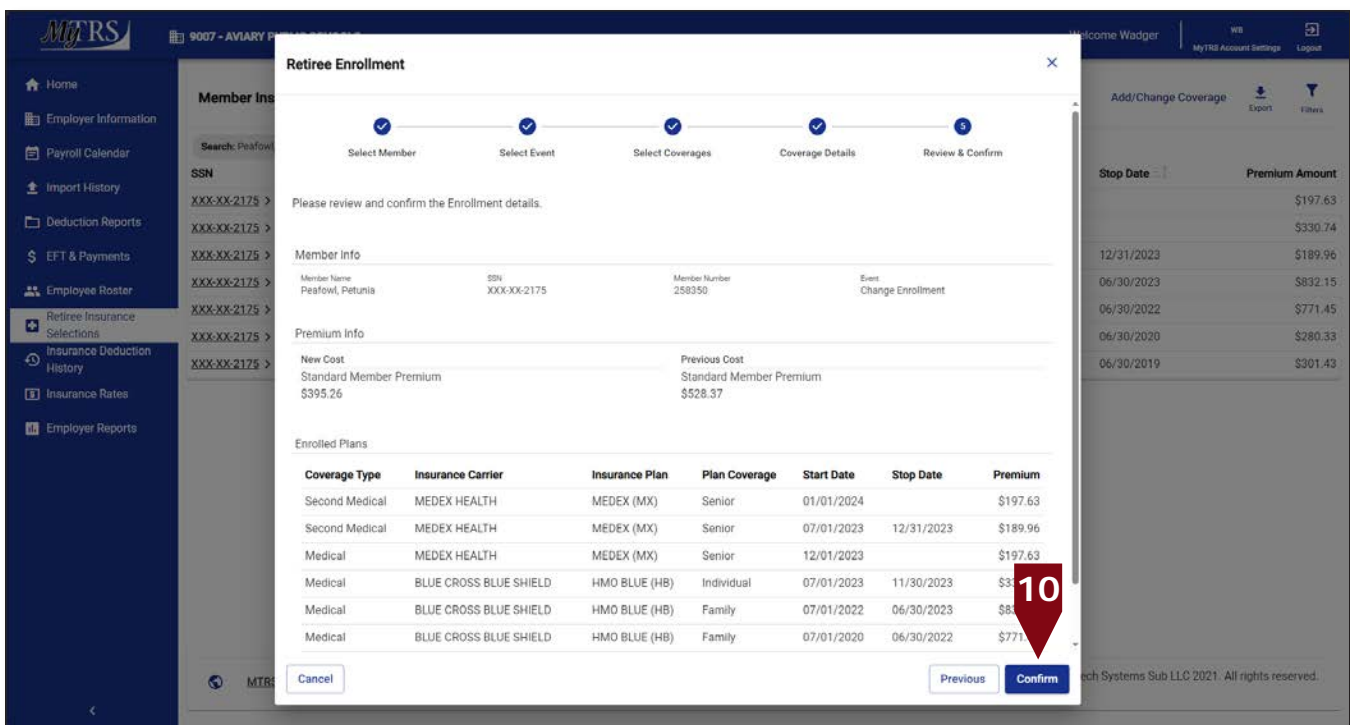
9

Cancel Previous **Next**

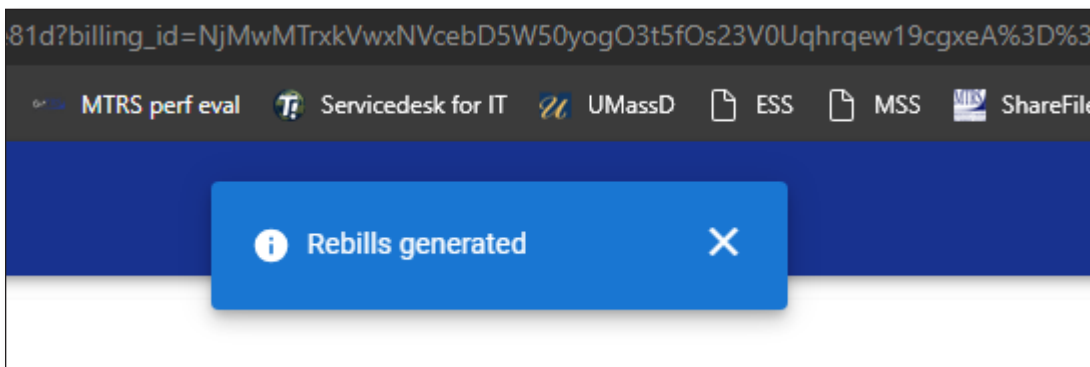
If this message is displayed due to a retroactive start date, click **Yes**.



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



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**.

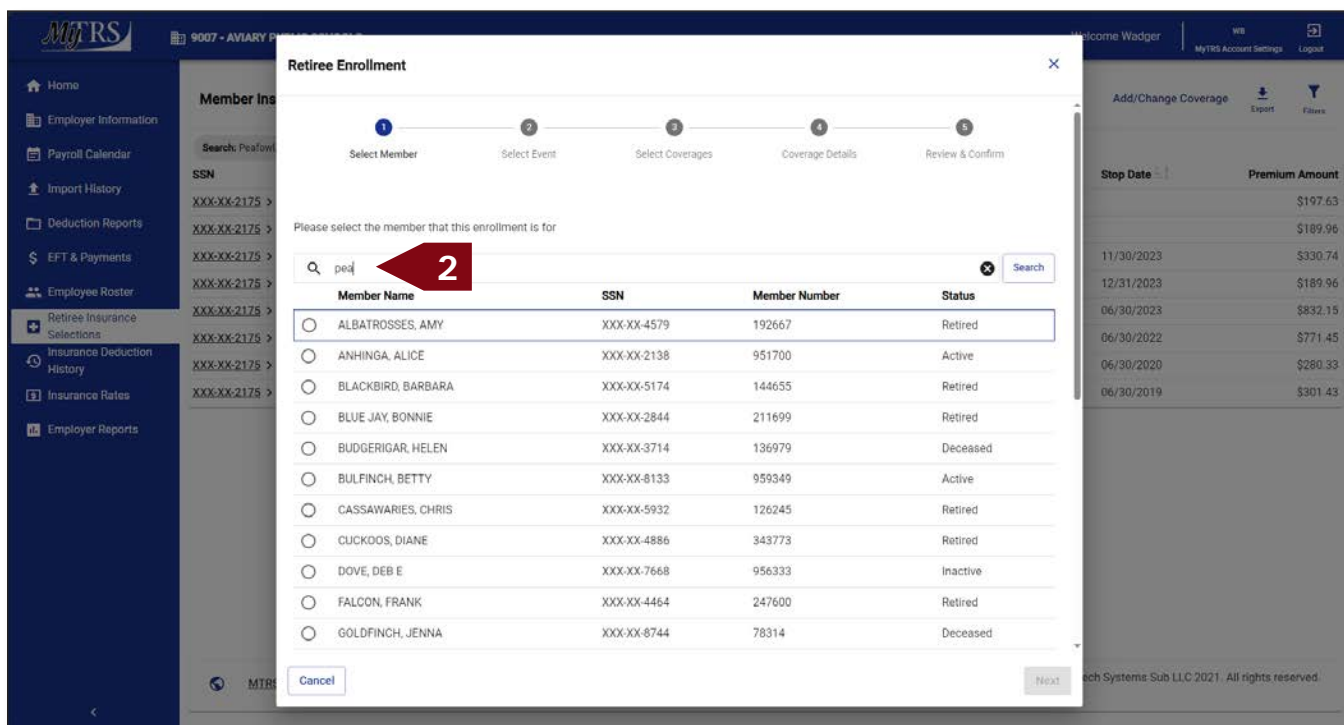


Member Insurance Maintenance

Search: Peafowl, pet

SSN	Member Number	Member Name	Coverage Type	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premium Amount
XXX-XX-2175	258350	Peafowl, Petunia	Second Medical	MEDEX (MX)	Senior	01/01/2024		\$197.63
XXX-XX-2175	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Individual	07/01/2023		\$330.74
XXX-XX-2175	258350	Peafowl, Petunia	Second Medical	MEDEX (MX)	Senior	07/01/2023	12/31/2023	\$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.



Retiree Enrollment

1 Select Member 2 Select Event 3 Select Coverages 4 Coverage Details 5 Review & Confirm

Please select the member that this enrollment is for

Search: pet

Member Name	SSN	Member Number	Status
<input type="radio"/> ALBATROSS, AMY	XXX-XX-4579	192667	Retired
<input type="radio"/> ANHINGA, ALICE	XXX-XX-2138	951700	Active
<input type="radio"/> BLACKBIRD, BARBARA	XXX-XX-5174	144655	Retired
<input type="radio"/> BLUE JAY, BONNIE	XXX-XX-2844	211699	Retired
<input type="radio"/> BUDGERIGAR, HELEN	XXX-XX-3714	136979	Deceased
<input type="radio"/> BULFINCH, BETTY	XXX-XX-8133	959349	Active
<input type="radio"/> CASSAWARES, CHRIS	XXX-XX-5932	126245	Retired
<input type="radio"/> CUCKOOS, DIANE	XXX-XX-4886	343773	Retired
<input type="radio"/> DOVE, DEB E	XXX-XX-7668	956333	Inactive
<input type="radio"/> FALCON, FRANK	XXX-XX-4464	247600	Retired
<input type="radio"/> GOLDFINCH, JENNA	XXX-XX-8744	78314	Deceased

Cancel Next

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

The screenshot shows the 'Retiree Enrollment' window with a progress bar at the top indicating five steps: 1. Select Member, 2. Select Event, 3. Select Coverages, 4. Coverage Details, and 5. Review & Confirm. Step 1 is currently active. Below the progress bar, the text reads 'Please select the member that this enrollment is for'. A search bar contains the text 'pea'. Below the search bar is a table with the following data:

Member Name	SSN	Member Number	Status
<input checked="" type="radio"/> PEAOWL, PETUNIA	XXX-XX-2175	258350	Retired
<input type="radio"/> PUFFIN, PEARL	XXX-XX-9034	908952	Active

A red arrow with the number '1' points to the selected radio button for PEAOWL, PETUNIA. At the bottom right of the window, a red arrow with the number '3' points to the 'Next' button.

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

The screenshot shows the 'Retiree Enrollment' window with the progress bar updated: Step 1 is now complete (marked with a checkmark), and Step 2, 'Select Event', is the current active step. The member information from the previous step is displayed at the top: Member Name: Peafowl, Petunia, SSN: XXX-XX-2175, Member Number: 258350, and Event: Cancel Enrollment. Below this, the text reads 'Please select the event that is triggering this enrollment.' There are four buttons: 'CANCEL ENROLLMENT' (which has a green checkmark and is highlighted by a red arrow with the number '4'), 'CHANGE ENROLLMENT', 'CORRECT ENROLLMENT', and 'INITIAL ENROLLMENT'. At the bottom of the window, there are 'Previous' and 'Next' buttons.

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.

The screenshot shows a modal window titled "Retiree Enrollment" with a close button (X) in the top right corner. A red error banner at the top contains a red exclamation mark icon and the text "Error Invalid Coverage Start Date." Below the banner is a progress bar with five steps: "1 Select Member" (completed with a blue checkmark), "2 Select Event" (active with a blue circle), "3 Select Coverages" (grey circle), "4 Coverage Details" (grey circle), and "5 Review & Confirm" (grey circle).

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

The screenshot shows a modal window titled "Please select the event that is triggering this enrollment." It contains four buttons: "CANCEL ENROLLMENT" (highlighted with a blue border and a green checkmark), "CHANGE ENROLLMENT", "CORRECT ENROLLMENT", and "INITIAL ENROLLMENT". Below the buttons is the "Event Details" section. It includes two date fields: "Event Date*" with the value "03/11/2024" and "Coverage Start Date*" with the value "12/31/2023". A red arrow with the number "5" points to the "Coverage Start Date" field. At the bottom right, another red arrow with the number "5" points to the "Next" button. The "Next" button is highlighted in blue, while the "Previous" button is grey. A "Cancel" button is located at the bottom left.

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

The screenshot shows the 'Retiree Enrollment' window with the 'Select Coverages' step highlighted. The member information is: Member Name: Peafowl, Petunia; SSN: XXX-XX-2175; Member Number: 258350; Event: Cancel Enrollment. Below this, there are two sections for selecting insurance plans. The first section is for 'Medical' coverage, showing a table with columns: Insurance Carrier, Insurance Plan, Plan Coverage, and Premium. The selected option is MEDEX HEALTH, MEDEX (MX), Senior, with a premium of \$189.96. The second section is for 'Second Medical' coverage, also showing a table with the same columns. The selected option is MEDEX HEALTH, MEDEX (MX), Senior, with a premium of \$189.96. At the bottom of the window, there are 'Cancel', 'Previous', and 'Next' buttons. The 'Next' button is highlighted in blue.

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**.

The screenshot shows the 'Retiree Enrollment' window with the 'Coverage Details' step highlighted. The member information is the same as in the previous step. Below this, there is a table for selecting start and stop dates for enrollment. The table has columns: Actions, New or Existing?, Carrier / Plan / Coverage Option, Coverage Start Date, and Coverage Stop Date. There are six rows of existing coverage. The first row is highlighted, and the 'Coverage Stop Date' is set to 12/31/2023. A red arrow with the number 7 points to this date. At the bottom of the window, there are 'Cancel', 'Previous', and 'Next' buttons. The 'Next' button is highlighted in blue. Another red arrow with the number 7 points to the 'Next' button.

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

Retiree Enrollment

Progress: Select Member ✓ Select Event ✓ Select Coverages ✓ Coverage Details ✓ Review & Confirm 8

Please review and confirm the Enrollment details.

Member Info

Member Name	SSN	Member Number	Event
Peafowl, Petunia	XXX-XX-2175	258350	Cancel Enrollment

Premium Info

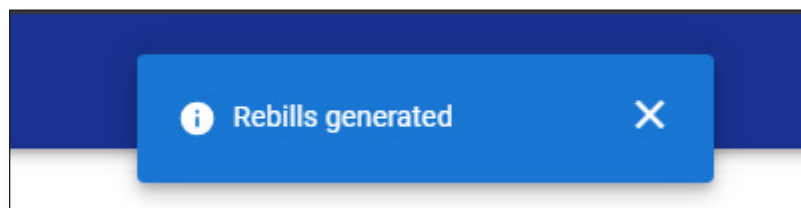
New Cost	Previous Cost
Standard Member Premium \$197.63	Standard Member Premium \$387.59

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	\$330.74
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2022	06/30/2023	\$832.15
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2020	06/30/2022	\$771.45

Buttons: Cancel Previous **Confirm**

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**.

Member Insurance Maintenance

Search: Peafowl, pet

SSN	Member Number	Member Name	Coverage Type	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premium Amount
XXX-XX-2175	258350	Peafowl, Petunia	Second Medical	MEDEX (MX)	Senior	01/01/2024		\$197.63
XXX-XX-2175	258350	Peafowl, Petunia	Medical	MEDEX (MX)	Senior	12/01/2023	12/31/2023	\$189.96
XXX-XX-2175	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Individual	07/01/2023	11/30/2023	\$330.74
XXX-XX-2175	258350	Peafowl, Petunia	Second Medical	MEDEX (MX)	Senior	07/01/2023	12/31/2023	\$189.96
XXX-XX-2175	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Family	07/01/2022	06/30/2023	\$832.15
XXX-XX-2175	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Family	07/01/2020	06/30/2022	\$771.45
XXX-XX-2175	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Individual	07/01/2019	06/30/2020	\$280.33

- 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**.

The screenshot shows the 'Retiree Enrollment' window with a progress bar at the top indicating five steps: 1. Select Member, 2. Select Event, 3. Select Coverages, 4. Coverage Details, and 5. Review & Confirm. A search bar contains the text 'pea' with a red arrow pointing to it labeled '2'. Below the search bar is a table of members.

Member Name	SSN	Member Number	Status
<input type="radio"/> ALBATROSS, AMY	XXX-XX-4579	192667	Retired
<input type="radio"/> ANHINGA, ALICE	XXX-XX-2138	951700	Active
<input type="radio"/> BLACKBIRD, BARBARA	XXX-XX-5174	144655	Retired
<input type="radio"/> BLUE JAY, BONNIE	XXX-XX-2844	211699	Retired
<input type="radio"/> BUDGERIGAR, HELEN	XXX-XX-3714	136979	Deceased
<input type="radio"/> BULFINCH, BETTY	XXX-XX-8133	959349	Active
<input type="radio"/> CASSAWARIES, CHRIS	XXX-XX-5932	126245	Retired
<input type="radio"/> CUCKOOS, DIANE	XXX-XX-4886	343773	Retired
<input type="radio"/> DOVE, DEB E	XXX-XX-7668	956333	Inactive
<input type="radio"/> FALCON, FRANK	XXX-XX-4464	247600	Retired
<input type="radio"/> GOLDFINCH, JENNA	XXX-XX-8744	78314	Deceased

Buttons for 'Cancel' and 'Next' are at the bottom of the window.

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

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

This screenshot shows the same 'Retiree Enrollment' window. The search bar still contains 'pea'. The table now shows only two members: 'PEAFOWL, PETUNIA' and 'PUFFIN, PEARL'. The radio button next to 'PEAFOWL, PETUNIA' is selected, indicated by a red arrow labeled '3'. The 'Next' button at the bottom right is also highlighted with a red arrow labeled '3'.

Member Name	SSN	Member Number	Status
<input checked="" type="radio"/> PEAFOWL, PETUNIA	XXX-XX-2175	258350	Retired
<input type="radio"/> PUFFIN, PEARL	XXX-XX-9034	908952	Active

4. Click **Change Enrollment**.

Retiree Enrollment

1 Select Member 2 Select Event 3 Select Coverages 4 Coverage Details 5 Review & Confirm

Member Name: Peafowl, Petunia SSN: XXX-XX-2175 Member Number: 258350 Event: Change Enrollment

Please select the event that is triggering this enrollment.

CANCEL ENROLLMENT CHANGE ENROLLMENT CORRECT ENROLLMENT INITIAL ENROLLMENT

Event Details

Event Date*

Cancel Previous Next

Stop Date	Premium Amount
12/31/2023	\$197.63
11/30/2023	\$189.96
12/31/2023	\$330.74
06/30/2023	\$189.96
06/30/2022	\$832.15
06/30/2022	\$771.45
06/30/2020	\$280.33
06/30/2019	\$301.43

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

1 Select Member 2 Select Event 3 Select Coverages 4 Coverage Details 5 Review & Confirm

Error

Invalid Coverage Start Date.

Select Member Select Event Select Coverages Coverage Details Review & Confirm

Retiree Enrollment

Step 2: Select Event

Member Name

Peafowl, Petunia

SSN

XXX-XX-2175

Member Number

258350

Event

Change Enrollment

Please select the event that is triggering this enrollment.

CANCEL ENROLLMENT

CHANGE ENROLLMENT

CORRECT ENROLLMENT

INITIAL ENROLLMENT

Event Details

Event Date*

03/11/2024

Coverage Start Date*

01/01/2024

Cancel

Previous

Next

- ### Retiree Enrollment

✓ Select Member →
 ✓ Select Event →
 1 Select Coverages →
 4 Coverage Details →
 5 Review & Confirm

Member Name Pearflow, Petunis	SSN XXX-XX-2175	Member Number 258350	Event Change Enrollment
----------------------------------	--------------------	-------------------------	----------------------------

Select the Plan and Plan Coverage from the options below.

Medical	Insurance Carrier	Insurance Plan	Plan Coverage	Premium
<input type="radio"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Survivor	\$17.50
<input type="radio"/>	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Survivor	\$0.01
<input type="radio"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	\$944.38
<input type="radio"/>	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	\$886.33
<input type="radio"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	\$406.36
<input type="radio"/>	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	\$330.74
<input checked="" type="radio"/>	MEDEX HEALTH	MEDEX (MX)	Senior	\$1
<input type="radio"/>	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	\$3

Cancel
Previous Next

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.

Retiree Enrollment

Progress: 1. Select Member, 2. Select Event, 3. Select Coverages, 4. Coverage Details, 5. Review & Confirm

Member Name: Peafowl, Petunia | SSN: XXX-XX-2175 | Member Number: 258350 | Event: Change Enrollment

Please choose the appropriate start and stop dates for your enrollment selections

Actions	New or Existing?	Carrier / Plan / Coverage Option	Coverage Start Date	Coverage Stop Date
	New Coverage	MEDEX HEALTH/MEDEX (MX)/Senior	01/01/2024	
Delete	Existing Coverage	MEDEX HEALTH/MEDEX (MX)/Senior	12/01/2023	12/31/2023
Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HMO BLUE (HB)/Individual	07/01/2023	11/30/2023
Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HMO BLUE (HB)/Family	07/01/2022	06/30/2023
Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HMO BLUE (HB)/Family	07/01/2020	06/30/2022
Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HMO BLUE (HB)/Individual	07/01/2019	06/30/2020
Delete	Existing Coverage	BLUE CROSS BLUE SHIELD/HMO BLUE (HB)/Individual	08/01/2017	06/30/2019

Buttons: Cancel, Previous, Next

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

Confirm

You have selected an effective date that is not the current month. Please verify.

Buttons: Yes, No

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

Retiree Enrollment

Progress: Select Member ✓ Select Event ✓ Select Coverages ✓ Coverage Details ✓ Review & Confirm 5

Please review and confirm the Enrollment details.

Member Info

Member Name Peafowl, Petunia	SSN XXX-XX-2175	Member Number 258330	Event Change Enrollment
---------------------------------	--------------------	-------------------------	----------------------------

Premium Info

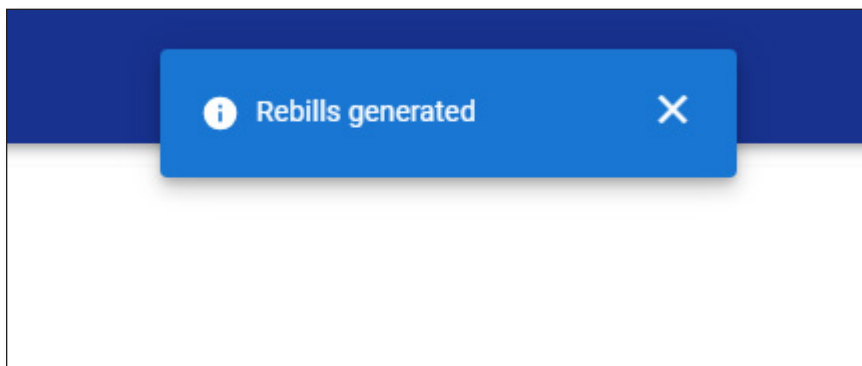
New Cost Standard Member Premium \$395.26	Previous Cost Standard Member Premium \$387.59
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Enrolled Plans

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
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	\$301.43
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2022	06/30/2023	\$832.15

Buttons: Cancel Previous **Confirm**

Another Rebills generated message will appear:



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

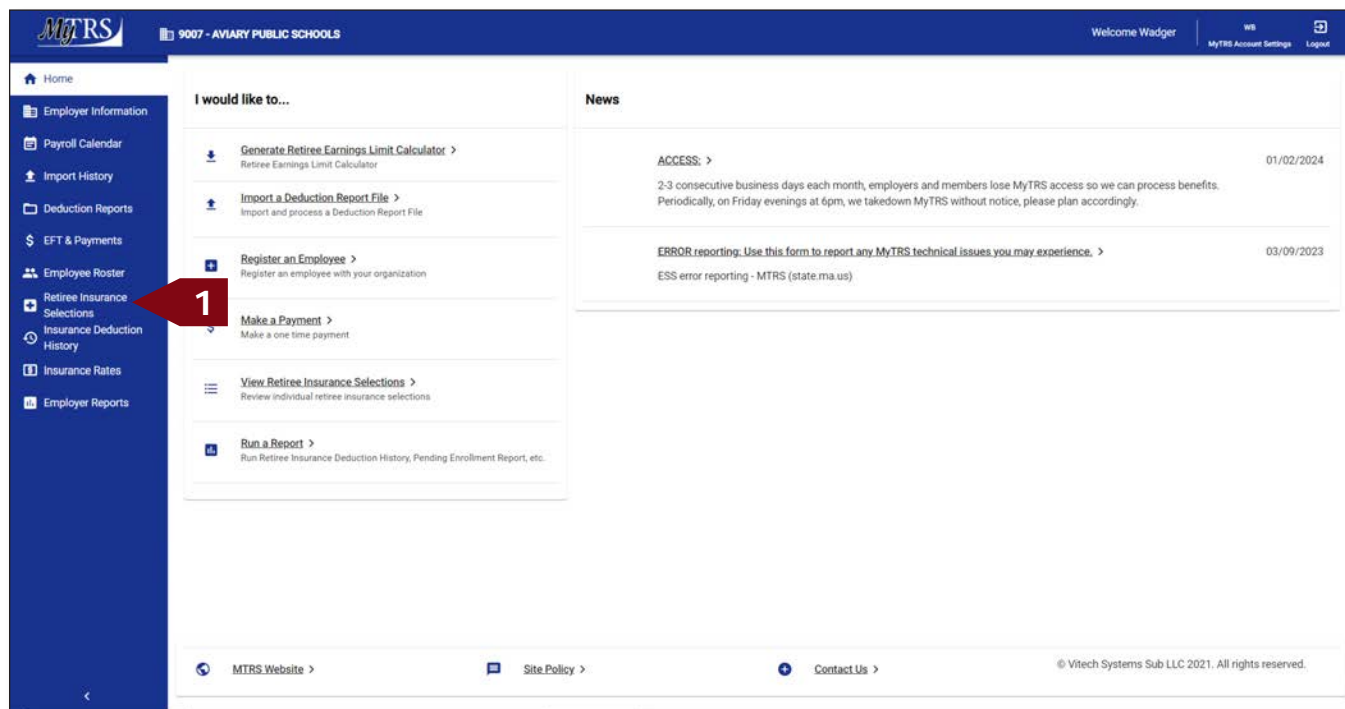
SSN	Member Number	Member Name	Coverage Type	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premium Amount
XXX-XX-2175 >	258350	Peafowl, Petunia	Medical	MEDEX (MX)	Senior	01/01/2024		\$197.63
XXX-XX-2175 >	258350	Peafowl, Petunia	Second Medical	MEDEX (MX)	Senior	01/01/2024		\$197.63
XXX-XX-2175 >	258350	Peafowl, Petunia	Medical	MEDEX (MX)	Senior	12/01/2023	12/31/2023	\$189.96
XXX-XX-2175 >	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Individual	07/01/2023	11/30/2023	\$330.74
XXX-XX-2175 >	258350	Peafowl, Petunia	Second Medical	MEDEX (MX)	Senior	07/01/2023	12/31/2023	\$189.96
XXX-XX-2175 >	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Family	07/01/2022	06/30/2023	\$832.15
XXX-XX-2175 >	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Family	07/01/2020	06/30/2022	\$771.45
XXX-XX-2175 >	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Individual	07/01/2019	06/30/2020	\$280.33
XXX-XX-2175 >	258350	Peafowl, Petunia	Medical	HMO BLUE (HB)	Individual	08/01/2017	06/30/2019	\$301.43

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.

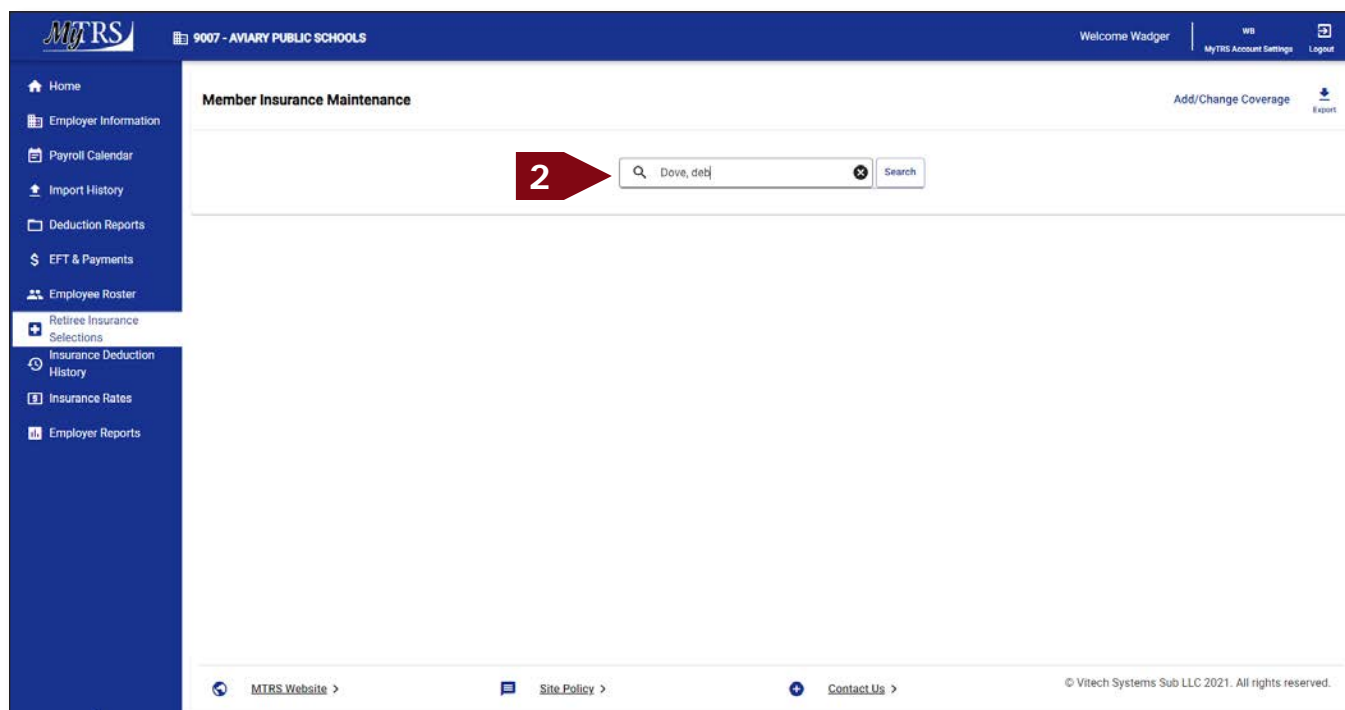
Chapter 8—Correct Enrollments

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.

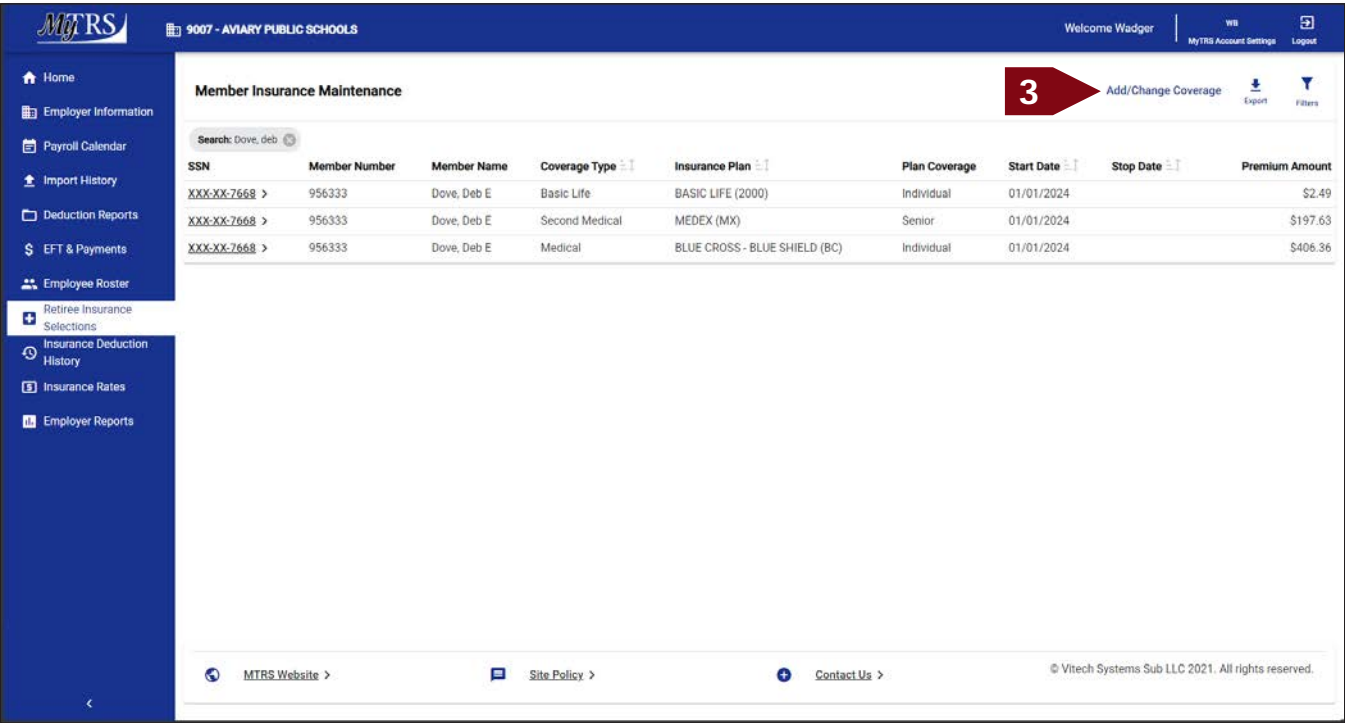


2. Enter the retiree's name (last, first), MTRS member number or Social Security number (SSN) in the search field and press **Enter** on your keyboard or click **Search**.

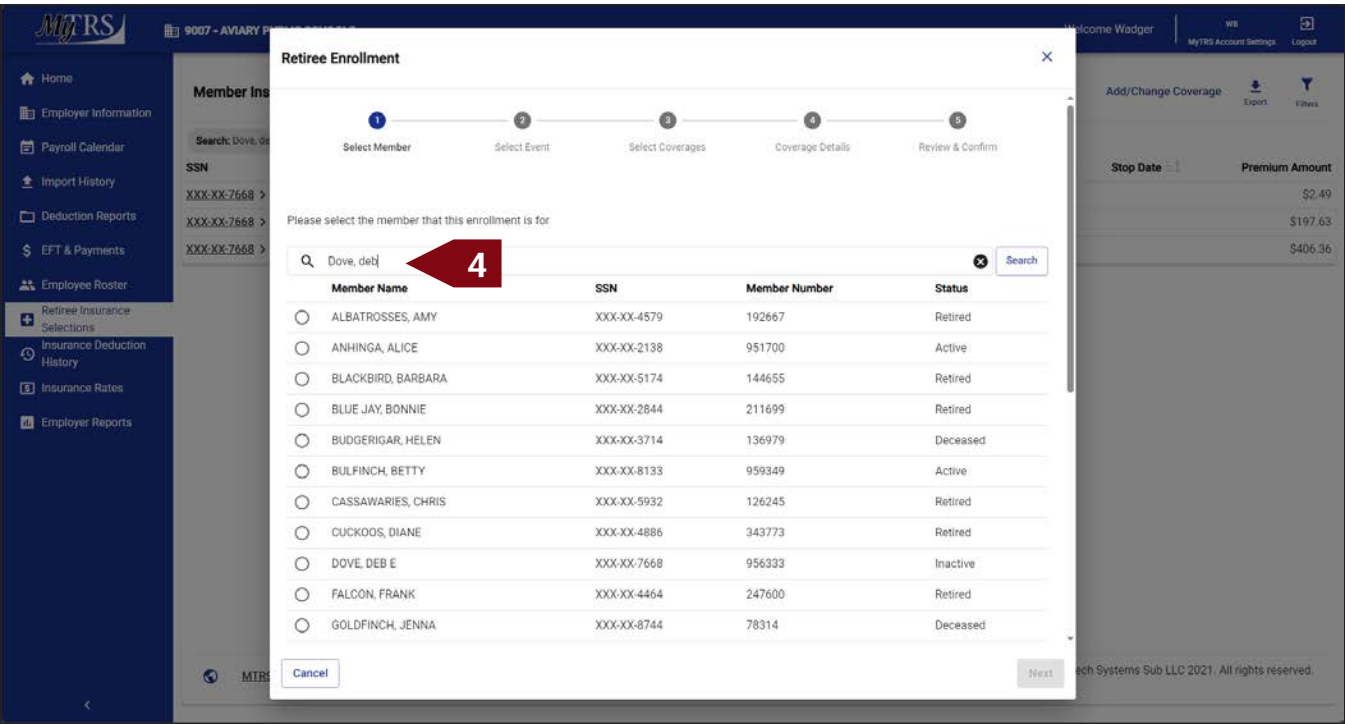


3. Please review your retiree’s current insurance coverages before making any changes.

Click **Add /Change Coverage**.



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**.



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**.

The screenshot shows the 'Retiree Enrollment' modal window with a progress bar at the top indicating five steps: 1. Select Member, 2. Select Event, 3. Select Coverages, 4. Coverage Details, and 5. Review & Confirm. Step 1 is currently active. Below the progress bar, the text reads 'Please select the member that this enrollment is for'. A search bar contains the text 'Dove, deb'. Below the search bar is a table with the following data:

Member Name	SSN	Member Number	Status
DOVE, DEB E	XXX-XX-7668	956333	Inactive

A red arrow with the number '5' points to the radio button next to the member 'DOVE, DEB E'. At the bottom right of the modal, a blue 'Next' button is visible, also indicated by a red arrow with the number '5'. A 'Cancel' button is at the bottom left.

6. Click **Correct Enrollment**.

The screenshot shows the 'Retiree Enrollment' modal window at Step 2: Select Event. The progress bar at the top shows Step 1 as completed and Step 2 as active. The member information from Step 1 is displayed at the top: Member Name 'Dove, Deb E', SSN 'XXX-XX-7668', and Member Number '956333'. Below this, the text reads 'Please select the event that is triggering this enrollment.' There are four buttons: 'CANCEL ENROLLMENT', 'CHANGE ENROLLMENT', 'INITIAL ENROLLMENT', and 'CORRECT ENROLLMENT'. The 'CORRECT ENROLLMENT' button is highlighted with a green checkmark and a red arrow with the number '6'. At the bottom, there is an 'Event Date*' field and 'Previous' and 'Next' buttons. A 'Cancel' button is at the bottom left.

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 to 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.

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

7. On the *Select Coverages* page, click **Next**. (Nothing is changing here.)

Retiree Enrollment

Progress: 1. Select Member, 2. Select Event, 3. **Select Coverages**, 4. Coverage Details, 5. Review & Confirm

Member Name: Dove, Deb E | SSN: XXX-XX-7668 | Member Number: 956333 | Event: Correct Enrollment

Select the Plan and Plan Coverage from the options below.

Medical	Insurance Carrier	Insurance Plan	Plan Coverage	Premium
<input checked="" type="radio"/>	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual	\$406.36

Second Medical	Insurance Carrier	Insurance Plan	Plan Coverage	Premium
<input checked="" type="radio"/>	MEDEX HEALTH	MEDEX (MX)	Senior	\$197.63

Basic Life	Insurance Carrier	Insurance Plan	Plan Coverage	Premium
<input checked="" type="radio"/>	BASIC LIFE	BASIC LIFE (2000)	Individual	\$2.49

7 (Red arrow pointing to Next button)

Buttons: Cancel, Previous, **Next**

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

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**.

Retiree Enrollment

Progress: 1. Select Member, 2. Select Event, 3. Select Coverages, 4. **Coverage Details**, 5. Review & Confirm

Member Name: Dove, Deb E | SSN: XXX-XX-7668 | Member Number: 956333 | Event: Correct Enrollment

Please choose the appropriate start and stop dates for your enrollment selections

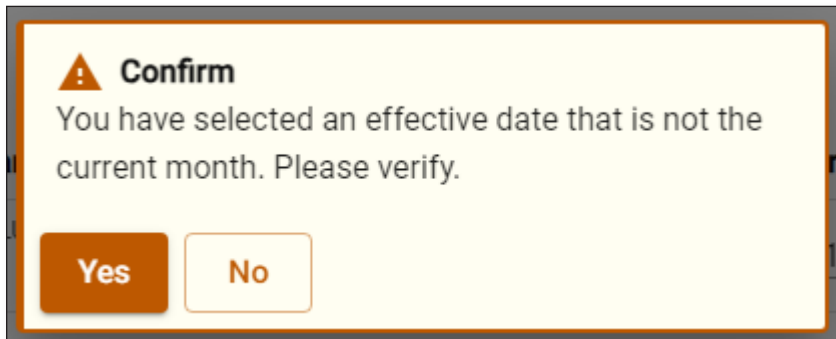
Medical	Actions	New or Existing?	Carrier / Plan / Coverage Option	Coverage Start Date	Coverage Stop Date
		New Coverage	BLUE CROSS BLUE SHIELD/BLUE CROSS - BLUE SHIELD (BC)/Individual	02/01/2024	

Second Medical	Actions	New or Existing?	Carrier / Plan / Coverage Option	Coverage Start Date	Coverage Stop Date
		New Coverage	MEDEX HEALTH/MEDEX (MX)/Senior	02/01/2024	

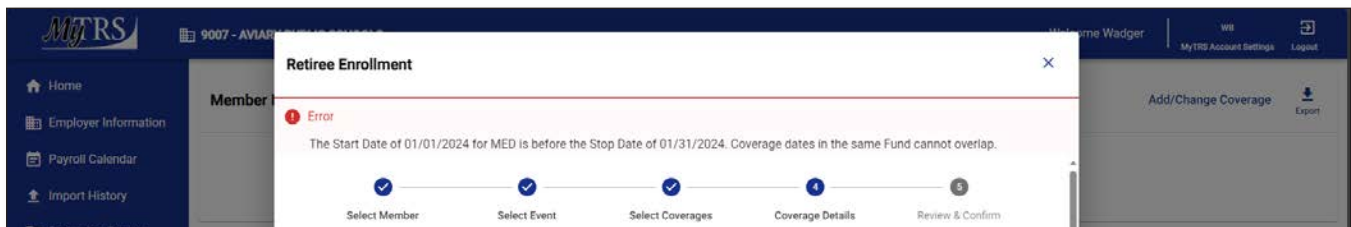
Basic Life	Actions	New or Existing?	Carrier / Plan / Coverage Option	Coverage Start Date	Coverage Stop Date
		New Coverage	BASIC LIFE/BASIC LIFE (2000)/Individual	02/01/2024	

Buttons: Cancel, Previous, **Next**

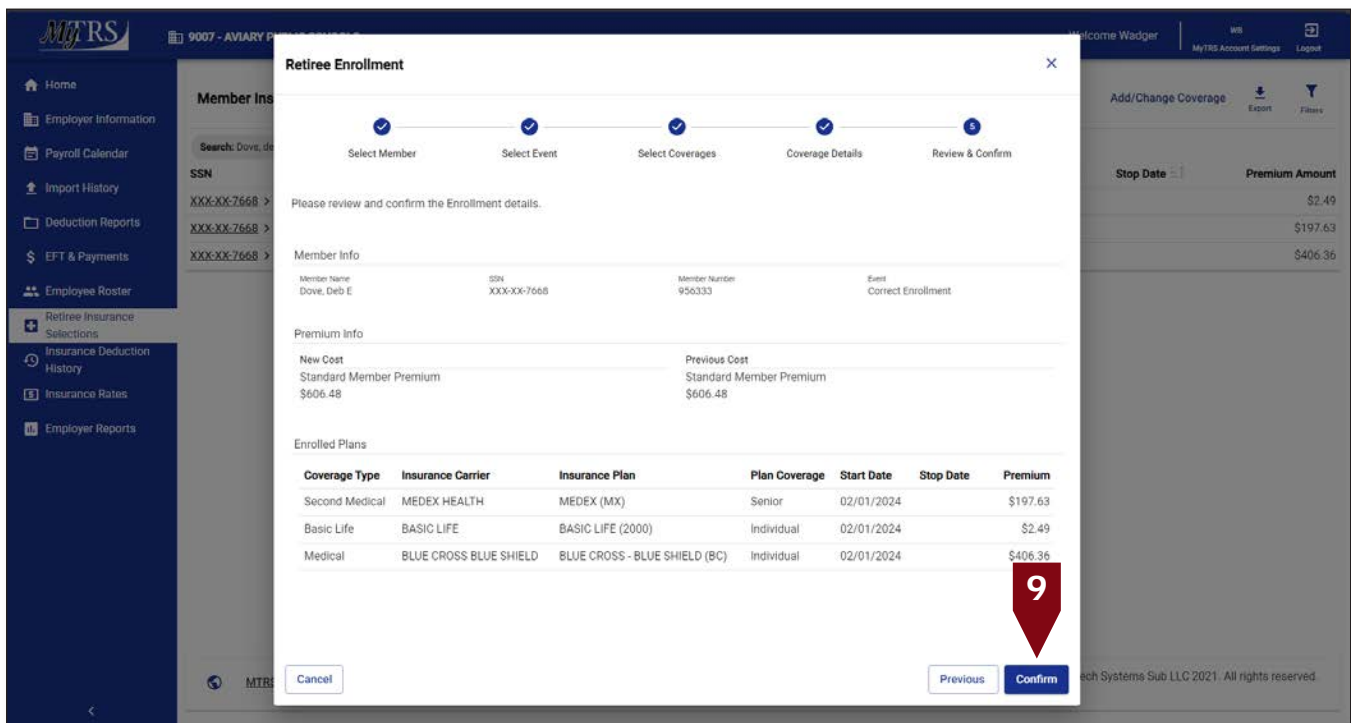
If the coverage change you are making requires a retroactive period, this message is displayed, click Yes.



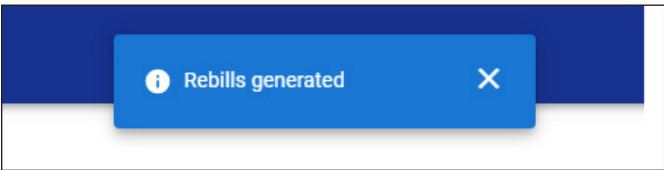
For an example where the correction is to existing coverage and new coverage is being set to an earlier start date, not fixing the corresponding stop date for the earlier plan will result in this error message.



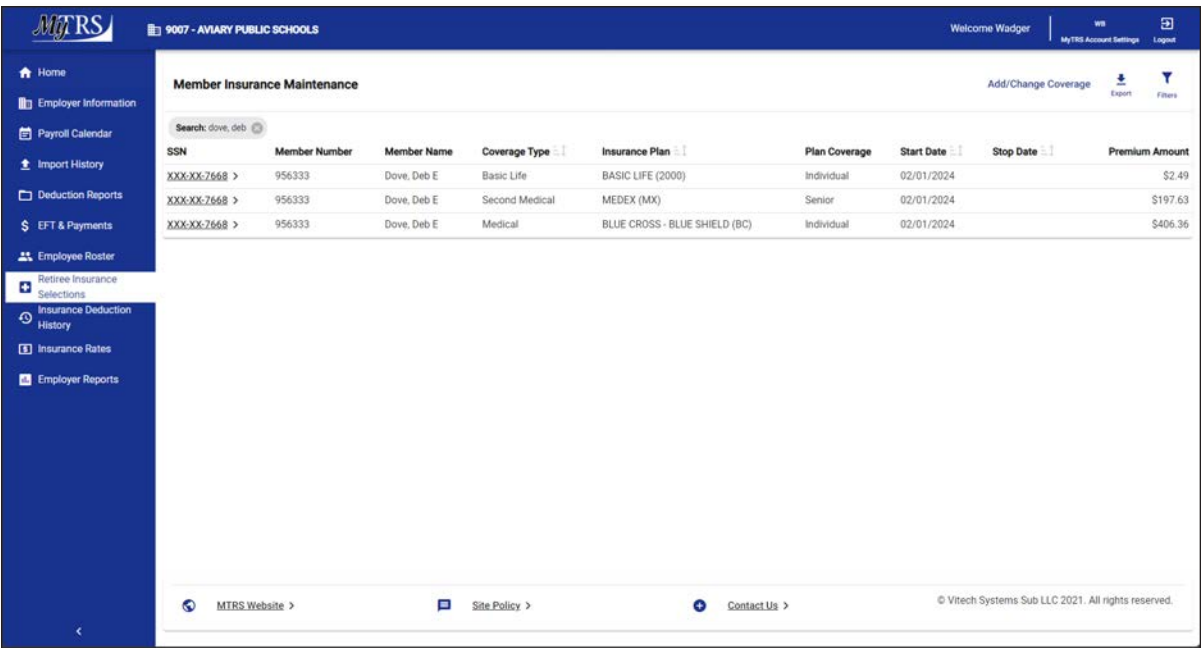
9. On the *Review & Confirm* page, click **Confirm**.



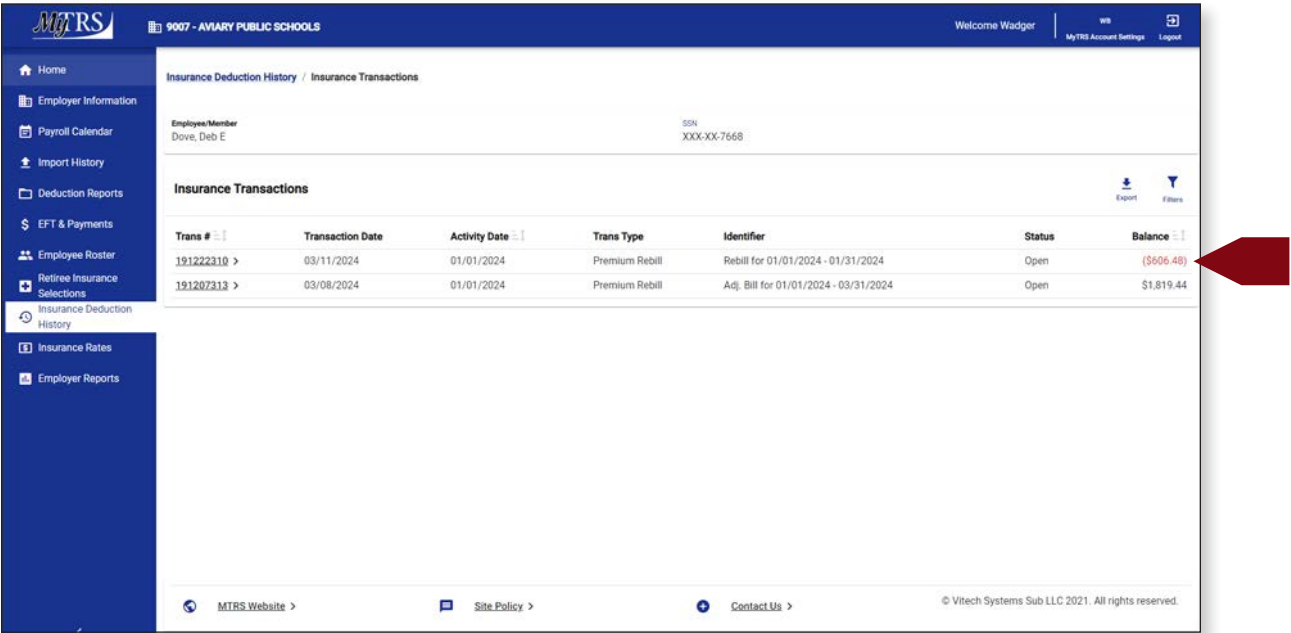
A rebill will be generated.



Now your correction is complete.



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.

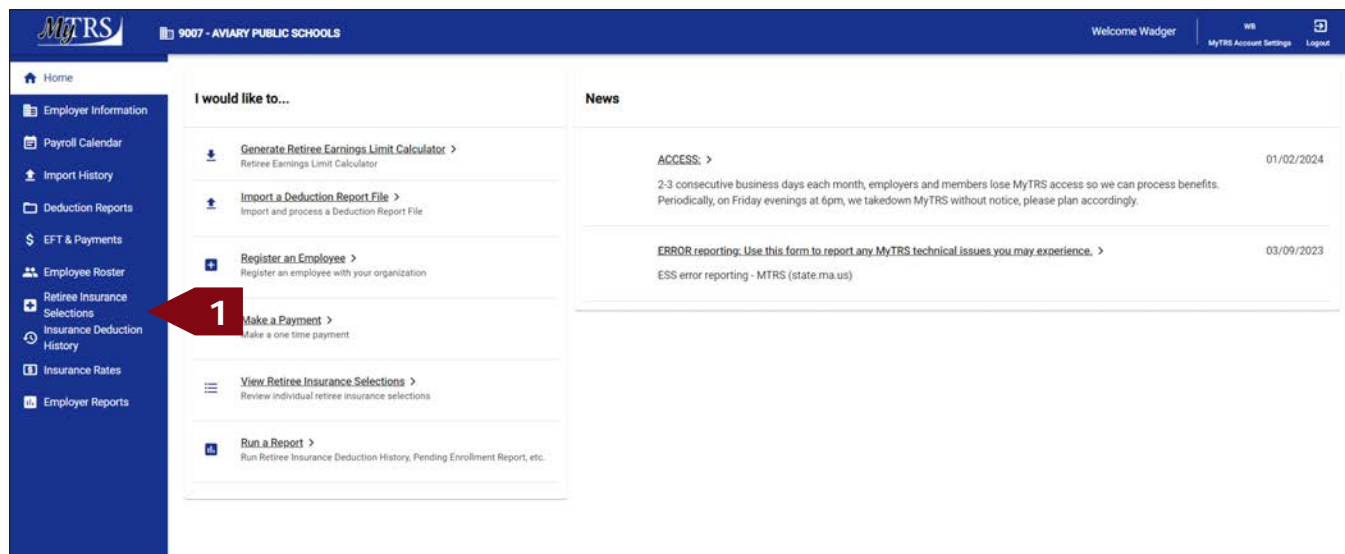


Chapter 9—Cancel Enrollments

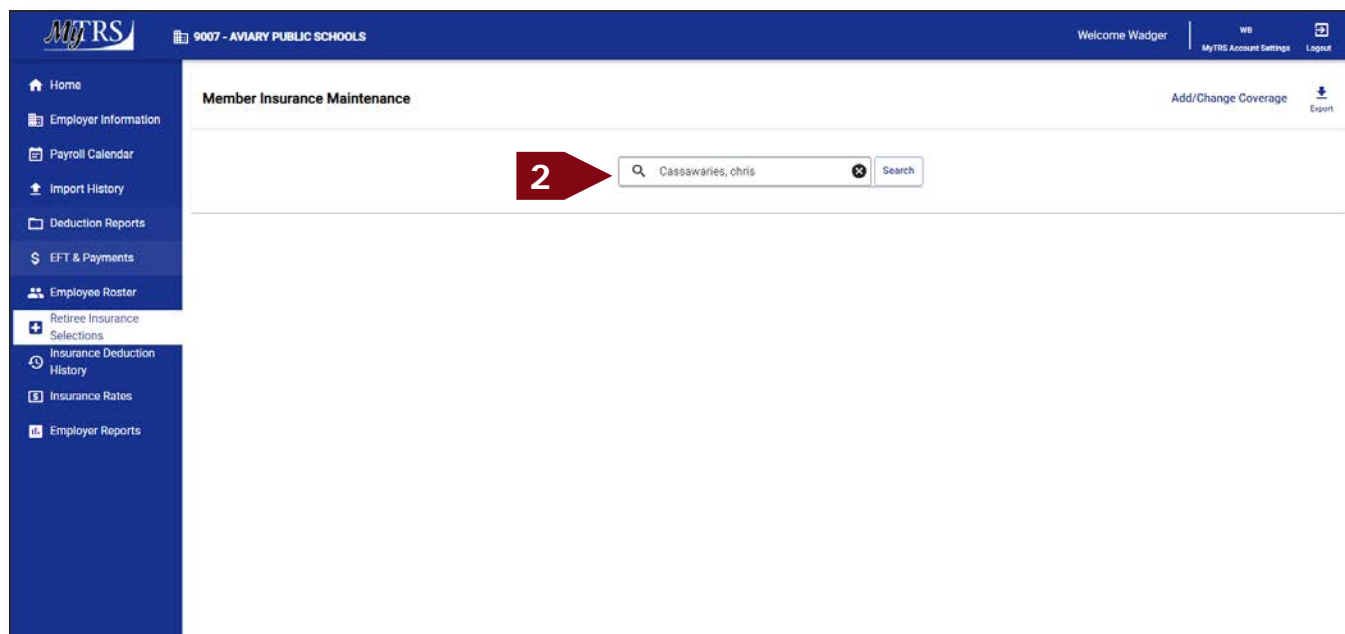
In the case of a death for a retiree, please see the required procedure mentioned in the Retiree Insurance Guidelines in Chapter 2 of this guide.

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

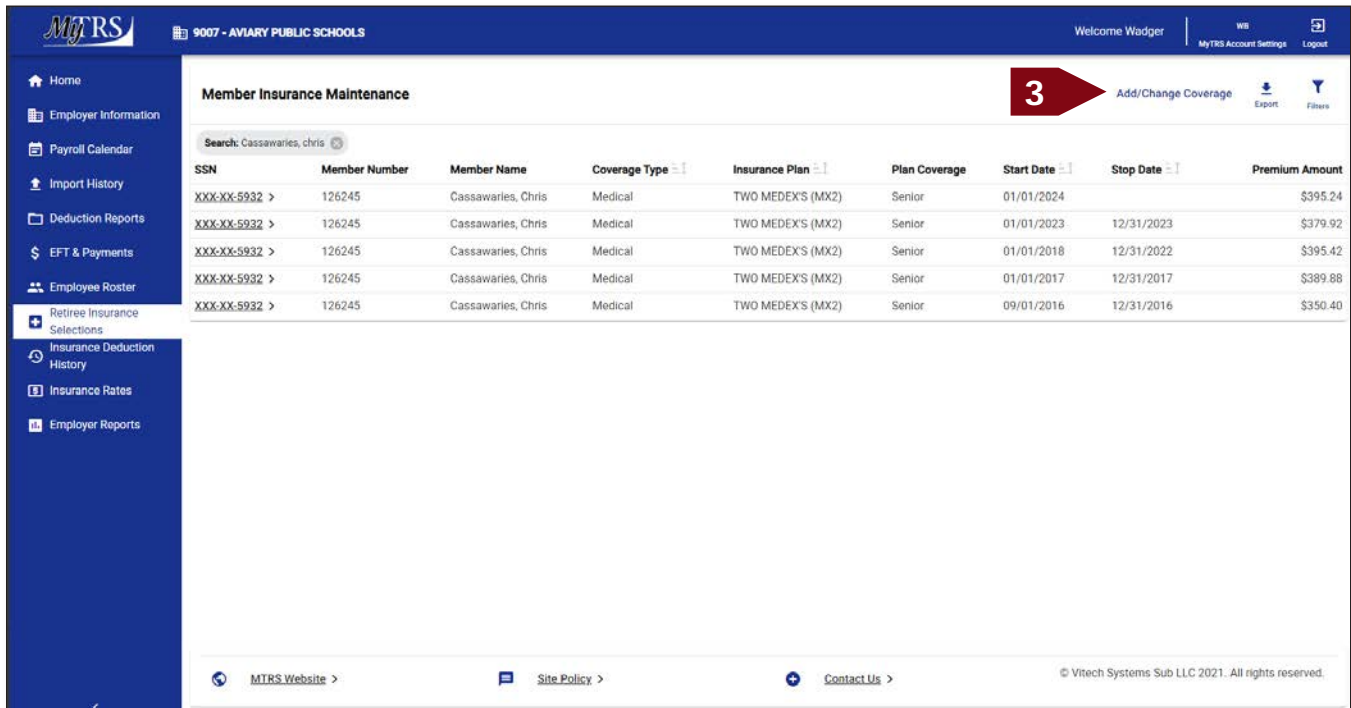
1. Click **Retiree Insurance Selections** from the *Left navigation* menu on the *Home* page.



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 your retiree's coverage before making a change.



3. Click **Add / Change Coverage**.

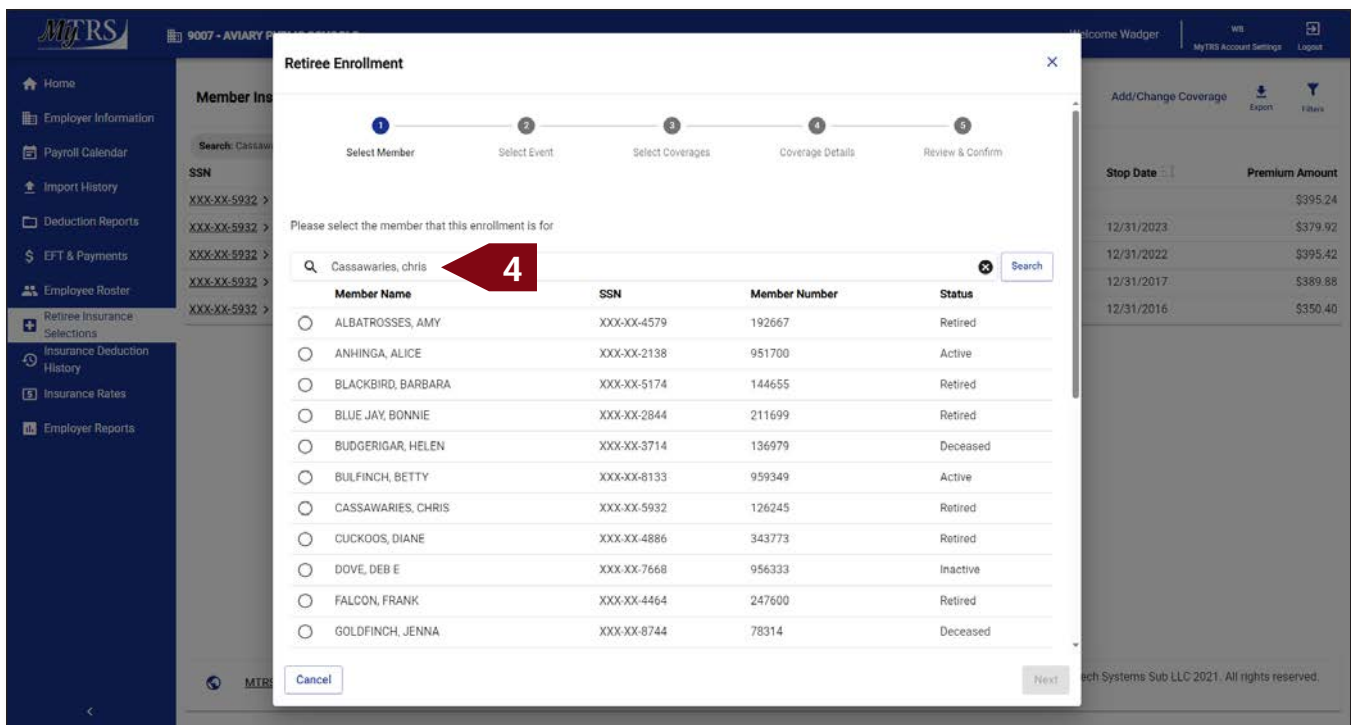


Member Insurance Maintenance

Search: Cassawaries, chris

SSN	Member Number	Member Name	Coverage Type	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premium Amount
XXX-XX-5932 >	126245	Cassawaries, Chris	Medical	TWO MEDEX'S (MX2)	Senior	01/01/2024		\$395.24
XXX-XX-5932 >	126245	Cassawaries, Chris	Medical	TWO MEDEX'S (MX2)	Senior	01/01/2023	12/31/2023	\$379.92
XXX-XX-5932 >	126245	Cassawaries, Chris	Medical	TWO MEDEX'S (MX2)	Senior	01/01/2018	12/31/2022	\$395.42
XXX-XX-5932 >	126245	Cassawaries, Chris	Medical	TWO MEDEX'S (MX2)	Senior	01/01/2017	12/31/2017	\$389.88
XXX-XX-5932 >	126245	Cassawaries, Chris	Medical	TWO MEDEX'S (MX2)	Senior	09/01/2016	12/31/2016	\$350.40

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.



Retiree Enrollment

1 Select Member 2 Select Event 3 Select Coverages 4 Coverage Details 5 Review & Confirm

Please select the member that this enrollment is for

Search: Cassawaries, chris

Member Name	SSN	Member Number	Status
<input type="radio"/> ALBATROSSES, AMY	XXX-XX-4579	192667	Retired
<input type="radio"/> ANHINGA, ALICE	XXX-XX-2138	951700	Active
<input type="radio"/> BLACKBIRD, BARBARA	XXX-XX-5174	144655	Retired
<input type="radio"/> BLUE, JAY, BONNIE	XXX-XX-2844	211699	Retired
<input type="radio"/> BUDGERIGAR, HELEN	XXX-XX-3714	136979	Deceased
<input type="radio"/> BULFINCH, BETTY	XXX-XX-8133	959349	Active
<input type="radio"/> CASSAWARIES, CHRIS	XXX-XX-5932	126245	Retired
<input type="radio"/> CUCKOOS, DIANE	XXX-XX-4886	343773	Retired
<input type="radio"/> DOVE, DEB E	XXX-XX-7668	956333	Inactive
<input type="radio"/> FALCON, FRANK	XXX-XX-4464	247600	Retired
<input type="radio"/> GOLDFINCH, JENNA	XXX-XX-8744	78314	Deceased

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

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

The screenshot shows the 'Retiree Enrollment' modal window with a progress bar at the top indicating five steps: 1. Select Member, 2. Select Event, 3. Select Coverages, 4. Coverage Details, and 5. Review & Confirm. Step 1 is currently active. Below the progress bar, the text 'Please select the member that this enrollment is for' is displayed. A search bar contains the text 'Cassawaries, chris'. Below the search bar is a table with the following data:

Member Name	SSN	Member Number	Status
CASSAWARIES, CHRIS	XXX-XX-5932	126245	Retired

A red arrow with the number '5' points to the radio button next to 'CASSAWARIES, CHRIS'. At the bottom right of the modal, another red arrow with the number '5' points to the 'Next' button. The 'Cancel' button is at the bottom left.

6. Click **Cancel Enrollment**.

The screenshot shows the 'Retiree Enrollment' modal window at Step 2: Select Event. The progress bar at the top shows Step 1 as completed and Step 2 as active. Below the progress bar, the text 'Please select the event that is triggering this enrollment.' is displayed. A table shows the member information from the previous step:

Member Name	SSN	Member Number	Event
Cassawaries, Chris	XXX-XX-5932	126245	Cancel Enrollment

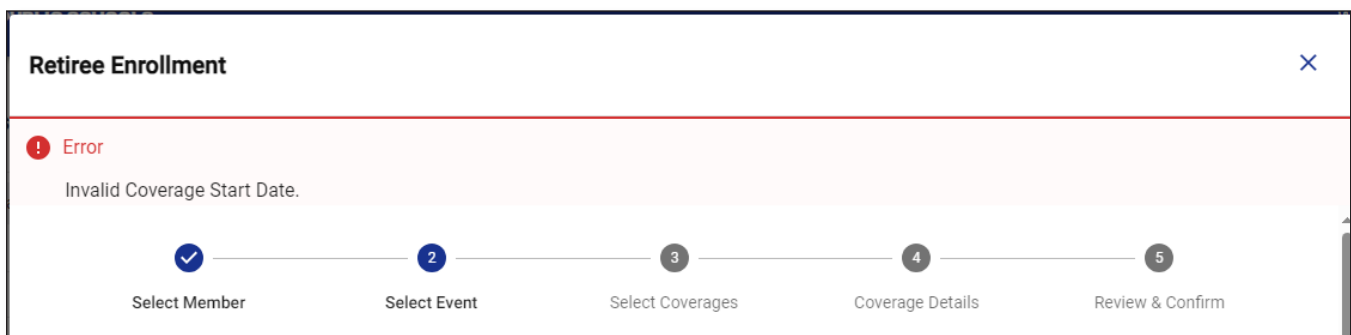
Below the table, four buttons are displayed: 'CANCEL ENROLLMENT' (highlighted with a red arrow and a green checkmark), 'CHANGE ENROLLMENT', 'CORRECT ENROLLMENT', and 'INITIAL ENROLLMENT'. At the bottom of the modal, there are 'Cancel', 'Previous', and 'Next' buttons.

The following fields will appear:

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

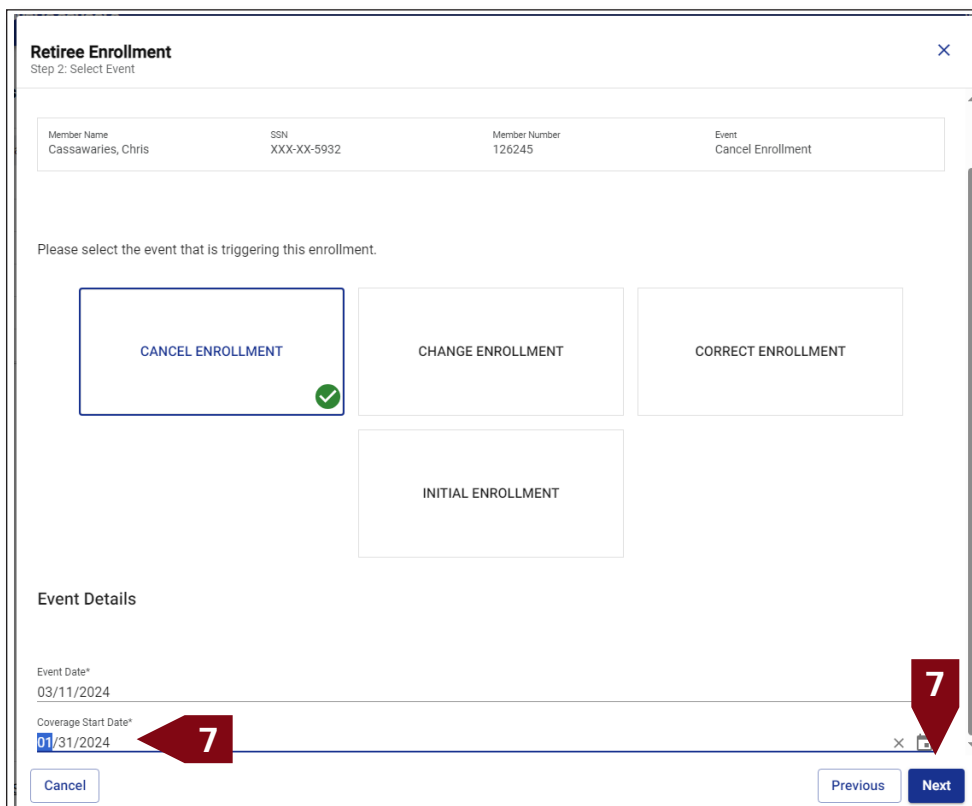
Coverage Start Date— This is the coverage STOP date, so it should be the last day of the coverage month. (e.g., if you want to end coverage for the September 1 premium, the Coverage Start Date should be 8/31).

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.



The screenshot shows a 'Retiree Enrollment' window with a red error banner at the top that reads 'Error' and 'Invalid Coverage Start Date.' Below the banner is a progress bar with five steps: 1. Select Member (checked), 2. Select Event, 3. Select Coverages, 4. Coverage Details, and 5. Review & Confirm.

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



The screenshot shows the 'Retiree Enrollment' window at 'Step 2: Select Event'. It displays member information: Member Name (Cassawaries, Chris), SSN (XXX-XX-5932), Member Number (126245), and Event (Cancel Enrollment). Below this, it asks to 'Please select the event that is triggering this enrollment.' There are four buttons: 'CANCEL ENROLLMENT' (highlighted with a green checkmark), 'CHANGE ENROLLMENT', 'CORRECT ENROLLMENT', and 'INITIAL ENROLLMENT'. Under 'Event Details', the 'Event Date*' is 03/11/2024 and the 'Coverage Start Date*' is 01/31/2024. A red arrow labeled '7' points to the 'Coverage Start Date' field. At the bottom right, another red arrow labeled '7' points to the 'Next' button. There are also 'Cancel', 'Previous', and 'Next' buttons at the bottom.

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

Medical	Insurance Carrier	Insurance Plan	Plan Coverage	Premium
<input checked="" type="radio"/>	MEDEX HEALTH	TWO MEDEX (MX2)	Senior	\$395.24

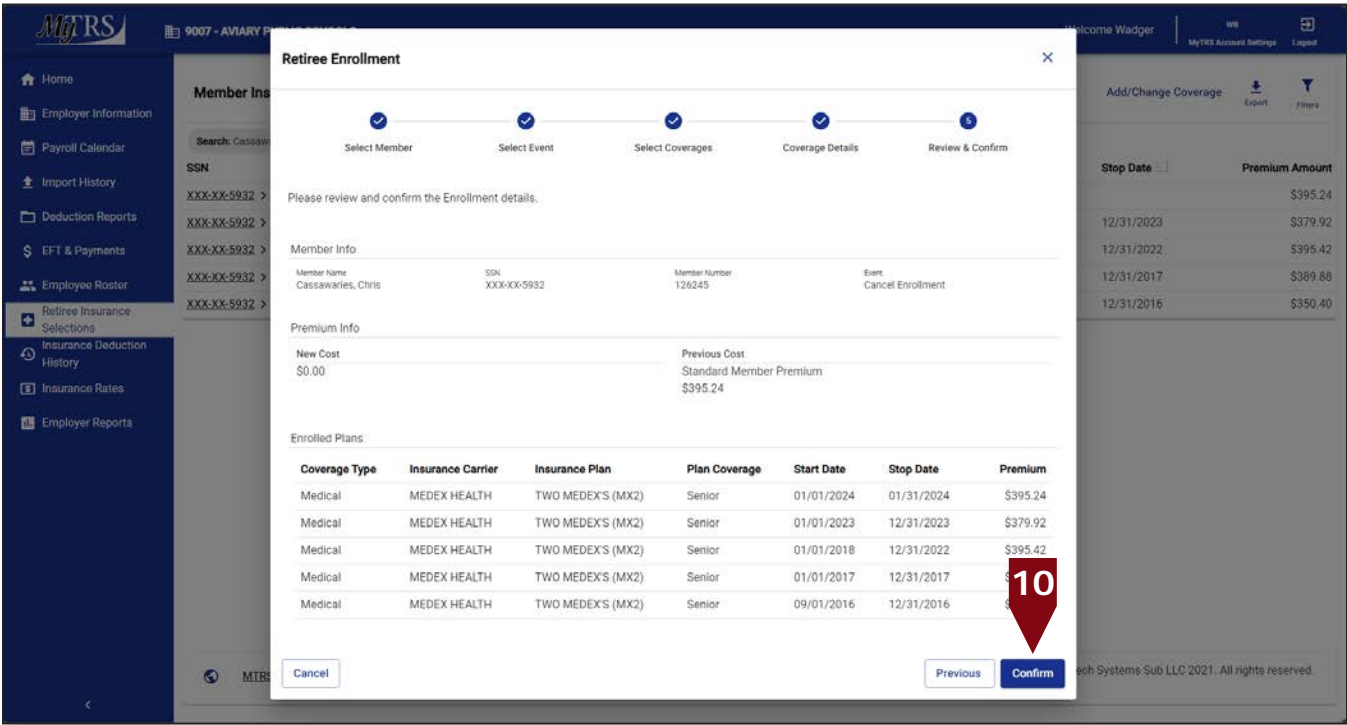
9. On the *Coverage Details* page, enter the appropriate Coverage Stop Date on the coverage that is ending. This should be the last day of the coverage month. (e.g., if you want to end coverage for the February 1 premium, the Coverage Stop Date should be 01/31).

- 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.

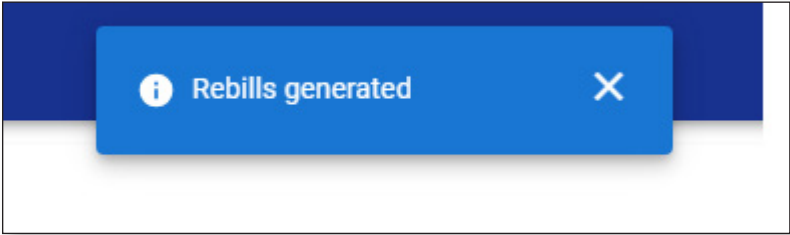
Click **Next**

Medical	Actions	New or Existing?	Carrier / Plan / Coverage Option	Coverage Start Date	Coverage Stop Date
<input checked="" type="radio"/>	Delete	Existing Coverage	MEDEX HEALTH/TWO MEDEX (MX2)/Senior	01/01/2024	01/31/2024
<input checked="" type="radio"/>	Delete	Existing Coverage	MEDEX HEALTH/TWO MEDEX (MX2)/Senior	01/01/2023	12/31/2023
<input checked="" type="radio"/>	Delete	Existing Coverage	MEDEX HEALTH/TWO MEDEX (MX2)/Senior	01/01/2018	12/31/2022
<input checked="" type="radio"/>	Delete	Existing Coverage	MEDEX HEALTH/TWO MEDEX (MX2)/Senior	01/01/2017	12/31/2017
<input checked="" type="radio"/>	Delete	Existing Coverage	MEDEX HEALTH/TWO MEDEX (MX2)/Senior	09/01/2016	12/31/2016

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.

Member Insurance Maintenance

Search: Cassawaries, chris

SSN	Member Number	Member Name	Coverage Type	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premium Amount
XXX-XX-5932	126245	Cassawaries, Chris	Medical	TWO MEDEX'S (MX2)	Senior	01/01/2024	01/31/2024	\$395.24
XXX-XX-5932	126245	Cassawaries, Chris	Medical	TWO MEDEX'S (MX2)	Senior	01/01/2023	12/31/2023	\$379.92
XXX-XX-5932	126245	Cassawaries, Chris	Medical	TWO MEDEX'S (MX2)	Senior	01/01/2018	12/31/2022	\$395.42
XXX-XX-5932	126245	Cassawaries, Chris	Medical	TWO MEDEX'S (MX2)	Senior	01/01/2017	12/31/2017	\$389.88
XXX-XX-5932	126245	Cassawaries, Chris	Medical	TWO MEDEX'S (MX2)	Senior	09/01/2016	12/31/2016	\$350.40

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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.

Insurance Deduction History / Insurance Transactions

Employee/Member: Cassawaries, Chris | SSN: XXX-XX-5932

Insurance Transactions

Trans #	Transaction Date	Activity Date	Trans Type	Identifier	Status	Balance
191217316	03/11/2024	02/01/2024	Premium Rebill	Rebill for 02/01/2024 - 03/31/2024	Open	(\$790.48)
191123488	02/15/2024	02/15/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
190996768	02/15/2024	03/01/2024	Premium Bill	EBILL for 03/01/2024 - 03/31/2024	Closed	\$0.00
185203460	01/22/2024	01/22/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
185120593	01/22/2024	02/01/2024	Premium Bill	EBILL for 02/01/2024 - 02/29/2024	Closed	\$0.00
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
162448893	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

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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.

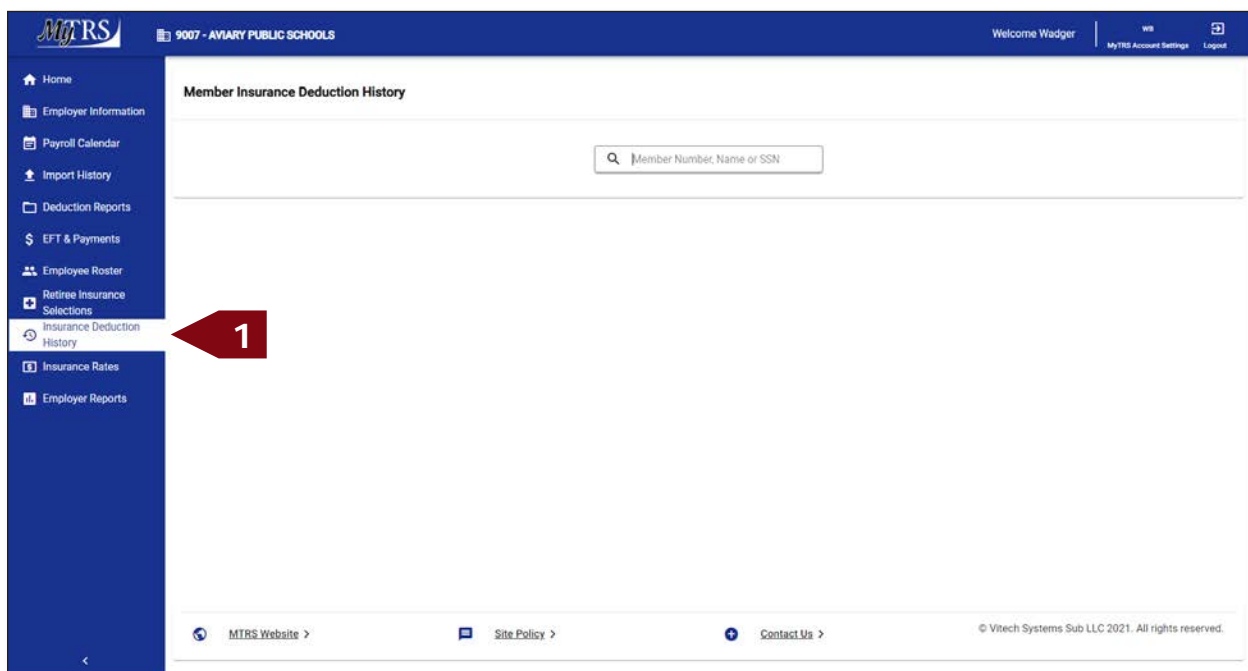
There are 3 types of transactions viewable:

- **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.

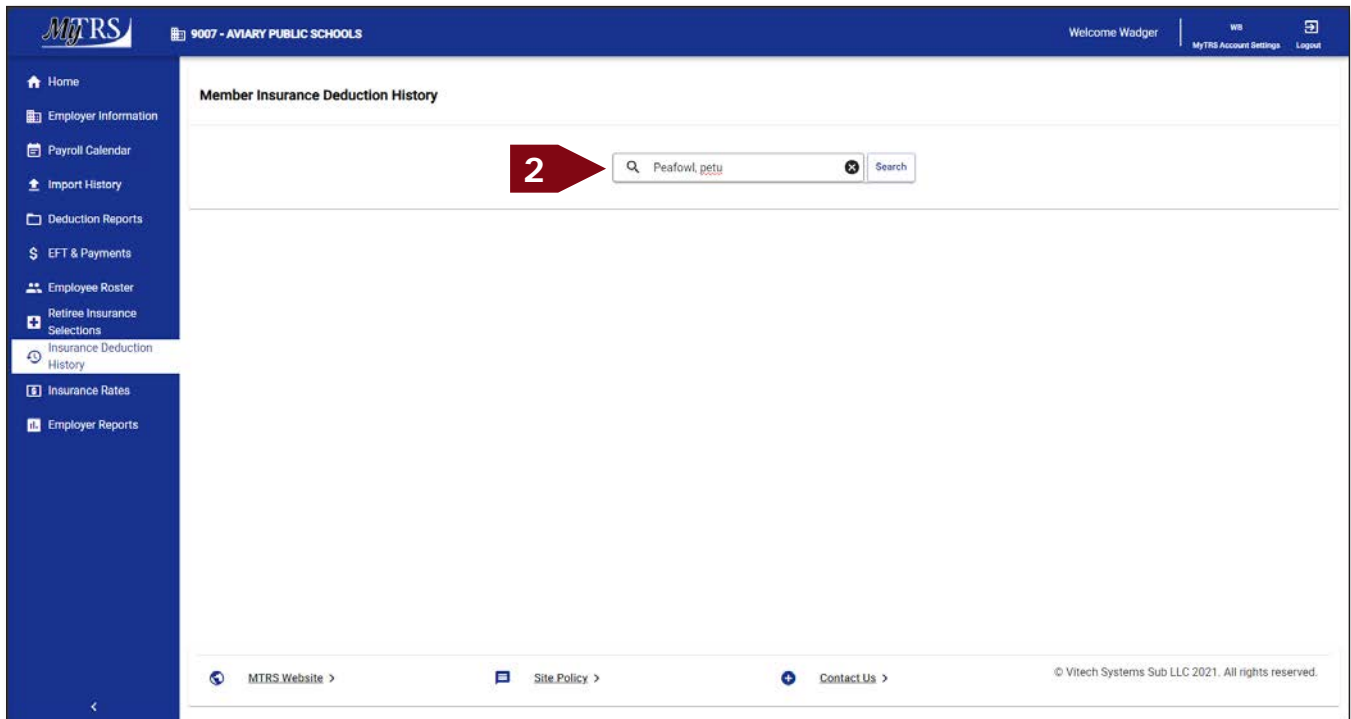
When you make coverage changes that are retroactive it is very important to check the Insurance Deduction History screen to ensure that a rebill has been created and is for the correct amount.

To check a transaction:

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



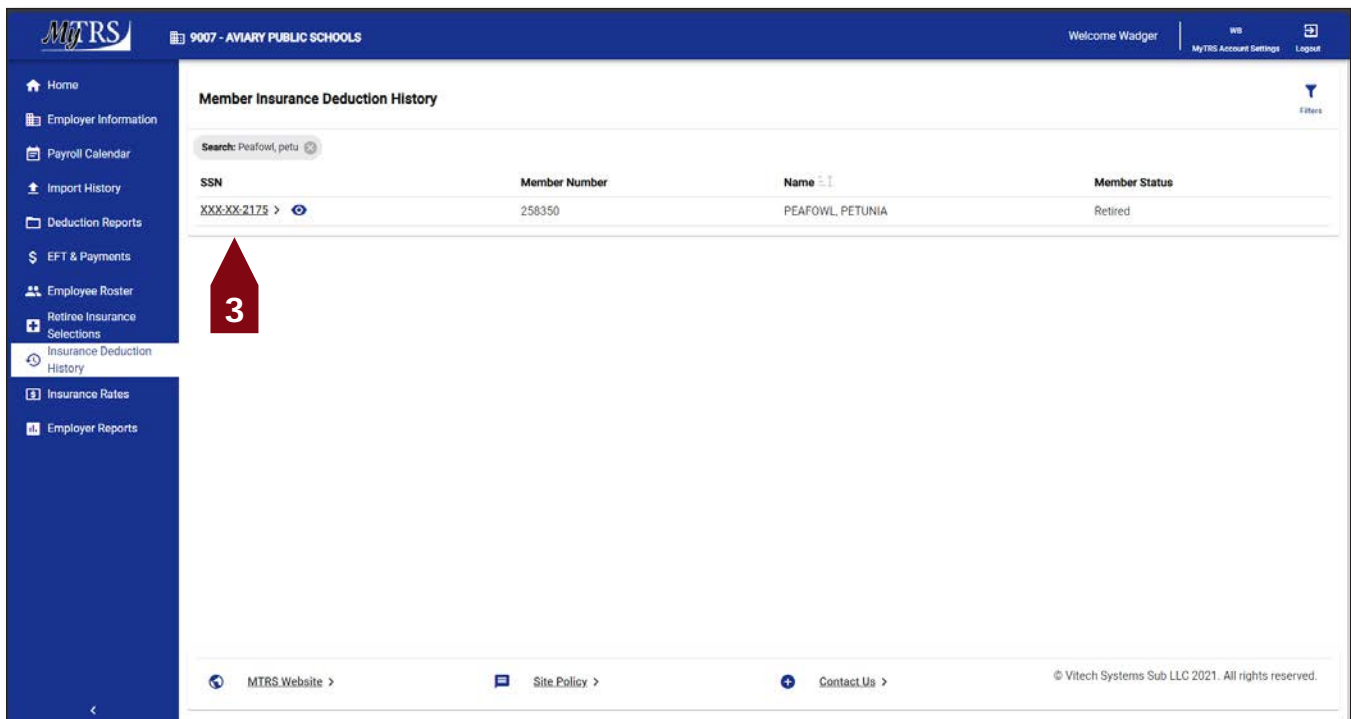
2. Enter the retiree's name (last, first), MTRS member number or Social Security number (SSN) in the Search field and press **Enter** on your keyboard or clicking **Search**.



The screenshot shows the MyTRS web application interface. The top navigation bar includes the MyTRS logo, the text '9007 - AVIARY PUBLIC SCHOOLS', and user information 'Welcome Wadger' with links for 'MyTRS Account Settings' and 'Logout'. A left sidebar contains a menu with options: Home, Employer Information, Payroll Calendar, Import History, Deduction Reports, EFT & Payments, Employee Roster, Retiree Insurance Selections, Insurance Deduction History (highlighted), Insurance Rates, and Employer Reports. The main content area is titled 'Member Insurance Deduction History'. A search bar is present with a red arrow labeled '2' pointing to it. The search bar contains the text 'Peafowl, petu' and a 'Search' button. At the bottom of the page, there are links for 'MTRS Website', 'Site Policy', and 'Contact Us', along with a copyright notice: '© Vitech Systems Sub LLC 2021. All rights reserved.'

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:



The screenshot shows the same MyTRS web application interface as the previous one, but now displaying search results. The search bar still contains 'Peafowl, petu'. Below the search bar, a table lists the search results. A red arrow labeled '3' points to the masked SSN 'XXX-XX-2175' in the first row of the table. The table has four columns: SSN, Member Number, Name, and Member Status. The first row contains the values: 'XXX-XX-2175', '258350', 'PEAFOWL, PETUNIA', and 'Retired'. At the bottom of the page, there are links for 'MTRS Website', 'Site Policy', and 'Contact Us', along with a copyright notice: '© Vitech Systems Sub LLC 2021. All rights reserved.'

SSN	Member Number	Name	Member Status
XXX-XX-2175	258350	PEAFOWL, PETUNIA	Retired

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 #**.

Trans #	Transaction Date	Activity Date	Trans Type	Identifier	Status	Balance
191217310 >	03/11/2024	01/01/2024	Premium Rebill	Rebill for 01/01/2024 - 03/31/2024	Open	\$592.89
191212313 >	03/11/2024	01/01/2024	Premium Rebill	Rebill for 01/01/2024 - 03/31/2024	Open	(\$592.89)
191212310 >	03/11/2024	12/01/2023	Premium Rebill	Rebill for 12/01/2023 - 03/31/2024	Open	(\$540.11)
191116902 >	02/15/2024	02/15/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
191116901 >	02/15/2024	02/15/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
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
173957763 >	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

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

The screenshot shows the MyTRS interface for 9007 - AVIARY PUBLIC SCHOOLS. The left sidebar contains navigation links: Home, Employer Information, Payroll Calendar, Import History, Deduction Reports, EFT & Payments, Employee Roster, Retiree Insurance Selections, Insurance Deduction History (selected), Insurance Rates, and Employer Reports. The main content area displays the 'Insurance Deduction History / Insurance Transactions / Transaction Details' page. It includes a 'Transaction Summary' table and a 'Transaction Details' table.

Activity Date	Trans #	Trans Type	Trans Identifier	Status	Balance
01/01/2024	191212313	Premium Rebill	Rebill for 01/01/2024 - 03/31/2024	Open	(\$592.89)

Activity Date	Type	Total Amount	Medical	Second Medical	Third Medical	Basic Life	Optional Life	Dental	Vision	GIC Medical	GIC Dental
01/01/2024	Original	(\$592.89)	(\$592.89)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

At the bottom, there are links for MTRS Website, Site Policy, and Contact Us, along with a copyright notice: © Vitech Systems Sub LLC 2021. All rights reserved.

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

This screenshot shows the same MyTRS interface as before, but with a red arrow pointing to the 'Insurance Transactions' link in the breadcrumb navigation: Insurance Deduction History / Insurance Transactions / Transaction Details. The 'Insurance Transactions' link is highlighted.

This will return you the *Insurance Deduction History* Screen.

The screenshot shows the MyTRS interface for 9007 - AVIARY PUBLIC SCHOOLS. The left sidebar is the same. The main content area displays the 'Insurance Deduction History / Insurance Transactions' page. It includes a table of transactions and a summary of the total balance.

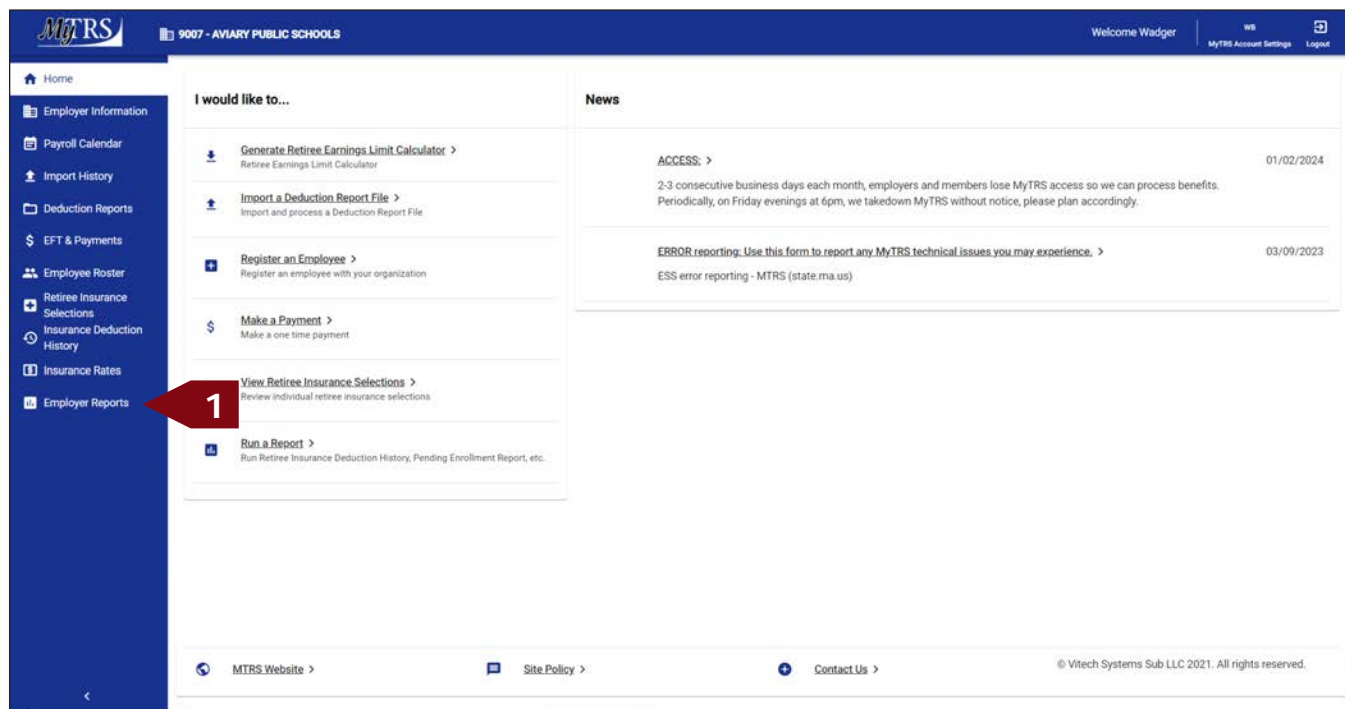
Trans #	Transaction Date	Activity Date	Trans Type	Identifier	Status	Balance
191212310 >	03/11/2024	01/01/2024	Premium Rebill	Rebill for 01/01/2024 - 03/31/2024	Open	\$592.89
191212313 >	03/11/2024	01/01/2024	Premium Rebill	Rebill for 01/01/2024 - 03/31/2024	Open	(\$592.89)
191212310 >	03/11/2024	12/01/2023	Premium Rebill	Rebill for 12/01/2023 - 03/31/2024	Open	(\$540.11)
191116902 >	02/15/2024	02/15/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
191116901 >	02/15/2024	02/15/2024	Disbursement Deduction	Disb Request	Closed	\$0.00
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
173957763 >	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
173999040 >	11/16/2023	12/01/2023	Premium Bill	EBILL for 12/01/2023 - 12/31/2023	Closed	\$0.00

At the bottom, there is a summary: 1 - 15 of 173. Page 1 of 12.

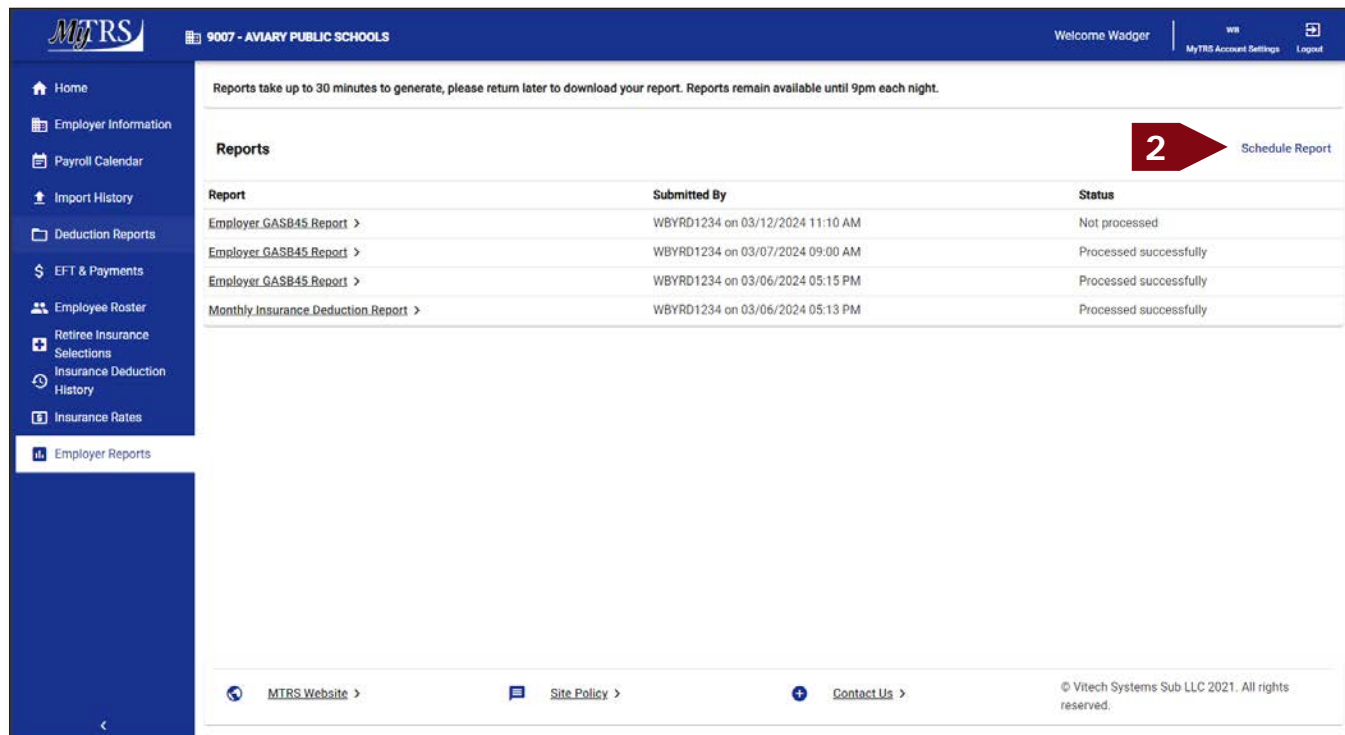
Chapter 11—Insurance Reports

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

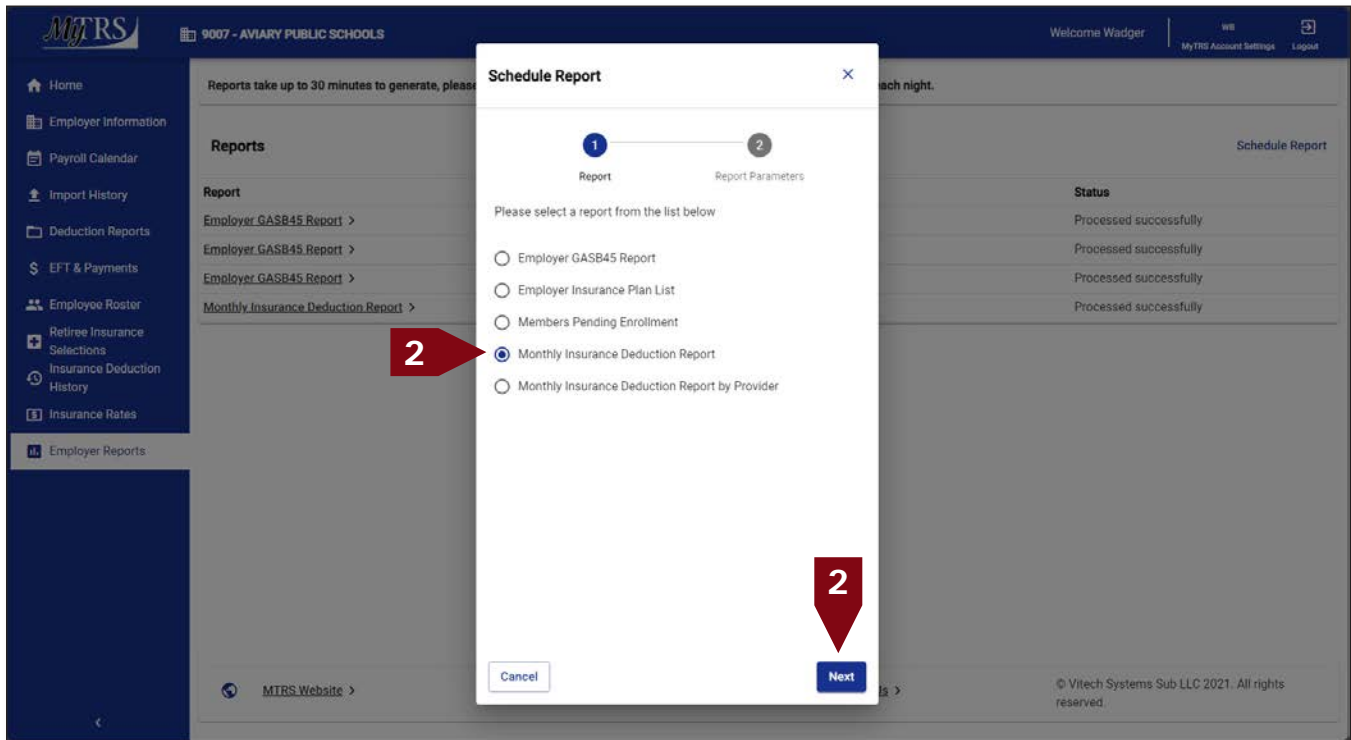
1. Click *Employer Reports* from the left navigation menu.



2. Click *Schedule Report*.



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**.

The screenshot displays the MTRS Employer Training Guide interface. A 'Schedule Report' dialog box is open, showing the 'Report' tab. The dialog box contains the following fields and options:

- Export Type:** Radio buttons for PDF and CSV. CSV is selected.
- Run Date:** 03/12/2024
- Employer Code:** 9007
- Month:** 12/2023

Red arrows labeled a, b, c, d, and e point to the 'Export Type', 'Run Date', 'Employer Code', 'Month', and 'Schedule' button respectively. The 'Schedule' button is highlighted in blue.

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.”

The screenshot shows the MyTRS web application interface. A green notification banner at the top states: "Monthly Insurance Deduction Report" has been scheduled and will begin momentarily. The main content area displays a table of reports. The first report, "Monthly Insurance Deduction Report", has a status of "Not processed". A red arrow points to this status. The second report, "Employer GASB45 Report", has a status of "Processed successfully".

Report	Submitted By	Status
Monthly Insurance Deduction Report >	WBYRD1234 on 03/12/2024 11:15 AM	Not processed
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.

The screenshot shows the MyTRS web application interface. A green notification banner at the top states: "Report 'Monthly Insurance Deduction Report' is ready to view." The main content area displays a table of reports. Both the "Monthly Insurance Deduction Report" and the "Employer GASB45 Report" now have a status of "Processed successfully".

Report	Submitted By	Status
Monthly Insurance Deduction Report >	WBYRD1234 on 03/12/2024 11:15 AM	Processed successfully
Employer GASB45 Report >	WBYRD1234 on 03/12/2024 11:10 AM	Processed successfully

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.

The screenshot shows a Windows File Explorer window titled "Downloads". It contains two files with names starting with "S3__aws.s3_mnt_v3_image_storage_mtrsdev_scheduled...". The first file has an "Open file" link next to it. A "Logout" button is visible on the right side of the window.

Sample view of a csv report:

	A	B	C	D	E	F	G	H	I	J	K	L
1	Monthly Insurance Deduction Report for 12/2023											
2	Employer: 9007 - AVIARY PUBLIC SCHOOLS											
3	Total Premium: \$5,258.96											
4	No. of Members: 19											
5	Name	SSN	MED	MED 2	MED 3	LIFE	OPT LIFE	DENTAL	VISION	Total Premium		
6	ALBATROS	XXX-XX-45	197.63	197.63	0	0	0	0	0	\$395.26		
7	BLACKBIRI	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	KINGFISHI	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	NYCTIBIU	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	WOODPEC	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												

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.

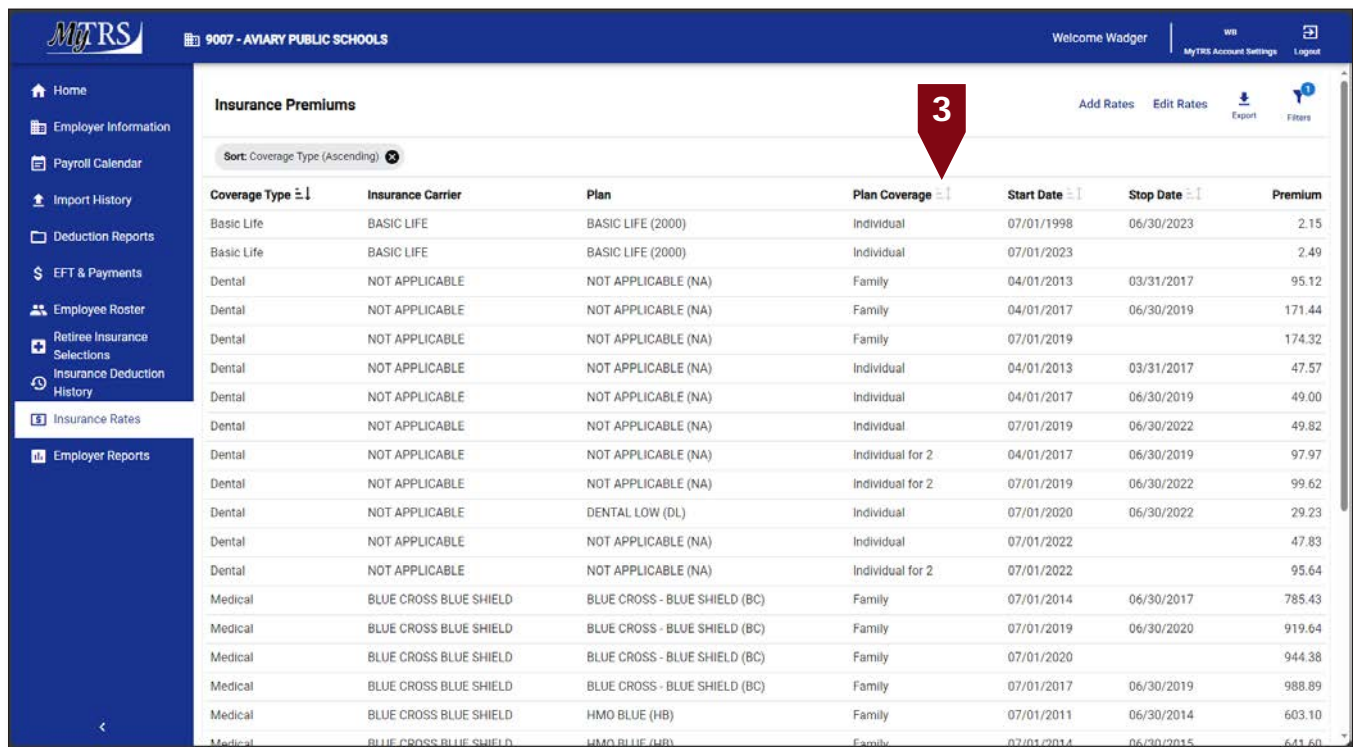
To review your rates:

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

2. The insurance plans and premiums will be displayed.

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
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	07/01/2019		174.32
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)	Individual	07/01/2023		406.36
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2023		330.74
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2023		886.33
Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/2023		2.49
Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2024		197.63
Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	01/01/2024		395.24
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

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.



Insurance Premiums

Sort: Coverage Type (Ascending)

Coverage Type	Insurance Carrier	Plan	Plan Coverage	Start Date	Stop Date	Premium
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
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	04/01/2013	03/31/2017	95.12
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	04/01/2017	06/30/2019	171.44
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	07/01/2019		174.32
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	04/01/2013	03/31/2017	47.57
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	04/01/2017	06/30/2019	49.00
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	07/01/2019	06/30/2022	49.82
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
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	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).

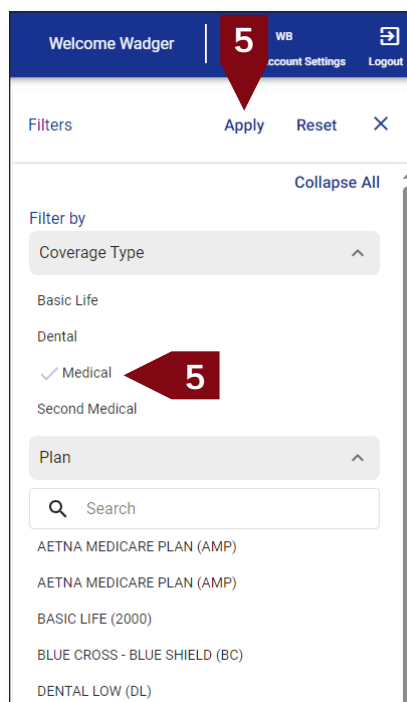


Insurance Premiums

Filters

Coverage Type	Insurance Carrier	Plan	Plan Coverage	Start Date	Stop Date	Premium
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- 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.

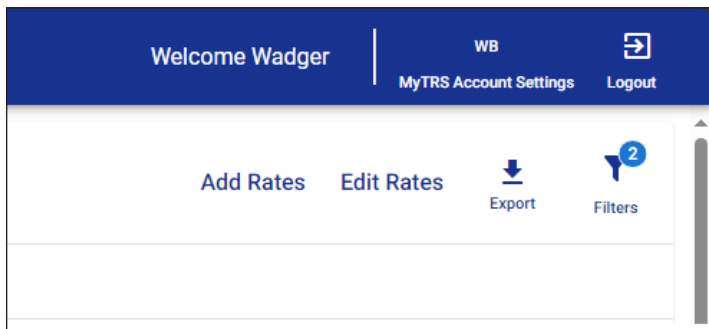


- MyTRS will now display your plans, as specified and show both filter bubbles indicating the filter and sorting options.

The screenshot shows the 'Insurance Premiums' table in the MyTRS interface. The table is filtered by 'Medical' and sorted by 'Coverage Type (Ascending)'. The table has columns for Coverage Type, Insurance Carrier, Plan, Plan Coverage, Start Date, Stop Date, and Premium. The table contains 20 rows of data.

Coverage Type	Insurance Carrier	Plan	Plan Coverage	Start Date	Stop Date	Premium
Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family	07/01/2014	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
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2014	06/30/2015	641.60
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2015	06/30/2016	711.54
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2019	06/30/2020	751.24
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.



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.

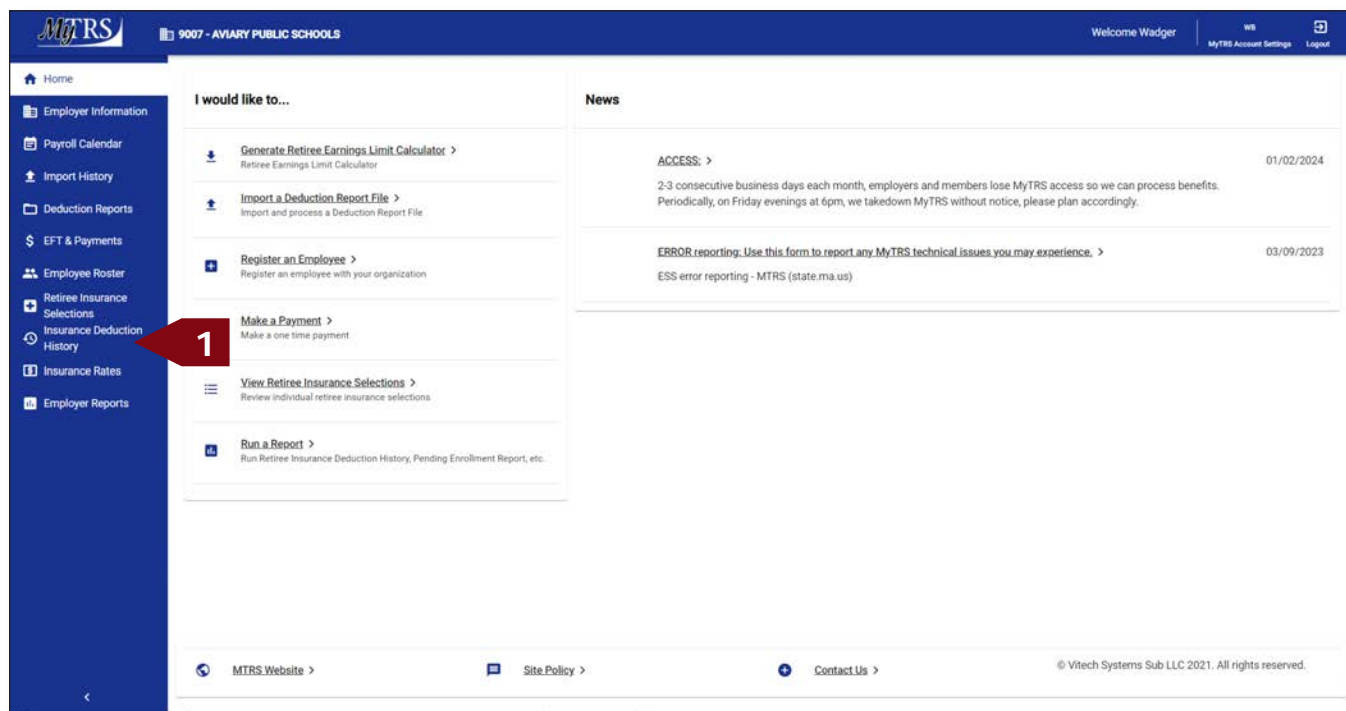
Creating new rate periods for a plan price change, requires users to add a new row at the new price level. Overwriting existing plans will result in the original deductions being refunded.

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

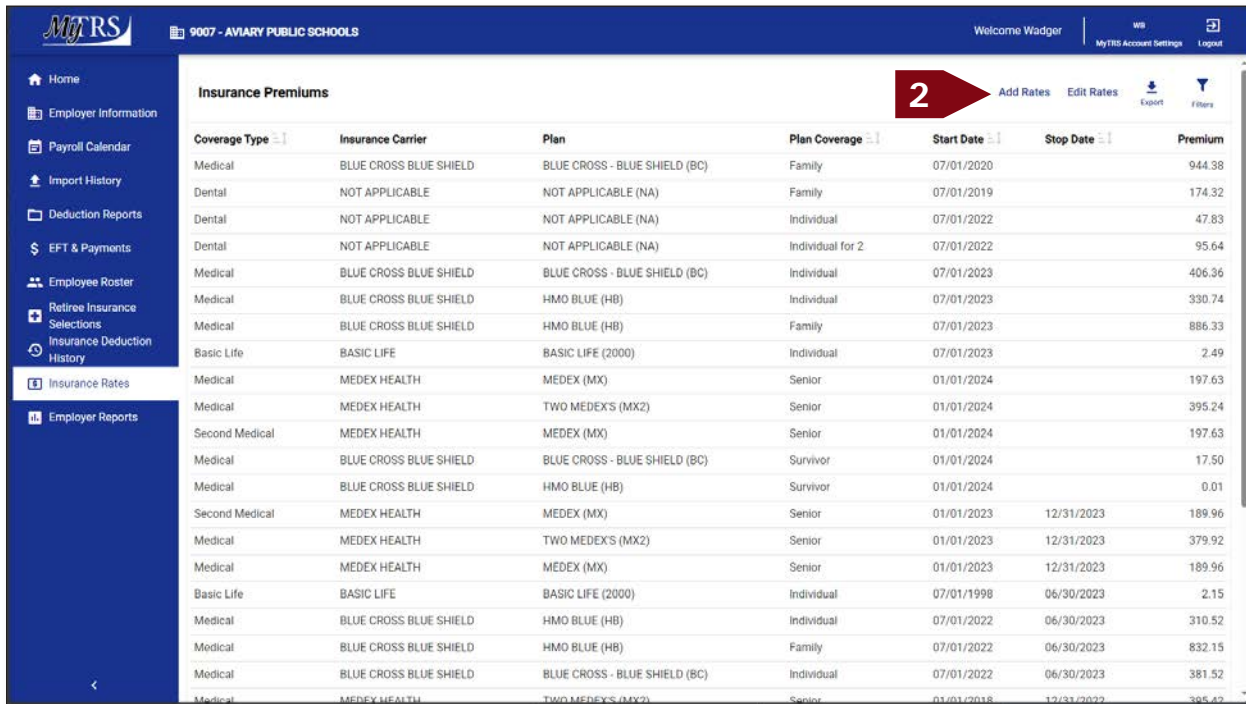
1. Select *Insurance Rates* from the left navigation menu.



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**.

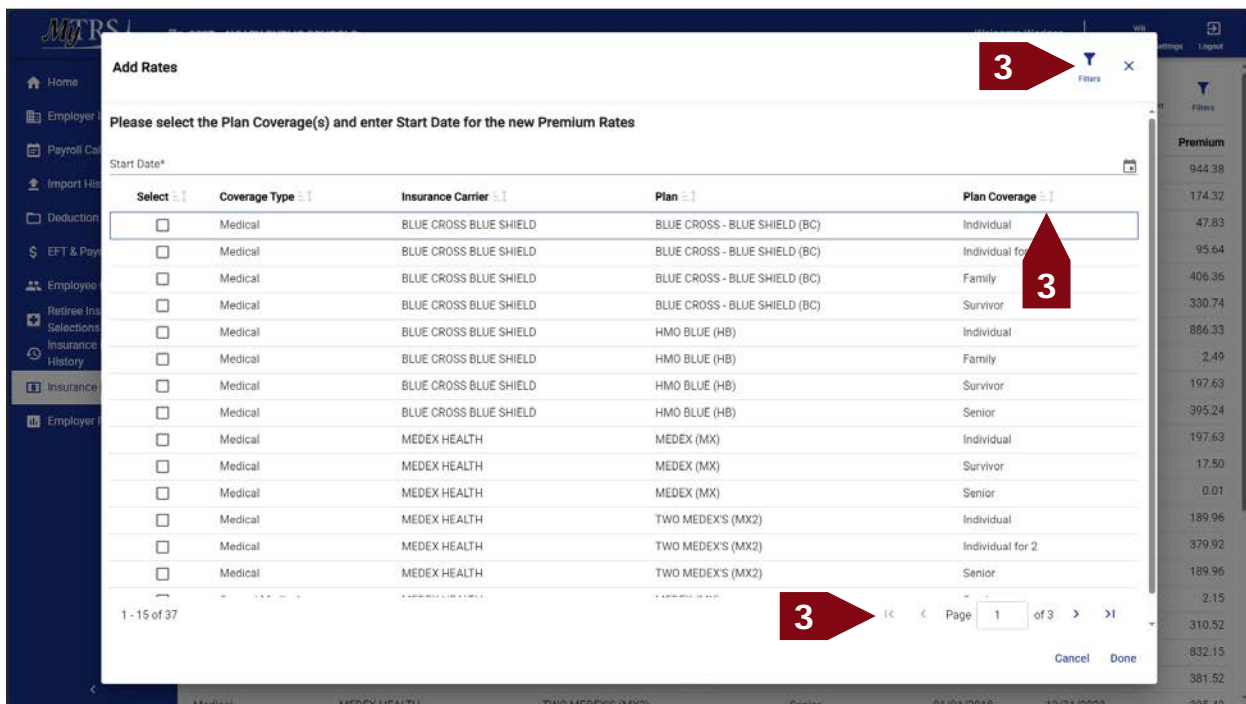


Insurance Premiums

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
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	07/01/2019		174.32
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)	Individual	07/01/2023		406.36
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2023		330.74
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2023		886.33
Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/2023		2.49
Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2024		197.63
Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	01/01/2024		395.24
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
Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	01/01/2018	12/31/2022	395.43

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

Please select the Plan Coverage(s) and enter Start Date for the new Premium Rates

Start Date*

Select	Coverage Type	Insurance Carrier	Plan	Plan Coverage
<input type="checkbox"/>	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual
<input type="checkbox"/>	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Individual for 2
<input type="checkbox"/>	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Family
<input type="checkbox"/>	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Survivor
<input type="checkbox"/>	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual
<input type="checkbox"/>	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family
<input type="checkbox"/>	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Survivor
<input type="checkbox"/>	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Senior
<input type="checkbox"/>	Medical	MEDEX HEALTH	MEDEX (MX)	Individual
<input type="checkbox"/>	Medical	MEDEX HEALTH	MEDEX (MX)	Survivor
<input type="checkbox"/>	Medical	MEDEX HEALTH	MEDEX (MX)	Senior
<input type="checkbox"/>	Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Individual
<input type="checkbox"/>	Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Individual for 2
<input type="checkbox"/>	Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior

1 - 15 of 37

Page 1 of 3

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.

The screenshot shows the 'Add Rates' page in the MyTRS system. The page title is 'Add Rates' and the instruction is 'Please select the Plan Coverage(s) and enter Start Date for the new Premium Rates'. Below this is a table with columns: 'Select', 'Coverage Type', 'Insurance Carrier', and 'Plan'. The table lists various medical plans from Blue Cross Blue Shield and MEDEX Health. A filter dropdown is open on the right, showing 'Filter by' with options for 'Select', 'Yes', 'No', 'Coverage Type', 'Plan', 'Plan Coverage', 'Insurance Carrier', and 'Individual for 2'. The 'Plan' filter is selected, and 'Aetna' is checked in the list. A red arrow with the number '4' points to the 'Aetna' filter option. The table shows 15 of 37 results, and the page is 1 of 3.

Select	Coverage Type	Insurance Carrier	Plan
<input type="checkbox"/>	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)
<input type="checkbox"/>	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)
<input type="checkbox"/>	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)
<input type="checkbox"/>	Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)
<input type="checkbox"/>	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)
<input type="checkbox"/>	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)
<input type="checkbox"/>	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)
<input type="checkbox"/>	Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)
<input type="checkbox"/>	Medical	MEDEX HEALTH	MEDEX (MX)
<input type="checkbox"/>	Medical	MEDEX HEALTH	MEDEX (MX)
<input type="checkbox"/>	Medical	MEDEX HEALTH	MEDEX (MX)
<input type="checkbox"/>	Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)
<input type="checkbox"/>	Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)
<input type="checkbox"/>	Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)

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

Add Rates

Search: Plan (Aetna)

Please select the Plan Coverage(s) and enter Start Date for the new Premium Rates

Start Date*
01/01/2024

Select	Coverage Type	Insurance Carrier	Plan	Plan Coverage
<input type="checkbox"/>	Medical	AETNA	AETNA MEDICARE PLAN (AMP)	Survivor
<input checked="" type="checkbox"/>	Medical	AETNA	AETNA MEDICARE PLAN (AMP)	Senior
<input checked="" type="checkbox"/>	Second Medical	AETNA	AETNA MEDICARE PLAN (AMP)	Senior

Cancel Done

Note:

Failing to enter a start date will trigger the following error and any date entered that is not the first of 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.

Start Date*

Start Date is required

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

Please click on Edit Rates button to enter Premium Amounts for the rows added with new Effective Start Date.

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.

MyTRS

9007 - AVIARY PUBLIC SCHOOLS

Welcome Wadger

WB

MyTRS Account Settings

Logout

Home

Employer Information

Payroll Calendar

Import History

Deduction Reports

EFT & Payments

Employee Roster

Retiree Insurance Selections

Insurance Deduction History

Insurance Rates

Employer Reports

Insurance Premiums

Add Rates

Edit Rates

Export

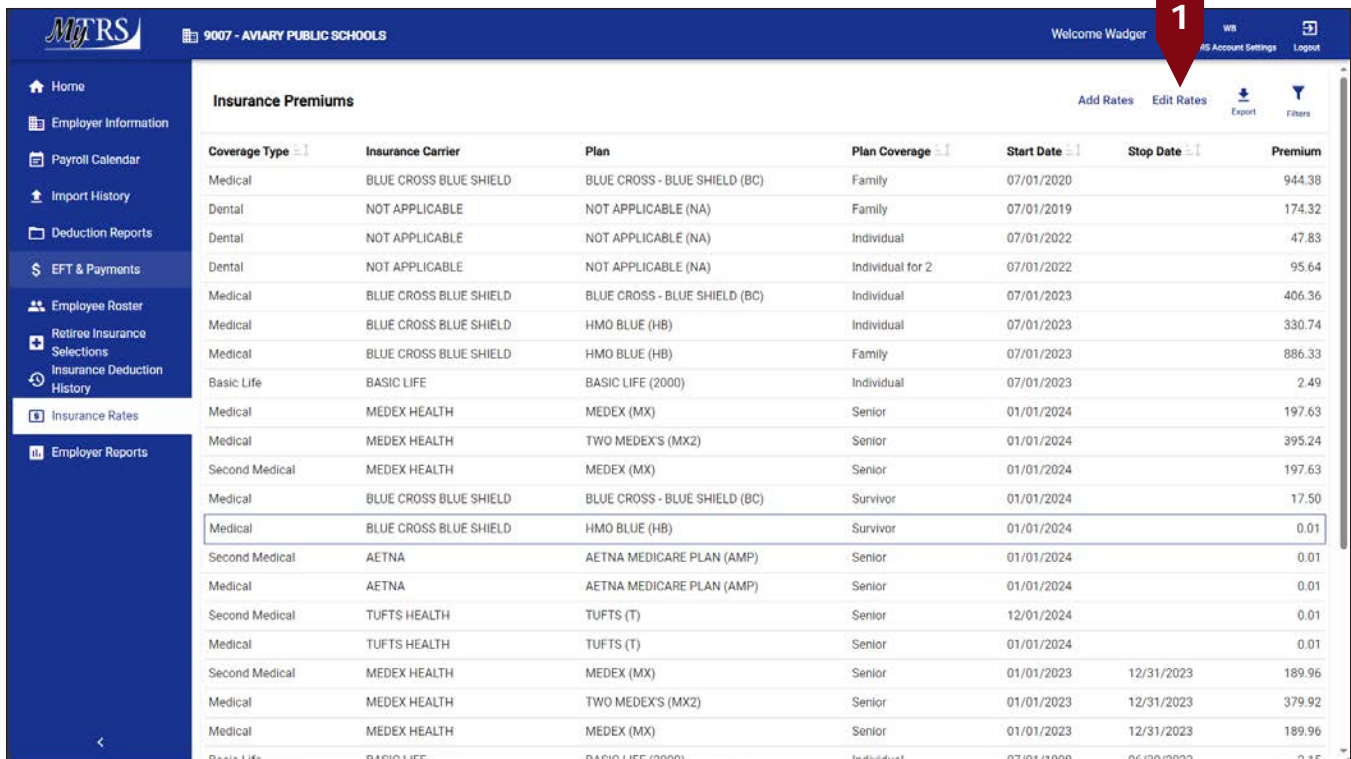
Filters

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
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	07/01/2019		174.32
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)	Individual	07/01/2023		406.36
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2023		330.74
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2023		886.33
Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/2023		2.49
Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2024		197.63
Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	01/01/2024		395.24
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
Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/2008	06/30/2023	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**.



MyTRS 9007 - AVIARY PUBLIC SCHOOLS Welcome Wadger **1** WB Account Settings Logout

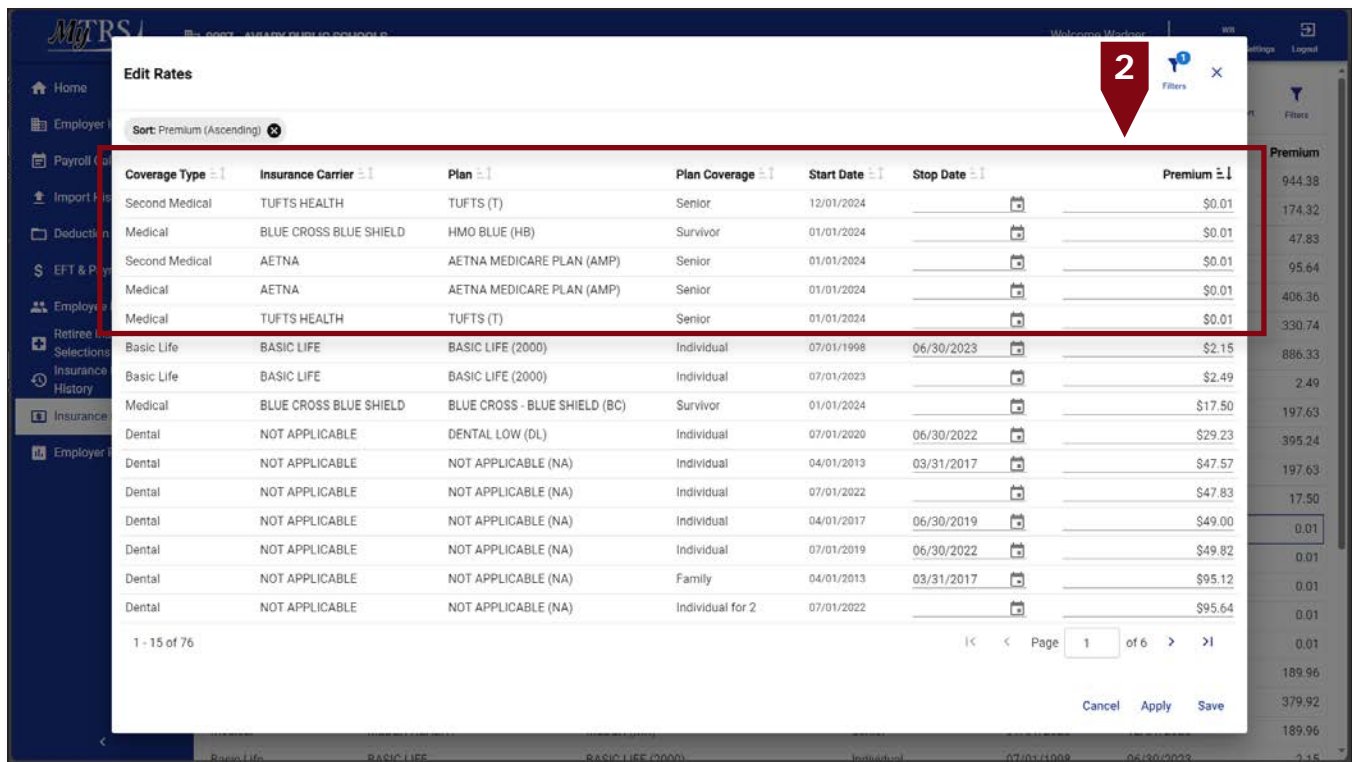
Home Employer Information Payroll Calendar Import History Deduction Reports EFT & Payments Employee Roster Retiree Insurance Selections Insurance Deduction History **Insurance Rates** Employer Reports

Insurance Premiums Add Rates Edit Rates Export Filters

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
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	07/01/2019		174.32
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)	Individual	07/01/2023		406.36
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2023		330.74
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2023		886.33
Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/2023		2.49
Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2024		197.63
Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	01/01/2024		395.24
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
Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/2008	06/30/2023	2.15

- 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.



Edit Rates

Sort: Premium (Ascending) X

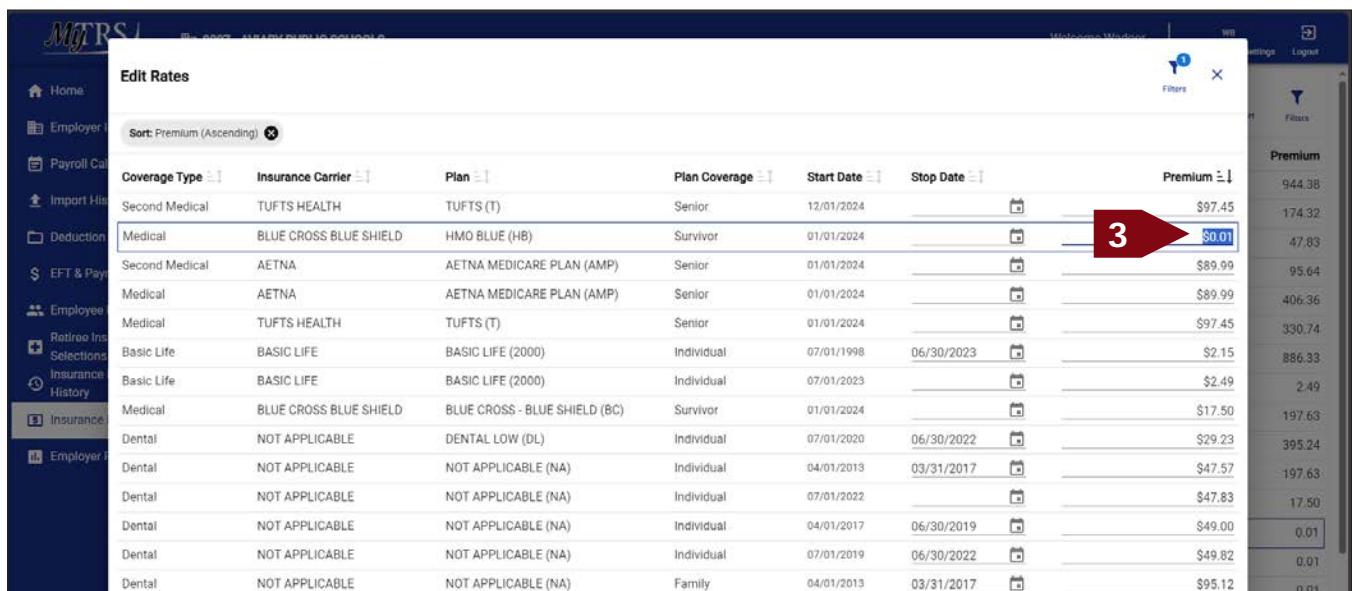
Coverage Type	Insurance Carrier	Plan	Plan Coverage	Start Date	Stop Date	Premium
Second Medical	TUFTS HEALTH	TUFTS (T)	Senior	12/01/2024		\$0.01
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Survivor	01/01/2024		\$0.01
Second Medical	AETNA	AETNA MEDICARE PLAN (AMP)	Senior	01/01/2024		\$0.01
Medical	AETNA	AETNA MEDICARE PLAN (AMP)	Senior	01/01/2024		\$0.01
Medical	TUFTS HEALTH	TUFTS (T)	Senior	01/01/2024		\$0.01
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
Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Survivor	01/01/2024		\$17.50
Dental	NOT APPLICABLE	DENTAL LOW (DL)	Individual	07/01/2020	06/30/2022	\$29.23
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	04/01/2013	03/31/2017	\$47.57
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	07/01/2022		\$47.83
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	04/01/2017	06/30/2019	\$49.00
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	07/01/2019	06/30/2022	\$49.82
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	04/01/2013	03/31/2017	\$95.12
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual for 2	07/01/2022		\$95.64

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Cancel Apply Save

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

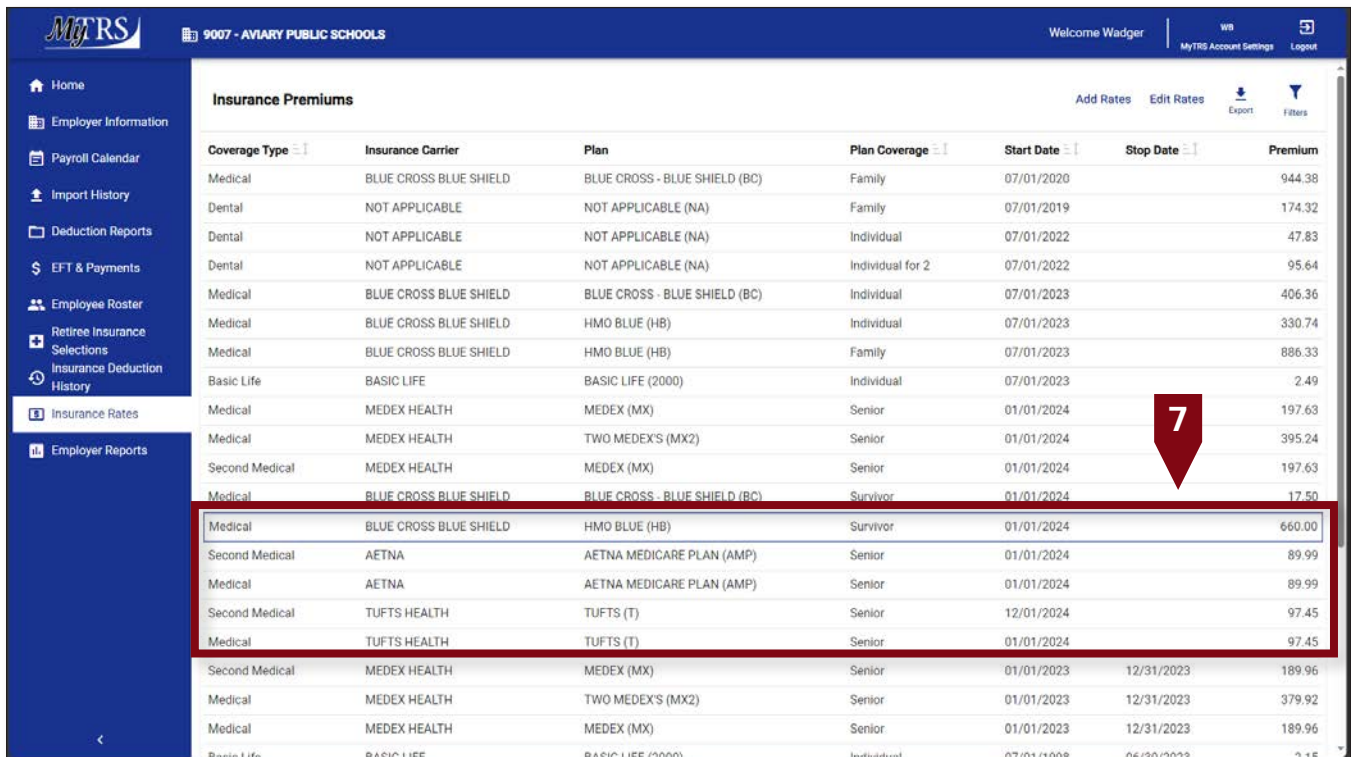


Edit Rates

Sort: Premium (Ascending) X

Coverage Type	Insurance Carrier	Plan	Plan Coverage	Start Date	Stop Date	Premium
Second Medical	TUFTS HEALTH	TUFTS (T)	Senior	12/01/2024		\$97.45
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		\$89.99
Medical	AETNA	AETNA MEDICARE PLAN (AMP)	Senior	01/01/2024		\$89.99
Medical	TUFTS HEALTH	TUFTS (T)	Senior	01/01/2024		\$97.45
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
Medical	BLUE CROSS BLUE SHIELD	BLUE CROSS - BLUE SHIELD (BC)	Survivor	01/01/2024		\$17.50
Dental	NOT APPLICABLE	DENTAL LOW (DL)	Individual	07/01/2020	06/30/2022	\$29.23
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	04/01/2013	03/31/2017	\$47.57
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	07/01/2022		\$47.83
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	04/01/2017	06/30/2019	\$49.00
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Individual	07/01/2019	06/30/2022	\$49.82
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	04/01/2013	03/31/2017	\$95.12

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.



The screenshot shows the 'Insurance Premiums' table in the MyTRS system. The table has columns for Coverage Type, Insurance Carrier, Plan, Plan Coverage, Start Date, Stop Date, and Premium. A red box highlights a group of rows, and a red arrow with the number 7 points to the 'Stop Date' column of the first row in that group.

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
Dental	NOT APPLICABLE	NOT APPLICABLE (NA)	Family	07/01/2019		174.32
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)	Individual	07/01/2023		406.36
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Individual	07/01/2023		330.74
Medical	BLUE CROSS BLUE SHIELD	HMO BLUE (HB)	Family	07/01/2023		886.33
Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/2023		2.49
Medical	MEDEX HEALTH	MEDEX (MX)	Senior	01/01/2024		197.63
Medical	MEDEX HEALTH	TWO MEDEX'S (MX2)	Senior	01/01/2024		395.24
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
Basic Life	BASIC LIFE	BASIC LIFE (2000)	Individual	07/01/2008	06/30/2023	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.

SSN	Member Number	Member Name	Coverage Type	Insurance Plan	Plan Coverage	Start Date	Stop Date	Premium Amount
XXX-XX-6637 >	94669	Vulture, Vicky	Medical	MEDEX (MX)	Senior	01/01/2024		\$197.63
XXX-XX-6637 >	94669	Vulture, Vicky	Basic Life	BASIC LIFE (2000)	Individual	07/01/2023		\$2.49
XXX-XX-6637 >	94669	Vulture, Vicky	Medical	MEDEX (MX)	Senior	01/01/2023	11/30/2023	\$189.96
XXX-XX-6637 >	94669	Vulture, Vicky	Dental	NOT APPLICABLE (NA)	Individual	07/01/2022		\$47.83
XXX-XX-6637 >	94669	Vulture, Vicky	Medical	MEDEX (MX)	Senior	01/01/2022	12/31/2022	\$199.96
XXX-XX-6637 >	94669	Vulture, Vicky	Dental	NOT APPLICABLE (NA)	Individual	07/01/2019	06/30/2022	\$47.83
XXX-XX-6637 >	94669	Vulture, Vicky	Medical	MEDEX (MX)	Senior	01/01/2018	12/31/2021	\$197.71
XXX-XX-6637 >	94669	Vulture, Vicky	Dental	NOT APPLICABLE (NA)	Individual	04/01/2017	06/30/2019	\$49.00
XXX-XX-6637 >	94669	Vulture, Vicky	Medical	MEDEX (MX)	Senior	01/01/2017	12/31/2017	\$194.94
XXX-XX-6637 >	94669	Vulture, Vicky	Medical	MEDEX (MX)	Senior	01/01/2016	12/31/2016	\$175.20
XXX-XX-6637 >	94669	Vulture, Vicky	Medical	MEDEX (MX)	Senior	01/01/2015	12/31/2015	\$166.57
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	\$274.80
XXX-XX-6637 >	94669	Vulture, Vicky	Dental	NOT APPLICABLE (NA)	Individual	04/01/2013	03/31/2017	\$47.57
XXX-XX-6637 >	94669	Vulture, Vicky	Basic Life	BASIC LIFE (2000)	Individual	08/01/2000	06/30/2023	\$2.15

If you have any questions, please contact us at insuranceupdates@trb.state.ma.us.