

Partner Access Insurance and Union Deduction Procedure - Add Record

Summary

This procedure explains how to manually create the Insurance and Union Deductions Data Collection using the Add Record method via Partner Access. This data collection is created when a retiree has a revision or termination of their insurance deduction. To start the initial set-up of the deduction, a 7.10 form (Health Insurance Continuation Through Employer) will still need to be submitted for the retiree. Any revisions or terminations after this will be done by creating a Data Collection.

Steps

The procedure is as follows:

1. Navigate to the **Left-hand Tool Bar**.
 - a. From the left tool bar, click the **Business Functions** (graph) icon.
 - b. Click **Data Collections**.
 - c. Click **Create Data Collection**.
 - d. Complete the following fields in the **1. Definition** tab:
 - **Data Type:** Determines the type of workflow (e.g., **Insurance and Union Deductions**)
 - **Partner Code**
 - **Effective Date**
 - **Data Collection Name:** For record-keeping purposes, we recommend naming the Data Collection with the following information:
DC-[data collection type]_[current date]- Retiree first and last name – Member ID
 - e. Click **Save and Continue**.
2. Click **Add Record** to create the Insurance and Union Deductions Data Collection manually.
 - a. Complete the following fields in the **2. Add Member Data** tab:
 - Items with an asterisk are mandatory.
 - Enter:
 - Member Information
 - **Social Security Number**
 - **Member ID** (if applicable)
 - **First Name**
 - **Last Name**

- Deduction Information
 - **Deduction Type** (select from dropdown menu, see chart below)
 - **Amount:** This field is NOT mandatory when terminating a deduction.
 - **Deduction Effective Date:** Must be the 1st day of the following month. This field is NOT mandatory when terminating a deduction.
 - **Deduction Termination Date:** Must be the last day of the following month. This field is NOT mandatory when revising a deduction.
 - **Retroactive Indicator:** **For more information on how to set up a retroactive deduction, please refer to the end of this procedure.**
 - b. Click **Save**.
- 3. Click **Add Record** to enter another retiree, repeat instructions from step 2. until all retirees are added to the data collection.
- 4. Click **Validate** to begin the validation process in the **3. Validate Member Data** tab. In this step, data is validated against formatting and business requirements. Respond to the errors and/or warnings and close the **Member Summary**. Once all exceptions have been resolved, click **Continue**.
 - a. Errors will show in **RED**, and warnings will show in **ORANGE**, with the total number of issues for each member. On the right-hand side of your screen, you have the option to check the box for the specific error/warning to view the members that were impacted as such. This allows you to filter by error/warning.
 - b. **To respond to an ERROR**, click the row of the member's name to highlight and open the Member Summary to the right.
 - Click **View Member Data** to make any necessary changes and corrections. After the correction is made, click **Save and Validate**.
 - Click **Postpone Member** to save the member in a Data Collection to be submitted later. In the pop-up window, enter an explanation regarding the reason why the member is being postponed, then click **Save**.
 - Click **Reject Member** to remove the member from the data collection. In the pop-up window, enter an explanation regarding the reason why the member is being rejected, then click **Save**.
 - c. **To respond to a WARNING**, click the row of the member's name to highlight and open the Member Summary to the right. You then will need to complete one of the four options below to address the warning.
 - Click **View Member Data** to make any necessary changes and corrections. After the correction is made, click **Save and Validate**.

- Click **Approve Warning**. In the pop-up window, click the drop-down arrow to indicate a reason to approve the warning. Click **Save**.
 - Click **Postpone Member** to save the member in a Data Collection to be submitted later. In the pop-up window, enter an explanation regarding the reason why the member is being postponed, then click **Save**.
 - Click **Reject Member** to remove the member from the data collection. In the pop-up window, enter an explanation regarding the reason why the member is being rejected, then click **Save**.
5. From the **4. Review & Submit** tab review the listed Data Collection, Data Entry Summary and Reports. Once review is complete, click **Submit** to finalize filing the Data Collection.

Steps for setting up a retroactive deduction

There may be instances where a retiree’s deduction was not set up in time or the deduction organization needs to “catch up” on a deduction when comparing the amount withheld by IMRF. To correct this, the **Retroactive Indicator** can be applied on the data collection. The information below will provide helpful information on using the Retroactive Indicator and an example on how to use it.

- When the Retroactive Indicator is marked with a Y, you must enter a Deduction Effective Date AND a Deduction Termination Date. For the Deduction Effective Date, you must use the 1st day of the following month. For the Deduction Termination Date, you must use the last day of the following month.
- When the Retroactive Indicator is marked with a Y, the amount entered for that deduction will be IN ADDITION TO the deduction amount IMRF currently has on file for the month entered.

EXAMPLE: The retiree’s 7.10 form for a deduction was set up with a start date of 04-01-2024. However, the form was not sent to IMRF in time. Therefore, the deduction was not taken out of the retiree’s April 2024 check, but the deduction organization paid this amount towards the retiree’s health insurance plan. In this example, the deduction organization noted the deduction to be \$50 on the 7.10 form.

Since the \$50 deduction was NOT withheld on the April 2024 check, the deduction organization can submit a data collection to be effective for the May 2024 check for this retiree.

- Amount: \$50
- Deduction Effective Date: 05-01-2024
- Deduction Termination Date: 05-31-2024
- Retroactive Indicator: Y

By completing this, the system will withhold \$50 for the retroactive indicator noted **PLUS** the \$50 deduction that has already been set up in the system with the 7.10 form. This would make the total deduction amount come out to \$100. The amounts are now balanced between the deduction organization and IMRF. For the June 2024 payment, the system would revert to deducting only \$50 since this is the deduction amount that is still set up in the system.

What if the deduction organization had IMRF set up a deduction to be withheld from the member in error? What steps should be taken to correct this?

The system does not allow for a negative amount to be entered in the AMOUNT field. Therefore, to balance the amounts between the employer and IMRF, we suggest completing a data collection for the next month and entering the following information:

- Amount: 0
- Deduction Effective Date: 05-01-2024
- Deduction Termination Date: N/A
- Retroactive Indicator: N

For the following month, the deduction organization should complete another data collection to restart the deduction amount originally set up. For this example, the original deduction amount is \$50.

- Amount: 50.00
- Deduction Effective Date: 06-01-2024
- Deduction Termination Date: N/A
- Retroactive Indicator: N

This procedure is complete.

Charts:

Items are available from the drop-down box per Partner benefits offered:

Type	Description
HI	HEALTH INSURANCE
LI	LIFE INSURANCE
LTC	LONG-TERM CARE INSURANCE
DI	DENTAL INSURANCE
VC	VISION CARE
MISC	MISCELLANEOUS
RX	PRESCRIPTION CARD