Insurance and Union Dues Data Collection

Business Objective:

This data collection is used to submit a retiree's deduction **changes or to terminate deductions**.

This file should be submitted to IMRF as needed to update IMRF deduction information. An IMRF form (Deduction form) must be on file and deductions established before this data collection can be used to update a member's deduction amounts or to terminate deduction instruction.

To establish an insurance deduction for a retiree, the IMRF form 'Health Insurance Continuation Through Employer – Premium Deduction Authorization' must be submitted. The member can request this form through by reaching out to Member Services at 1 800 ASK IMRF or Secure Message through their Member Access Account.

Selection Logic

Only members with a change to their deduction amount, including termination of deduction, should be included on this file.

Member's first establishing a deduction, or those for which the deduction has already been terminated should not be on this file.

Do not use a DeductionTerminationDate unless the member will no longer have health insurance deductions being paid to your employer. If a deduction is terminated, a new Health Insurance Continuation through Employer – Premium Deduction Authorization will be required to re-establish deductions.

File Details:

- The file is in a comma (,) delimited format (.csv file).
- This file includes a header record as described in the "File Header" section in the Transaction Record Specifications.
- The order of the fields in the upload file must be as provided in the Transaction Record Specifications section.
- All fields in the Transaction Record Specifications must be included in the upload file, even if the field is not listed as Mandatory. If the Mandatory column is listed as 'No', that field can be left blank, but the field header should not be removed from the file. For example, the upload file must have a place for the MemberID, though it is not a mandatory field. This means it can be blank when uploaded, whereas the Social Security Number must be included.

Supported Data types

- Date format MM-DD-YYYY

- Decimal symbol is the period (.) symbol
- Integers are to be provided without thousand separator symbols (,)
- Characters allowed include values ranging from A to Z and 0-9 and include all special characters
- Codes are provided in the "Table of Codes" section

Transaction Record Specifications

The names, as listed, in the "Input File Header Field Name" column of the grid below should always be part of the header record of the input file to identify each field in the data collection and ensure each of them will be interpreted correctly.

File Header	Description	Mandatory	Length	Data Type	Example	Details
SocialSecurityNumber	**Social Security Number of member.**	**Yes**	**9**	**Integer**	**123456789**	
MemberID	Unique 7-digit IMRF Member Identification number with 4 preceding 0s	No	11	Integer	00001234567	This field should ONLY contain the IMRF provided MID
LastName	**Last name of member**	**Yes**	**40**	**Character**	**Smith**	
FirstName	**First name of member**	**Yes**	**40**	**Character**	**John**	
DeductionType	**Type of deduction taken from payment**	**Yes**	**7**	**Deduction Type Code**	**HI**	**HI should be the default deduction code for IMRF employers.**
Amount	Amount of deduction taken from payment	Conditional	21	Decimal	75.00	Not mandatory when terminating a deduction payment. When terminating a deduction payment, just enter DeductionTerminationDate only.
DeductionEffectiveDate	Effective date of the deduction taken from payment	Conditional	10	Date	12-31-2018	No more than 1 month in the future, from the current pay period. Not mandatory when terminating a deduction payment. When terminating a deduction payment, just enter DeductionTerminationDate only.
DeductionTerminationDate	Termination date of the deduction taken from payment	No	10	Date	12-31-2018	No more than 1 month in the future, from the last day of the current pay period. This field is only used to terminate deduction instructions or when a deduction has a known end date.
RetroactiveIndicator	**Indicates if the deduction is a temporary, ADDITIONAL deduction related to a delayed deduction update**	**Yes**	**7**	**Retroactive Deductions Code**	**N**	**Recommended default: N (No).**

Note:

The RETROACTIVE deduction is an ADDITIONAL and TEMPORARY deduction, for this reason, it is NOT recommended to create a retroactive deduction (retroactiveindicator Y), however, if choosing to do so, FIRST, set up the new regular deduction with no end date. Then set up the retroactive deduction. The retroactive deduction should have a DeductionEffectiveDate and DeductionTerminationDate.

- If **RetroactiveIndicator** is set to N then Deduction Effective Date OR Deduction Termination Date are mandatory.
- IF **RetroactiveIndicator** is set to 'Y' THEN **DeductionEffectiveDat**e AND **DeductionTerminationDat**e are mandatory.
- **DeductionAmount** is NOT mandatory when **RetroactiveIndicato**r is set to 'N' and **DeductionEffectiveDat**e is NULL and **TerminationEffectiveDate** is NOT NULL.
- When **DeductionEffectiveDate** and/or **DeductionTerminationDate** is provided the **DeductionTerminationDate** must be after the **DeductionEffectiveDate.**

The total of all deduction amounts cannot be greater than the gross amount of the IMRF benefit payment the deductee is receiving. The employer will receive a validation message if the amount cannot be taken for this reason. In this case, the member will have to pay the employer directly.

Table of Codes

Deduction Type

Data Collection Code	Description	Details
HI	HEALTH INSURANCE	

Retroactive Deductions

Data Collection Code	Description	Details
Y	YES	This code should only be used to ADD an additional (2nd), temporary deduction, recouping the difference between the prior deduction amount and a new deduction instruction when it wasn't updated in a timely manner. The regular deduction should be updated first with no end date.
N	NO	**This code is typically used.** This code should be used when updating a member's regular deduction instruction to the new amount.