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8. TERMINATING INSURANCE FOR A RETIREE OR DEPENDENT

Explains how to terminate insurance for a retiree or a dependent. If you are terminating insurance due to a death or divorce, see instructions below.

9. DEATH OR DIVORCE OF A SPOUSE

Explains how to update the insurance information on the member's record due to a death or divorce of a spouse.

10. CONTINUANCE BENEFIT – RETRO ADD (MEDICAL SUBSIDY)

When a member passes away and leaves a monthly benefit for the surviving spouse, insurance deductions do not automatically carry over. These instructions explain how to add insurance deductions to a surviving spouse's new record. **Note**: For NHRS Medical Subsidy only .

11. CHANGING FROM MEDICAL SUBSIDY ONLY TO HAVING DEDUCTIONS

Explains how to switch from a retiree just having the NHRS Medical Subsidy to having deductions.

12. CHANGING FROM ONE MEDICOMP PREMIUM OR GROUP NUMBER TO ANOTHER (TPAs)

Explains the process of changing from one Medicare premium or group number to another one. **Note**: These instructions are for third party administrators (TPAs).

Getting Started

I. Logging into the DRS Insurance Module

1. To get started, click on the **DRS Quicklink** at the top of the www.nhrs.org homepage.
2. Click on **Authorized** on the Authorized Access Only screen and use your **Username** and **Password** to **Login**.

> **Note:** If you do not have a username and password, or do not have access to the Insurance Module, please call NHRS at (603) 410-3508.
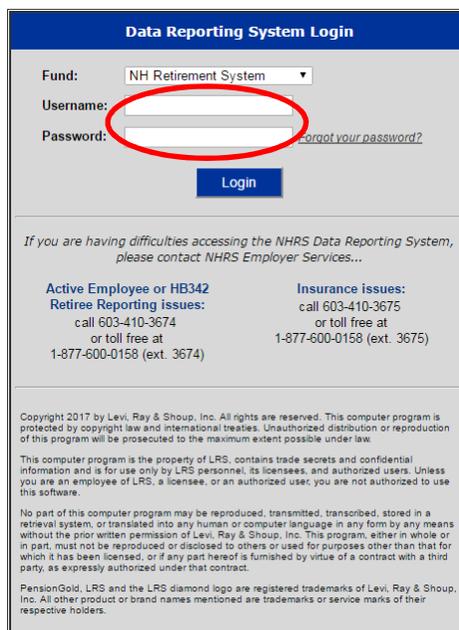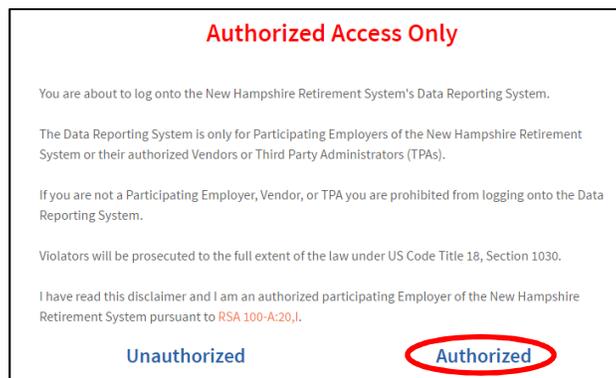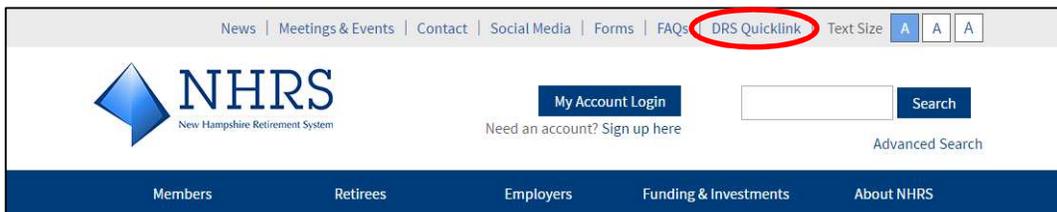
3. Click on the **Insurance Reporting** link.
   a. From this module you will be able to submit or change insurance authorizations (i.e. annuity deduction authorizations) or update group insurance premium rates.

> **Note:** New or infrequent users should review the key terms listed below before entering the module.

KEY TERMS

- **Carrier:** This is the vendor number. Most employers have one carrier; larger employers and third-party administrators (TPAs) can have multiple carriers.
- **Coverage Code:** Typically, this is the plan's coverage group (ex. Group A, Group B, etc.) followed by plan type (ex. 1-Per, 2-Per, FAM, MEDI).
  - **Note:** Rates ending in –M indicate a rate for a member and/or spouse receiving a Married Couple Double Subsidy.
- **Collection ID:** Typically the plan's group number, either listed alone or with the A, B, C from the coverage code included.
- **Premium Type:** This is the type of coverage – 1-Person, 2-Person, Family, Medicomp.

- **Rate:** This is the premium rate for each coverage code.

II. Navigating the DRS Insurance Module Menu

The menu on the left-hand side of the Insurance Module consists of four components.

- The **Rates** section is where employers and TPAs can change, terminate, reactivate, or add new premium rates for each coverage type offered. Typically, rate changes are made annually. For an instructional video on this process, see https://www.nhrs.org/education

- The **Authorizations** section is where employers and TPAs can add, modify, or terminate coverage at the individual level.

- The **Reports** section allows employers and TPAs to run an Insurance Deduction Register (this is the same report you receive in your End of Month File) or an Insurance Active Rate report. See below for instructions on running reports.

  Note: Having these reports open will be useful when doing insurance authorizations.
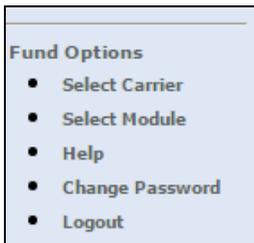
- The **Fund Options** section allows employers and TPAs with multiple carriers to select a specific carrier. All users may also switch to a different DRS module (if authorized), access the help section, change a password, and log out of the DRS.

III. Generating Reports in the DRS Insurance Module

INSURANCE DEDUCTION REGISTER REPORT

The Insurance Deduction Register report is useful when submitting insurance authorizations (to know which retirees are attached to specific Collection IDs), or when terminating a rate (to show retirees associated with the rate).

1. Click on **Ins Deduction Register**.
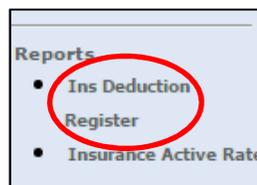
2. The screen below will appear:
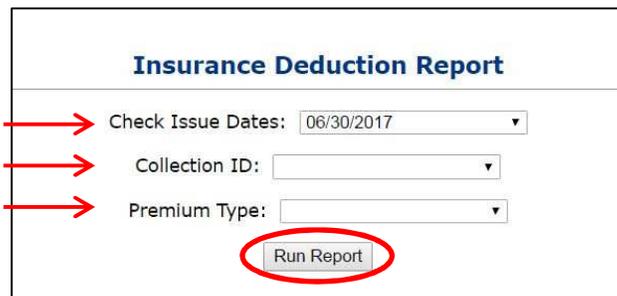
3. Use the **Check Issue Dates** field to choose which month you wish to run a report for.
4. You can refine the report by choosing a specific **Collection ID**.
5. You can then further sort the report by **Premium Type**.
   a. If you do not select a Premium Type, <u>all</u> retirees attached to the selected Collection ID will show. If you do not select a Collection ID, <u>all</u> retirees in the selected Check Issue Dates will show.
   b. **Note:** When inputting insurance authorizations, you should sort by Collection ID. You can also further sort the report by Premium Type, if needed.
6. After choosing the parameters of the report, click **Run Report**. The screen below will appear:

7. Click **Download File**. The report will open in a new browser window.
8. Here is an example of an Insurance Deduction Register report:

Run Date : 03/30/2017
Run Time : 8:07 AM

NH Retirement System
Insurance Deduction Register

User Id : PGold Logon
Page: 1

Insurance Type:	All Insurance Types		Check Issue Date:	04/28/2017			
Insurance Carrier:			Payroll Mode:	Trial Run			
Collection ID:	1000340-AA	Premium Type:	One Person Premium Coverage				

Payee Name	SSN	Plan	Member Deduction Amount	Employer Amount	NHRS Amount	Total Premium
		Employee - P. Subdivision	$55.94	$0.00	$375.56	$431.50
		Employee - P. Subdivision	$55.94	$0.00	$375.56	$431.50
Totals for Carrier By Plan						
Employee - P. Subdivision	2		$111.88	$0.00	$751.12	$863.00
Carrier Totals:	2		$111.88	$0.00	$751.12	$863.00
Totals for Insurance Type By Plan						
Employee - P. Subdivision	2		$111.88	$0.00	$751.12	$863.00
Insurance Type Totals:	2		$111.88	$0.00	$751.12	$863.00

INSURANCE ACTIVE RATE REPORT

The Insurance Active Rate report is useful when you are selecting insurance premiums. You will use this report to reference the active rates for the payroll months you are working on.

1. Click on **Insurance Active Rate**.

2. The screen below will appear:

3. You can run this report to sort by either **Coverage Code** or **Effective Date**.
4. Here is an example of an Insurance Active Rate Report:

NH Retirement System
Insurance Active Rate Report

Company Name:
Carrier Code: 1000340

Coverage Code	Description	Collection ID	Total Premium	Employer Amount	Effective Date	Termination Date
GROUP A - 1 PER	1000340 RED 35%	1000340-A	$277.90	$0.00	07/01/2016	
GROUP A - 2 PER	1000340 RED 35%	1000340-A	$555.80	$0.00	07/01/2016	
GROUP A - MEDI	1000340 MEDI WITH RX	1000340-A	$438.54	$0.00	01/01/2017	
GROUP A - MEDI-M	1000340 MEDI WITH RX	1000340-A	$438.54	$0.00	01/01/2017	
GROUP AA- 1 PER	1000340 GREEN 50%	1000340-AA	$431.50	$0.00	07/01/2016	
GROUP B - 1 PER	1000340 SINGLE DENTAL	1000340-B	$45.03	$0.00	07/01/2015	
GROUP B - 2 PER	1000340 2PERSON DENTAL	1000340-B	$86.65	$0.00	07/01/2015	
GROUP B - FAM	1000340 FAMILY DENTAL	1000340-B	$138.74	$0.00	07/01/2015	
GROUP BB- 1 PER	1000340 YELLOW 35%	1000340-BB	$258.30	$0.00	07/01/2016	
GROUP BB- 2 PER	1000340 YELLOW 35%	1000340-BB	$516.60	$0.00	07/01/2016	
GROUP D - 1 PER	1000340 BLUE 100%	1000340-D	$949.50	$0.00	07/01/2016	
GROUP D - 1 PER-M	1000340 BLUE 100%	1000340-D	$949.50	$0.00	07/01/2016	
GROUP E - 1 PER	1000340 YELLOW 50%	1000340-E	$369.00	$0.00	07/01/2016	
GROUP E- 1 PER	1000340 RED 100%	1000340-E	$794.00	$0.00	07/01/2016	
GROUP E- 2 PER	1000340 RED 100%	1000340-E	$1,210.00	$0.00	10/01/2014	
GROUP F - 1 PER	1000340 YELLOW 70%	1000340-F	$516.60	$0.00	07/01/2016	
GROUP G - 1 PER	1000340 POS 35% BUY UP 1 PERSON	1000340-G	$363.62	$0.00	07/01/2015	
GROUP G - 2 PER	1000340 POS 35% BUY UP 2 PERSON	1000340-G	$727.25	$0.00	07/01/2015	
GROUP H - 1 PER	1000340 BLUE 100%	1000340-H	$888.50	$0.00	07/01/2015	

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IV. Looking up an Individual Record

To add or change insurance premiums, you will need to access the record for the primary insured individual (i.e. the retiree or the retiree's spouse, if the retiree is deceased). The record is accessed by Social Security number.

The record will contain information for everyone who is receiving coverage (i.e. their spouse or other dependents, if any).

1. Click on **Search for SSN** in the Authorizations section.
    Note: If you have multiple carriers, be sure you have selected the appropriate carrier for the member you are searching for.
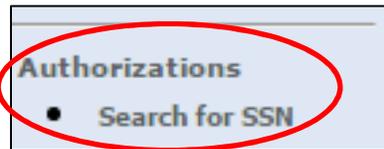
2. Enter the retiree's Social Security number to view Medicare information (if any), dependents attached to the plan, and health, dental and/or vision insurance deductions.
    Note: If the Social Security number is not found, please double-check the number and try again. If needed, please contact an NHRS Medical Benefits representative at (603) 410-3675 for further assistance.

Search For SSN
Enter SSN for the Payee

SSN: [   ]

Search

3. Here is an example of an individual retiree's record page:

NHRS Data Reporting System

PensionGold
RETIREMENT SOLUTIONS
Software for Pension Administration

Rates
- Change
- Terminate
- Reactivate
- Add Brand New

Authorizations
- Search for SSN
- Queued Items
- All Queued Items

Reports
- Ins Deduction Register
- Insurance Active Rate

Fund Options
- Select Carrier
- Select Module
- Help
- Change Password
- Logout

Payee Benefit Information
Add, Edit or Terminate benefit information below or call a Medical Benefit Representative at (603) 410-3675 for assistance

SSN: ████████

| Name: ████ | DOB: ████ | Gender: Male |
| Medicare#: | Part A Eligible Date: | Part B Eligible Date: |

Update Medicare Information

Dependents

	Name	SSN	DOB	Relationship	Medicare	Effective Date	
Edit	████	████	████	Wife	N	06/04/2008	Terminate

Add Dependent

Insurance

	Benefit Type	Ben Eff Date	Associated To	Ins Type	Cov Code	Mbr Prem	Subsidy Only	Effective Date	
Add Ins	Early Retirement	06/01/2008							
			████	Dental	GROUP B - 2 PER	$ 86.65	N	06/01/2008	Terminate
			████	Health	GROUP AA- 1 PER	$ 431.50	N	08/01/2015	Terminate
			████	Health	GROUP AA- 1 PER	$ 431.50	N	08/01/2015	Terminate

4. From this page, you will be able to complete a number of tasks, including:

   a. Setting up insurance for the first time; changing a benefit from a two-person plan into two separate plans; adding Medicare information and changing coverage to Medicomp; adding or removing dependents; etc.

   b. Step-by-step instructions for the following processes are available:

      i. **Adding Insurance for a Retiree**
      ii. **Adding Dependents**

iii. **Adding Insurance for a Dependent**
iv. **Adding a Medicare Card for a Retiree or Dependent**
v. **Terminating Insurance for a Retiree or Dependent**
vi. **Two-Person to Two Separate Plans** (Use this to change a benefit from a two-person plan into two separate plans.)
vii. **Death or Divorce of a Spouse**
viii. *__Changing to a Medicare Plan (For a Dependent)__*
ix. **Continuance Benefit- Retro Add** (Use this to set up a continuance benefit and add insurance deductions to a spouse's monthly survivor benefit when a retiree passes away. **Note:** For NHRS Medical Subsidy purposes only. NHRS cannot retroactively pay payee deductions.)
x. **Changing from One Medicare Premium or Group Number to Another** (For TPAs only.)
xi. **Changing from Medical Subsidy Only to Having Deductions** (Use this when an NHRS Medical Subsidy recipient with zero deductions will begin to have deductions.)

V. Supporting Documentation

As you make deduction changes, some actions require supporting documents to be uploaded:

    Note: The file must be saved as one of the following file types: .BMP, .JPEG, .JPG, .PDF, .PNG, .TIF, .TIFF, or .TXT.

- To add Medicare information for a retiree or dependent, you will need:
  - Medicare card or letter from Social Security showing Part A and Part B, if applicable, dates.
- For first time setup of insurance or adding insurance after a gap in coverage, you will need:
  - Annuity Deduction Authorization Form and/or a letter from their previous employer showing coverage for time of break.
- To add a new dependent, you will need:
  - Marriage certificate for spouse, and doctor's note and tax information for a disabled dependent.
- To terminate insurance for reason of death or divorce, you will need:
  - Death certificate or divorce decree.

Note: To add a Medicomp supplemental insurance plan, an upload may not be required but it is always queued for approval by an NHRS Medical Benefits representative.

Adding Insurance for a Retiree

Some screenshots in these instructions may appear slightly different on your computer. This is due to browser differences (i.e. Internet Explorer vs Chrome, etc.). It should not affect how you set up insurance. However, if you see a different screen and are unsure how to proceed, please contact an NHRS Medical Benefits representative at (603) 410-3675 for further assistance.

1. Search for the retiree by typing in their SSN:

2. Once the retiree is identified, you will see a screen with the retiree's benefit information. Health insurance is added under the **Insurance** section. Click on **Add Ins.** If there is more than one Benefit Type shown, make sure to choose the retirement benefit (service, deferred vested, early, disability). For a continuance, select continuance.

3. When you click on **Add Ins** this screen will appear:

4. Select the retiree's name from the names listed in the drop-down menu field next to **Insurance Premium For:**

5. Type in the **Effective Date**. The effective date will be the month in which you are working in. For example, if you are keying insurance for April use "04/01/2017."
    > **Note:** The "/01/" will automatically prefill; just type in the Month (04) and year (2017).

6. Then select a plan from the **Insurance Type** drop-down menu. In some cases, there may be more than one option (i.e. "health," "dental," "vision," etc.) In this case select health. Click **Continue**.
    > **Note**: If you click on **Back to Payee** you will lose what you have done so far.

7. Choose the **Coverage Description** from the drop-down list of all coverage types associated with the employer. Click **Continue.**
    > **Note**: If you are not sure what to select you can refer back to the Insurance Active Rate report listed in your Reports section. (See, "Getting Started").

8. After you click **Continue**, the following screen will appear. Review all the information listed on this screen. If everything is correct, click on **Save Insurance Info**. If the information is incorrect, click on Back to Payee and re-enter the correct information

9. When you click on **Save Insurance Info**, you will have the ability to upload any necessary files. You may also print the screen from your records.

     Note: For a first time set-up, or to reinstate insurance, you will need to click on **Upload Files** and upload a copy of the NHRS *Annuity Deduction Authorization Form* (See: https://www.nhrs.org/employers/forms)

10. When you click on **Upload Files** you will see the following screen. Click **Choose File** and find the appropriate file on your computer.
     Note: The file must be saved as one of the following file types: .BMP, .JPEG, .JPG, .PDF, .PNG, .TIF, .TIFF, or .TXT:

11. Once you have selected the file, click on **Upload File.** If the file upload was successful, you will see this screen:

> **Note**: This file upload will be reviewed by a Medical Benefits representative at NHRS. (Any time you add a Medicomp/supplemental insurance it will queue).

File Upload Successful

File P110758_I406_Annuity Deduction Auth.pdf was uploaded and associated to this queued action.

If you need to upload another file to support this change, click on "More Files".

Please print screen for your records. A Medical Benefit representative will review the queued changes and uploaded documents for approval. Return to the Payee Benefit Information screen by selecting Back to Payee.

Back to Payee   More Files...   Print Screen

12. If you are finished uploading files, click **Back to Payee.**

ADDITIONAL INFORMATION

If you need to add dental or vision coverage, you will follow the same steps as above. If the NHRS *Annuity Deduction Authorization Form* uploaded for health insurance also contains dental/vision coverage information, you may re-upload that same form when prompted.

> **Note:** Sometimes this may be done through another carrier. If you have multiple accounts with NHRS – for example your dental is a separate account – you can select your additional carrier account under fund options on the left-hand side. If you are not the carrier who administers the additional coverage, this will need to be done by that entity.

NHRS medical subsidy eligibility is determined by NHRS Medical Benefits representatives. If a retiree is eligible for the medical subsidy, NHRS will contact you.

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Adding Dependents

Some screenshots in these instructions may appear slightly different on your computer. This is due to browser differences (i.e. Internet Explorer vs Chrome, etc.). It should not affect how you set up insurance. However, if you see a different screen and are unsure how to proceed, please contact an NHRS Medical Benefits representative at (603) 410-3675 for further assistance.

1. Begin on the retiree's Payee Benefit Information screen. Click on **Add Dependent** under the Dependents section.

   Note: In most instances you will only need to add a spouse, but approved Disabled Dependent Children may be included as well. Only add additional dependents if NHRS Medical Subsidy is needed.

2. When you click on **Add Dependent**, you will be taken to this screen. Fill in all of the required fields, which are denoted with an asterisk. Please use all CAPITAL letters. (If there is Medicare information for the dependent fill in the required fields, or see *Adding a Medicare Card for a Retiree or Dependent*.) Once you have finished, click on **Save Dependent Info.**

> **Note:** The **Effective Date** will be the month in which you expect the change to occur. For example, if you are keying insurance for April use "04/01/2017." The "/01/" will automatically prefill; just type in the Month (04) and year (2017).

3. Once you have clicked on **Save Dependent Info.** The page will refresh and you will see a screen that looks like this. You will have the option of **Upload Files** or **Print Screen** for your records.

    a. Some files you may need to upload include:

        i. A marriage certificate if dependent is newly married to the retiree and you believe NHRS may not have it on file, or;

        ii. A copy of the Medicare card, if applicable.

        iii. Tax documents and a physician's statement are needed to add a Disabled Dependent Child.

> **Note:** You can upload multiple files at once. If you click on **Upload Files** you would at that time upload any files that need to be uploaded.

4. When you click on **Upload files**, you will be taken to this screen. Select the appropriate file, then click **Upload File**.

> **Note:** The file must be saved as one of the following file types: .BMP, .JPEG, .JPG, .PDF, .PNG, .TIF, .TIFF, or .TXT.

Dependent File Upload
Select the file(s) supporting the desired change (Medicare Card or Letter from Soc Sec). If more than one file is needed, you will be prompted after uploading this file.

→ Choose File [ ] pdf

→ Upload File

→ Back to Payee

5. If the file upload was successful, you will see the following screen. This item has now been queued and is awaiting approval from a Medical Benefits representative at NHRS. Once you are done click on **Back to Payee**. You will be brought back to the Payee Benefit Information page.

File Upload Successful

File [ ] pdf was uploaded and associated to this queued action.

If you need to upload another file to support this change, click on "More Files".

Please print screen for your records. A Medical Benefit representative will review the queued changes and uploaded documents for approval. Return to the Payee Benefit Information screen by selecting Back to Payee.

Back to Payee | More Files... | Print Screen

Back to index

Adding Insurance for a Dependent

Some screenshots in these instructions may appear slightly different on your computer. This is due to browser differences (i.e. Internet Explorer vs Chrome, etc.). It should not affect how you set up insurance. However, if you see a different screen and are unsure how to proceed, please contact an NHRS Medical Benefits representative at (603) 410-3675 for further assistance.

1. Begin at the retiree's Payee Benefit Information page.

Payee Benefit Information
Add, Edit or Terminate benefit information below or call a Medical Benefit Representative at (603) 410-3675 for assistance

SSN: ████████

| Name: | ████████ | DOB: | ████████ | Gender: | Male |

| Medicare#: | ████████ | Part A Eligible Date: | 04/01/2017 | Part B Eligible Date: | 04/01/2017 |

[Update Medicare Information]

Dependents

	Name	SSN	DOB	Relationship	Medicare	Effective Date	
Edit	████████	████████	████████	Wife	N	04/01/2017	Terminate

[Add Dependent]

Insurance

	Benefit Type	Ben Eff Date	Associated To	Ins Type	Cov Code	Mbr Prem	Subsidy Only	Effective Date	
Add Ins	Deferred Vested	02/01/2017							

2. From the Insurance section, you can add coverage information for a spouse and other dependent listed in the Dependents section (See "Adding Dependents"). Click on **Add Ins.**

Insurance

	Benefit Type	Ben Eff Date	Associated To	Ins Type	Cov Code	Mbr Prem	Subsidy Only	Effective Date	
Add Ins	Deferred Vested	02/01/2017							
			████████	Health	GROUP C - MEDI	$ 231.11	N	04/01/2017	Delete

3. When you click on **Add Ins** this screen will appear:
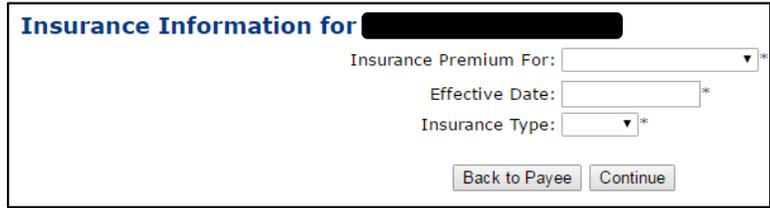
4. Select the dependent's name from the names listed in the drop-down menu field next to **Insurance Premium For:**

5. Type in the **Effective Date**. The effective date will be the month in which you are working in. For example, if you are keying insurance for April use "04/01/2017."

> **Note:** The "/01/" will automatically prefill; just type in the Month (04) and year (2017).

6. For this example, we will select Health from the **Insurance Type** drop-down menu. Click **Continue**.

> **Note**: If you click on **Back to Payee** you will lose what you have done so far.
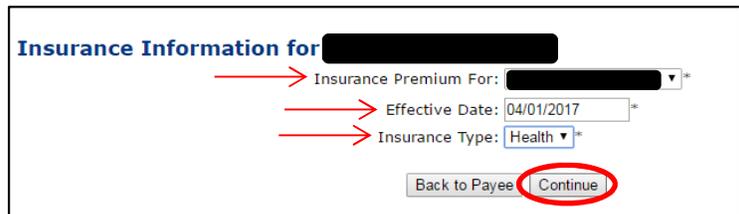
7. Choose the **Coverage Description** from the drop-down list of all coverage types associated with the employer, and then click **Continue**.

> **Note:** If you are not sure what to select you can refer back to the Insurance Active Rate report listed in your Reports section. (See, "Getting Started").
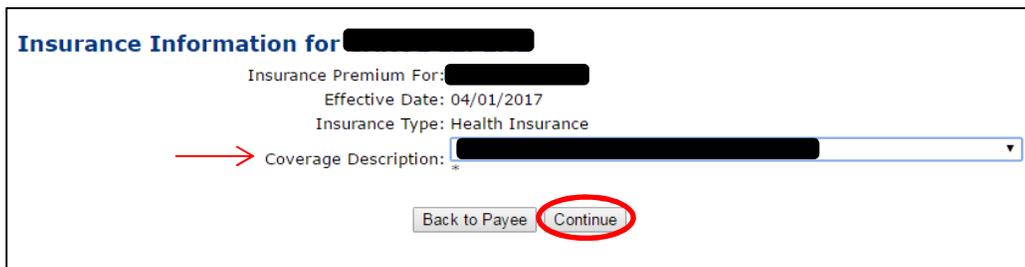
8. After you click **Continue**, the following screen will appear. Review all the information listed on this screen. If everything is correct, click on **Save Insurance Info**. If the information is incorrect, click on **Back to Payee** and re-enter the correct information.

> **Note:** If any information requires review approval by an NHRS Medical Benefits Analyst, you will not see the changes until they are approved. The queue is checked throughout the day, however if you need an item approved right away, please call an NHRS Medical Benefits representative at (603) 410-3675.

9. Once your items have been approved, your screen will look like this:

[Back to index](#)

Adding a Medicare Card for a Retiree or Dependent

Some screenshots in these instructions may appear slightly different on your computer. This is due to browser differences (i.e. Internet Explorer vs Chrome, etc.). It should not affect how you set up insurance. However, if you see a different screen and are unsure how to proceed, please contact an NHRS Medical Benefits representative at (603) 410-3675 for further assistance.

FOR A RETIREE:

1. To add Medicare information for the retiree, click on the **Update Medicare Information** button.

2. When you click **Update Medicare Information,** you will see a screen that looks like this. Type in the Medicare information listed on the card; the eligible dates will always be the first of a month:

3. Once done, click **Save Medicare Info.** The command buttons on the screen will change. To upload the Medicare card, click on **Upload Files**. (You can also print the screen for your records.)

4. When you click on **Upload Files** you will see a screen that looks like this:

5. Click on **Choose File** and select the file saved on your computer.
    Note: The file must be saved as one of the following file types: .BMP, .JPEG, .JPG, .PDF, .PNG, .TIF, .TIFF, or .TXT.

6. Once you have selected the file, click on **Upload File.** If the file upload was successful, you will see the following screen.
    a. This item has now been queued and is awaiting approval from a Medical Benefits representative at NHRS.

7. From this screen, you will have the choice to go **Back to Payee**, upload **More Files** or **Print Screen**.

8. When you are done, click on **Back to Payee** to return to the Payee Benefit Information screen.

FOR A DEPENDENT:

1. When a spouse or dependent acquires a Medicare Card, click **Edit** in the Dependents section next to the person whose record you intend to update.

2. You will be brought to this screen. Fill in the Medicare #, Part A Elig Date, and Part B Elig Date. The Effective Date will stay as is. (This is when the dependent record was created). Then click **Save Dependent Info**.

3. The command buttons on the screen will change. To upload the Medicare card, click on **Upload Files**. (You can also print the screen for your records.)

> **Note:** The file must be saved as one of the following file types: .BMP, .JPEG, .JPG, .PDF, .PNG, .TIF, .TIFF, or .TXT.

4. When you click on **Upload Files** you will see a screen that looks like this:

5. Click on **Choose File** and select the file saved on your computer. Once you have selected the file, click on **Upload File.**

> **Note:** The file must be saved as one of the following file types: .BMP, .JPEG, .JPG, .PDF, .PNG, .TIF, .TIFF, or .TXT.

   a. If the file upload was successful, you will see the following screen. This item has now been queued and is awaiting approval from a Medical Benefits representative at NHRS.

6. From this screen, you will have the choice to go **Back to Payee**, upload **More Files** or **Print Screen**.

7. When you are done, click on **Back to Payee** to return to the Payee Benefit Information screen.

Changing to a Medicare Plan (For a Dependent)

Some screenshots in these instructions may appear slightly different on your computer. This is due to browser differences (i.e. Internet Explorer vs Chrome, etc.). It should not affect how you set up insurance. However, if you see a different screen and are unsure how to proceed, please contact an NHRS Medical Benefits representative at (603) 410-3675 for further assistance.

1. When a spouse or dependent acquires a Medicare Card, click **Edit** in the Dependents section next to the person whose record you intend to update.

2. You will be brought to this screen. Fill in the Medicare #, Part A Elig Date, and Part B Elig Date. The Effective Date will stay as is. (This is when the dependent record was created). Then click **Save Dependent Info**.

3. The command buttons on the screen will change. To upload the Medicare card, click on **Upload Files**. (You can also print the screen for your records.)

Dependent Information Result for ▮▮▮▮▮▮▮▮▮
A Medical Benefit representative will review the queued changes for approval. Please print screen for your records. Select "Upload Files" to upload the required document(s) supporting this change.

Relationship: Wife ▾ *   Medicare #: ▮▮▮▮▮▮▮
First: ▮▮▮▮▮▮ *   Part A Elig Date: 04/01/2017
Last: ▮▮▮▮▮ *   Part B Elig Date: 04/01/2017
SSN: ▮▮▮▮▮ *   Effective Date: 02/01/2016 *
Birth Date: ▮▮▮▮▮ *   Termination Date:
Disabled: ☐   Termination Reason: ▾
Full Time Student: ☐

Upload Files...   Print Screen

4. When you click on **Upload Files** you will see a screen that looks like this. Click on **Choose File** and select the file saved on your computer. Once you have selected the file, click on **Upload File.**

> **Note:** The file must be saved as one of the following file types: .BMP, .JPEG, .JPG, .PDF, .PNG, .TIF, .TIFF, or .TXT.

Medicare File Upload
Select the file(s) supporting the desired change (Medicare Card or Letter from Soc Sec). If more than one file is needed, you will be prompted after uploading this file.

Choose File | No file chosen

Upload File

Back to Payee

> **Note:** If the file upload was successful, you will see the following screen. This item has now been queued and is awaiting approval from a Medical Benefits representative at NHRS.

5. From this screen, you will have the choice to go **Back to Payee**, upload **More Files** or **Print Screen**. When you are done, click on **Back to Payee** to return to the Payee Benefit Information screen and change the insurance coverage for the dependent.

File Upload Successful

File ▮▮▮▮▮▮▮▮ pdf was uploaded and associated to this queued action.

If you need to upload another file to support this change, click on "More Files".

Please print screen for your records. A Medical Benefit representative will review the queued changes and uploaded documents for approval. Return to the Payee Benefit Information screen by selecting Back to Payee.

Back to Payee   More Files...   Print Screen

6. Since the spouse has turned 65, he or she will likely be changing to a Medicomp Supplemental plan. Click **Terminate** on the insurance premium that is currently attached to the spouse.

Insurance

	Benefit Type	Ben Eff Date	Associated To	Ins Type	Cov Code	Mbr Prem	Subsidy Only	Effective Date	
Add Ins	Service Retirement	06/01/2015							
			██████	Health	GROUP A- MEDI	$ 428.36	N	02/01/2016	Terminate
			██████	Health	GROUP A- 1PER	$ 710.05	N	02/01/2016	Terminate
			██████	Dental	GROUP D- 2PER	$ 106.60	N	02/01/2016	Terminate

Note: Please be aware that ANYTIME you terminate a premium you will receive the message below. If you are not setting up a new premium, or there will be a gap in coverage, this message explains that the member will no longer be eligible to receive the NHRS Medical Subsidy. <u>If you are terminating one premium to replace it with another, you must make both changes in succession.</u>

Terminate Insurance Verify for ██████████

Rates
- Change
- Terminate
- Reactivate
- Add Brand New

Authorizations
- Search for SSN
- Queued Items
- All Queued Items

Reports
- Ins Deduction Register
- Insurance Active Rate

PLEASE NOTE:

Qualified retirees who decline the Medical Subsidy because of health insurance coverage through another employer-sponsored plan will be permitted to return to the former employer's plan in order to receive the medical subsidy when the retiree is no longer eligible for the other employer-sponsored health insurance coverage.

Qualified retirees who discontinue coverage under the plan sponsored by the former employer for any other reason will **not** be eligible for the medical subsidy if the retiree subsequently returns to coverage.

Terminate insurance: 1 Person Health Insurance GROUP I - 1 PER? Click **Yes** to terminate, **No** to cancel.

[Yes] [No]

7. Your **Termination Date** will always be the first of the month that the change is taking effect.

> **Note:** The program will automatically revert the date to the last day of the previous month.

When a member or a dependent turns 65 or becomes Medicare eligible, choose **Age Ineligible** from the drop-down menu as the reason for termination. Click **Save Insurance Info.** The screen will refresh, then click **Back to Payee.**

8. Click **Add Ins** to set up the new Medicomp premium.

> **Note:** If the termination is in the current payroll period, you will see that there is no longer insurance information listed for the person you terminated. If you are making the change for a future date, the insurance information will be listed until the effective date of the termination.

	Benefit Type	Ben Eff Date	Associated To	Ins Type	Cov Code	Mbr Prem	Subsidy Only	Effective Date	
Add Ins	Service Retirement	06/01/2015							
				Health	GROUP A-MEDI	$ 428.36	N	02/01/2016	Terminate
				Dental	GROUP D-2PER	$ 106.60	N	02/01/2016	Terminate

9. From the Insurance Premium For field, choose the spouse's name from the drop-down menu. Type in the **Effective Date** (always the first of a month). For the **Insurance Type** field, choose "Health" from the drop-down menu. Click **Continue**.

10. From the drop-down menu, select the **Coverage Description** that matches the premium for the person you selected on the previous screen. Click **Continue**.

> **Note:** If you are unsure of the Coverage Description please refer back to your Insurance Active Rate report listed in the Reports section on the left-hand side of your screen.

11. If the information on the results screen is correct, first click **Save Insurance Info**, then click **Back to Payee.**

> **Note:** If you hit **Back to Payee** before saving, the changes will be lost.

All Medicomp plans will be queued for an NHRS Medical Benefits representative to review and approve. Once approved, you will see the new changes in the Payee's record. As you can see in the Dependents section, there is now a **Y** indicating that there is a Medicare card on file for this dependent.

Note: Users will only receive notification of queued items that have been **Denied** or **Need More Information**. No notifications are sent out for **Approved** items.

You will also notice that there is a **Delete** option next to the premium you just added. If you have added the incorrect premium or attached it to the wrong person, click **Delete** and begin again.

Dependents

	Name	SSN	DOB	Relationship	Medicare	Effective Date	
Edit	████	████	████	Wife	Y	02/01/2016	Terminate

Add Dependent

Insurance

	Benefit Type	Ben Eff Date	Associated To	Ins Type	Cov Code	Mbr Prem	Subsidy Only	Effective Date	
Add Ins	Service Retirement	06/01/2015							
			████	Health	GROUP A-MEDI	$ 428.36	N	02/01/2016	Terminate
			████	Dental	GROUP D-2PER	$ 106.60	N	02/01/2016	Terminate
			████	Health	GROUP A-MEDI	$ 428.36	N	04/01/2017	Delete

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Change from a 2-Person Plan to 2 Separate Plans

To change a benefit from a two person plan into two separate plans, follow the steps below.

Note: If this change is due to a member or dependent acquiring a Medicare card, work top to bottom and add the Medicare card first.

1. To add Medicare information for a retiree, click **Update Medicare Information.** To update Medicare information for a dependent, click **Edit** next to the dependent's name. See, *Adding a Medicare Card for a Retiree or Dependent* for additional instructions.

2. Once the Medicare card has been added, click **Terminate** next to the two person insurance premium.

3. a. Use the current, or a future, payroll date for the **Termination Date.**
   b. Because the person in this example is eligible for Medicare, enter a **Termination Reason** of "Age Ineligible."
   c. Click **Save Insurance Info** and then **Back to Payee**.

> **Note:** If the spouse is eligible for the Medical Subsidy, you will encounter an additional screen. If you are terminating one premium to replace it with another, you must make both changes at the same time. If there is a gap in coverage, the member will no longer be eligible to receive the NHRS Medical Subsidy. See, *Terminating Insurance* for more information.

4. Click **Add Ins** and follow the prompts. Change the retiree coverage first.

> **Note:** If there is more than one Benefit Type listed, always use the retirement benefit when adding new insurance premiums. If you are unsure of which benefit to use, call a Medical Benefits representative at 603-410-3675.

5. a. From the Insurance Premium For field, choose the retiree's name from the drop-down menu.
   b. Type in the **Effective Date** (always the first of a month).
   c. For the **Insurance Type** field, choose "Health" from the drop-down menu.
   d. Click **Continue**.

6. Select the **Coverage Description** that matches the premium for the person you selected on the previous screen. Click **Continue**.

> **Note:** If you are unsure of the **Coverage Description** please refer back to your Insurance Active Rate Report listed in the Reports section on the left side of your screen.

7. After you click **Continue**, the screen will refresh to show the information you entered. If all the information on the results screen is correct, click **Save Insurance Info**. If the change you made was for Medicomp, it will be queued for review by an NHRS Medical Benefits representative. Click **Back to Payee** to continue with the insurance premium change for the dependent.

8. Once you have completed the process for the dependent and all items have been approved from the queue, you will see the new coverage information on the Payee's Benefit Information screen.

Terminating Insurance for a Retiree or Dependent

Some screenshots in these instructions may appear slightly different on your computer. This is due to browser differences (i.e. Internet Explorer vs Chrome, etc.). It should not affect how you set up insurance. However, if you see a different screen and are unsure how to proceed, please contact an NHRS Medical Benefits representative at (603) 410-3675 for further assistance.

For terminating a dependent's insurance due to death or divorce of a spouse, see "Death or Divorce of Spouse."

1. To terminate a retiree or dependent's insurance, go to the Insurance section on the Payee Benefit Information page.
2. Click **Terminate** on the appropriate retiree or dependent's coverage. In this example, we are terminating the retiree's health insurance.

Insurance

	Benefit Type	Ben Eff Date	Associated To	Ins Type	Cov Code	Mbr Prem	Subsidy Only	Effective Date	
Add Ins	Early Retirement	07/01/2009							
			⬛	Dental	GROUP B - 2 PER	$ 86.65	N	07/01/2009	Terminate
			⬛	Health	GROUP I - 1 PER	$ 863.00	Y	06/01/2016	Terminate
			⬛	Health	GROUP I - 1 PER	$ 863.00	Y	06/01/2016	Terminate

3. Please note that anytime you **Terminate** a premium you will receive the following message. Click **Yes** to proceed.

Terminate Insurance Verify for ⬛

PLEASE NOTE:

Qualified retirees who decline the Medical Subsidy because of health insurance coverage through another employer-sponsored plan will be permitted to return to the former employer's plan in order to receive the medical subsidy when the retiree is no longer eligible for the other employer-sponsored health insurance coverage.

Qualified retirees who discontinue coverage under the plan sponsored by the former employer for any other reason will **not** be eligible for the medical subsidy if the retiree subsequently returns to coverage.

Terminate insurance: 1 Person Health Insurance GROUP I - 1 PER? Click **Yes** to terminate, **No** to cancel.

Yes No

Note: If you are terminating one premium to replace it with another, you should make both changes at the same time to avoid a potential gap in coverage. (This is particularly important in regard to retirees and beneficiaries receiving the NHRS

Medical Subsidy.) If you are not setting up a new premium or there will be a gap in coverage, this message explains the potential impact on the retiree or beneficiary. If you have questions regarding this message, please contact an NHRS Medical Benefits representative at (603) 410-3675.

4. After selecting **Yes**, you will be brought to this screen.
   a. Enter a **Termination Date.**
      Note: Always use the 1st day of the payroll month you are working in. For terminations, the system will automatically adjust it the last day of the previous month. (ex: 04/01/2017 reverts to 03/31/2017).
   b. Enter the **Termination Reason** from the drop-down menu, in this case we will use **Member Requested Cancellation**.
   c. Click **Save Insurance Info**.
   d. Click **Back to Payee** to return to the Payee Benefit Information page.

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Death or Divorce of Spouse

Some screenshots in these instructions may appear slightly different on your computer. This is due to browser differences (i.e. Internet Explorer vs Chrome, etc.). It should not affect how you set up insurance. However, if you see a different screen and are unsure how to proceed, please contact an NHRS Medical Benefits representative at (603) 410-3675 for further assistance.

When a spouse or dependent passes away, or in the event of a divorce, you will follow the same process. You will need to update the insurance information on the member's record.

Always use the current payroll, except: for retro (NHRS Subsidy) purposes, you will want to use a Retro Date of the month in which the event happened (unless it happened on the last business day of the month).

Ex: Date of Death 03/21/2017, Retro Date 03/01/2017.

> **Note:** For this process, you must start from the bottom of the Payee Benefit Information screen under insurance and work your way up. You will receive the error message below if you attempt to terminate the dependent before terminating the insurance.
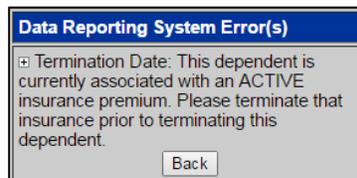
1. Start with terminating the insurance for the spouse or dependent.

2. a. Here you will want to use the current, or a future, payroll date for the **Termination Date**.
   b. Include the **Termination Reason**.

   > **Note:** If the event happened prior to the payroll date, include a **Retro Date** and **Retro Note** with a brief explanation as to why you are requesting the retro NHRS subsidy payment.

   c. If all the information appears correct, click **Save Insurance Info**.

3. Once saved, click **Upload Files**. Here you will want to include a divorce decree or death certificate as these items are needed for review by a Medical Benefits representative.

4. a. Click **Choose File** and select the appropriate file from your computer.

        Note: The file must be saved as one of the following file types: .BMP, .JPEG, .JPG, .PDF, .PNG, .TIF, .TIFF, or .TXT.

   b. Click **Upload File**.

   c. Once you have uploaded the file, click **Back to Payee** to return to the Payee Benefit Information screen and continue updating the insurance information.

5. In the Dependents section, click **Terminate** next to the appropriate name.

6. Fill in the **Termination Date** and **Termination Reason**, then click **Save Dependent Info**. (The date will revert back to the last business day of the previous month).

Dependent Information Result for ███████████
Dependent information has been successfully updated. No further action required.

Relationship: Husband ▼ *		Medicare #: ███████	
First: ████ *		Part A Elig Date: 04/01/2014	
Last: ████ *		Part B Elig Date: 04/01/2014	
SSN: ████ *		Effective Date: 07/01/2007 *	
Birth Date: ████ *	→	Termination Date: 03/31/2017	
Disabled: ☐	→	Termination Reason: Divorce ▼	
Full Time Student: ☐			

Back to Payee   Save Dependent Info

Note: All terminations of coverage due to death or divorce will be queued for a NHRS Medical Benefits representative to review and approve. Once approved, you will see the changes in the Payee record.

Payee Benefit Information
Add, Edit or Terminate benefit information below or call a Medical Benefit Representative at (603) 410-3675 for assistance

Rates
- Change
- Terminate
- Reactivate
- Add Brand New

Authorizations
- Search for SSN
- Queued Items
- All Queued Items

Reports
- Ins Deduction Register
- Insurance Active Rate

Fund Options
- Select Carrier
- Select Module
- Help
- Change Password
- Logout

SSN: ███████

Name: ████	DOB: ████	Gender: Female
Medicare#:	Part A Eligible Date:	Part B Eligible Date:

Update Medicare Information

Dependents

	Name	SSN	DOB	Relationship	Medicare	Effective Date	

Add Dependent

Insurance

	Benefit Type	Ben Eff Date	Associated To	Ins Type	Cov Code	Mbr Prem	Subsidy Only	Effective Date	
Add Ins	Early Retirement	07/01/2007							
			████	Health	363056024- 1 PER	$ 770.55	N	06/01/2016	Terminate

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Continuance Benefit - Retro Add (Medical Subsidy)

Some screenshots in these instructions may appear slightly different on your computer. This is due to browser differences (i.e. Internet Explorer vs Chrome, etc.). It should not affect how you set up insurance. However, if you see a different screen and are unsure how to proceed, please contact an NHRS Medical Benefits representative at (603) 410-3675 for further assistance.

When a member dies and leaves a monthly benefit for the surviving spouse, the insurance deductions do not automatically carry over. Once the Continuance Benefit is set up by NHRS, you will be able to add the insurance deductions to the surviving spouse's new record.

> **Note:** Retroactive application is for NHRS Medical Subsidy purposes ONLY. NHRS cannot retroactively pay payee deductions.

1. Go to the Insurance section on the Payee Benefit Information page. Click **Add Ins**.

   > **Note:** For Group II (Police and Fire) surviving spouses, always use Automatic Spouse Continuance as the benefit type, even if there is more than one benefit type.

2. You will be brought to the **Insurance Information for …** screen.
   a. Specify who the **Insurance Premium** is for.
   b. Enter the **Effective Date.**
      Note: Always use the current payroll date as the **Effective Date**. If you use the retroactive date to add insurance, you will receive an error message. (See below).

   Data Reporting System Error(s)

   ⊞ Effective Date: The effective date is prior to the current month. Please correct the effective date; continue to add insurance; provide a retroactive date and further information in the note field prior to saving insurance information. This will be queued for further review by a Medical Benefit Representative.

   Back

   c. Enter the **Insurance Type**.
   d. Click **Continue.**

   Insurance Information for
   → Insurance Premium For:
   → Effective Date: 04/01/2017 *
   → Insurance Type: Health ▼ *

   Back to Payee   Continue

3. Choose the **Coverage Description** from the drop-down list of all coverage types associated with the employer. Click **Continue.**

   Note: If you are not sure what to select you can refer back to the Insurance Active Rate report listed in your Reports section. (See, "Getting Started").

   Insurance Information for
   Insurance Premium For:
   Effective Date: 04/01/2017
   Insurance Type: Health Insurance
   → Coverage Description: *

   Back to Payee   Continue

4. You will be brought to this screen.
   a. Enter the **Retro Date**.
      Note: Retro Date should be the first of the month that the life event happened in.
   b. In the **Retro Note** section provide a brief explanation as to why you are requesting retro NHRS subsidy payments.
      Note: Once approved by an NHRS Medical Benefits representative, this note will be automatically added to the payee's permanent record.
   c. Click **Save Insurance Info**.

5. Once the retro date and retro note are saved, the command buttons on the screen will change. You will need to upload a signed *Annuity Deduction Authorization* form, which is required for all new insurance additions. Click **Upload Files**.

6. When you click on **Upload Files** you will see a screen that looks like this:
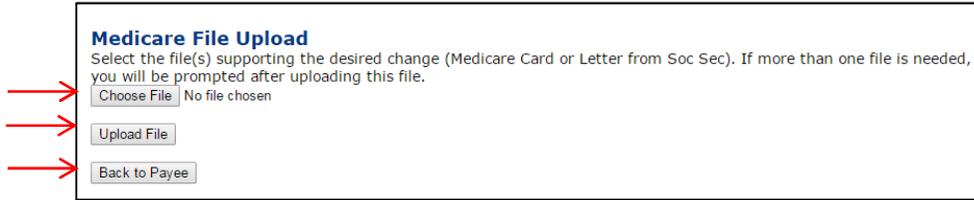
7. Click on **Choose File** and select the file saved on your computer. Once you have selected the file, click on **Upload File.**

    > **Note:** The file must be saved as one of the following file types: .BMP, .JPEG, .JPG, .PDF, .PNG, .TIF, .TIFF, or .TXT.

    a. If the file upload was successful, you will see the following screen. This item has now been queued and is awaiting approval from a Medical Benefits representative at NHRS.
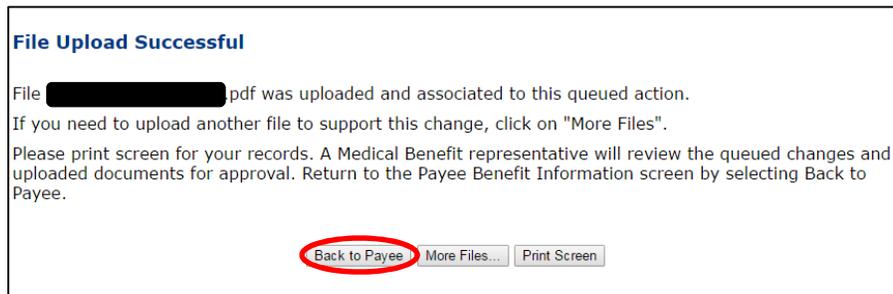
8. Click **Back to Payee** to return to the Payee Benefit Information page.

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Changing From Medical Subsidy Only to Having Deductions

When a member has ZERO insurance deductions from his or her pension benefit, but is in receipt of the NHRS Medical Subsidy, you will see a Y indicator in the Subsidy Only column. These instructions show how to change a member from Subsidy Only to having deductions.

1. Start by terminating the current premiums that will now require deductions. Click **Terminate**.

Insurance

	Benefit Type	Ben Eff Date	Associated To	Ins Type	Cov Code	Mbr Prem	Subsidy Only	Effective Date	
Add Ins	Early Retirement	07/01/2009							
			■■	Dental	GROUP B - 2 PER	$ 86.65	N	07/01/2009	Terminate
			■■	Health	GROUP I - 1 PER	$ 863.00	Y	06/01/2016	Terminate
			■■	Health	GROUP I - 1 PER	$ 863.00	Y	06/01/2016	Terminate

Note: Please be aware that ANYTIME you terminate a premium you will receive the message below. If you are not setting up a new premium there will be a gap in coverage; this message explains that the member will no longer be eligible to receive the NHRS Medical Subsidy. If you are terminating one premium to replace it with another, you must make both changes in succession.

Rates
- Change
- Terminate
- Reactivate
- Add Brand New

Authorizations
- Search for SSN
- Queued Items
- All Queued Items

Reports
- Ins Deduction Register
- Insurance Active Rate

Terminate Insurance Verify for ■■■■

PLEASE NOTE:

Qualified retirees who decline the Medical Subsidy because of health insurance coverage through another employer-sponsored plan will be permitted to return to the former employer's plan in order to receive the medical subsidy when the retiree is no longer eligible for the other employer-sponsored health insurance coverage.

Qualified retirees who discontinue coverage under the plan sponsored by the former employer for any other reason will **not** be eligible for the medical subsidy if the retiree subsequently returns to coverage.

Terminate insurance: 1 Person Health Insurance GROUP I - 1 PER? Click **Yes** to terminate, **No** to cancel.

[Yes] [No]

2. a. Enter a **Termination Date.**

b. Enter a **Termination Reason.**

c. Click **Save Insurance Info.** (The date will revert back to the last business day of the previous month).

> **Note:** If you click on Back to Payee before saving you will lose what you have done so far.

d. Click **Back to Payee**.

3. Once you are back to the payee's record, click on **Add Ins.**

4. a. Specify who the **Insurance Premium** is for.

b. Enter the **Effective Date.** (The **Effective Date** is always the current, or a future, payroll date).

c. Enter the **Insurance Type**.

d. Click **Continue.**

5. Select the **Coverage Description** that matches the premium for the person you selected on the previous screen.

> **Note:** If you are unsure of the **Coverage Description** please refer back to your Insurance Active Rate report. See *Getting Started* for instructions to access this report.

6. Click **Continue**.

7. Click **Save Insurance Info**.

8. Once the insurance is added, click **Back to Payee** to see the new premiums in the Insurance Grid.

> **Note:** If the premium information you entered is incorrect, you have the option to **Delete** the premium before the 20th of the month and enter corrected information.

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Changing from one Medicomp Premium or Group Number to Another (for TPAs)

Note: When only making premium or group number changes, premium type stays the same.

1. Once in a member's record, click **Terminate** for the insurance premium you are making changes to.

	Benefit Type	Ben Eff Date	Associated To	Ins Type	Cov Code	Mbr Prem	Subsidy Only	Effective Date	
Add Ins	Service Retirement	06/01/2011							
			██████	Health	363041065-2-PER	$ 1,758.95	N	01/01/2017	Terminate
			██████	Health	363041059-MEDI	$ 537.18	N	01/01/2017	Terminate

2. Please note that anytime you **Terminate** a premium you will receive the following message. Click **Yes** to proceed.

Terminate Insurance Verify for ████████

PLEASE NOTE:

Qualified retirees who decline the Medical Subsidy because of health insurance coverage through another employer-sponsored plan will be permitted to return to the former employer's plan in order to receive the medical subsidy when the retiree is no longer eligible for the other employer-sponsored health insurance coverage.

Qualified retirees who discontinue coverage under the plan sponsored by the former employer for any other reason will **not** be eligible for the medical subsidy if the retiree subsequently returns to coverage.

Terminate insurance: 1 Person Health Insurance GROUP I - 1 PER? Click **Yes** to terminate, **No** to cancel.

Yes No

Note: If you are terminating one premium to replace it with another, you should make both changes at the same time to avoid a potential gap in coverage. (This is particularly important in regard to retirees and beneficiaries receiving the NHRS Medical Subsidy.) If you are not setting up a new premium or there will be a gap in coverage, this message explains the potential impact on the retiree or beneficiary. If you have questions regarding this message, please contact an NHRS Medical Benefits representative at (603) 410-3675.

3. After selecting **Yes**, you will be brought to this screen.
   a. Enter a **Termination Date.**
      Note: Always use the 1st day of the payroll month you are working in. For terminations, the system will automatically adjust it the last day of the previous month. (ex: 04/01/2017 reverts to 03/31/2017).
   b. Enter the **Termination Reason** from the drop-down menu, in this case we will use **Member Requested Cancellation**.
   c. Click **Save Insurance Info**.

4. Click **Back to Payee** to continue with your changes.

5. Once back on the Payee's Benefit Information screen, click **Add Ins** for the new premium and group number for the person you just terminated.

6. Select the previously terminated person's name from the names listed in the drop-down menu field next to **Insurance Premium For:**

7. Type in the **Effective Date**. The effective date will be the month in which you are working in. For example, if you are keying insurance for April use "04/01/2017."
   > **Note:** The "/01/" will automatically prefill; just type in the Month (04) and year (2017).

8. Then select a plan from the **Insurance Type** drop-down menu. In some cases, there may be more than one option (i.e. "health," "dental," "vision," etc.) In this case select health. Click **Continue**.
   > **Note**: If you click on **Back to Payee** you will lose what you have done so far.

9. Select the **Coverage Description** that matches the premium for the person you selected on the previous screen.
   > **Note:** To select the correct new premium, start with the description column on the active rate report, which is sorted by name or number of the associated employer, then by Group Number/Coverage Code. If you are unsure of the **Coverage Description** please refer back to the Insurance Active Rate Report listed in the Reports section on the left side of your screen. (See, "Getting Started").

10. If the information on your results screen is correct, click **Save Insurance Info**.
    > **Note:** All Medicomp plans are automatically queued and require approval by an NHRS Medical Benefits representative before you will see results on the Payee's Benefit Information screen.

11. Click **Back to Payee** to return to the Payee's Benefit Information screen.