QUICK START GUIDE

Montana Teachers' Retirement System

EMPLOYER INSURANCE DEDUCTION SYSTEM

Overview

- This **Quick Start Guide** is a brief overview on using the new **Employer Insurance Deduction System**.
  - Monthly Access Timeframes
  - Access the Login Page
  - Welcome Screen
  - Online Help
  - Deduction Reports
  - Updates
    - Master Deduction Codes
    - Recipient Deductions
- Detailed help for the Insurance Deduction System is available via a new Online Help manual after you login.

Monthly Access Timeframes

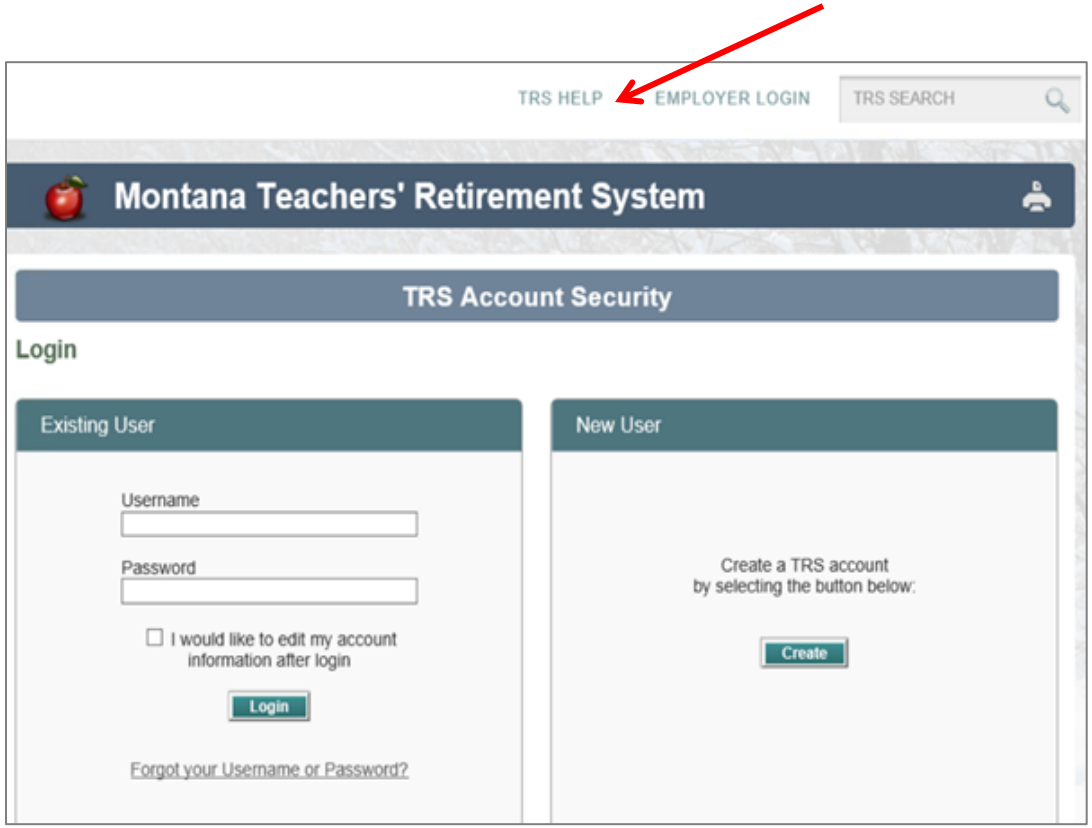
- Open Period
  - You can **update** information in the system through 11:59 p.m. on the 16th of each month.
- Lockout Period
  - You **cannot make any changes** to information in the system between the 17th and 28th of each month.
- View Period
  - You can **view** information and run reports any day of the month.

Login Access: Step 1

1. *Click* on **Employers** on the home page of the TRS website.
   - The link is located on the top of the home page or on the left hand menu.
2. *Scroll* down to the **Employer Reporting to TRS section**
3. *Click* on **Insurance Deduction System** link

Login Access: Step 2

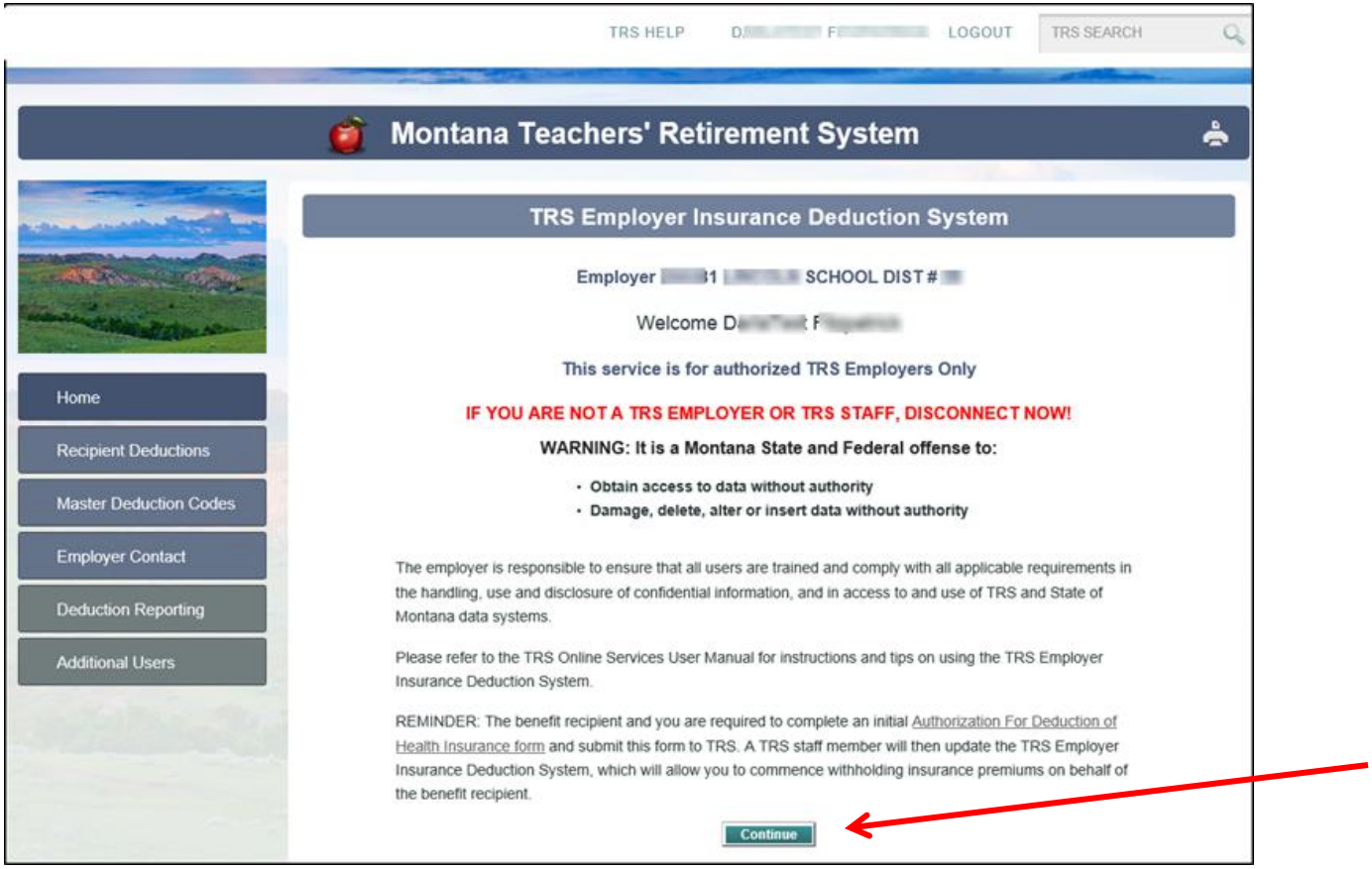
- *Login* with the Username and Password to your new TRS Online Services Account.



- *Click* the **TRS Help** link on the top bar of the TRS Account Security Link for help with:
  - Creating a new account
  - Logging in

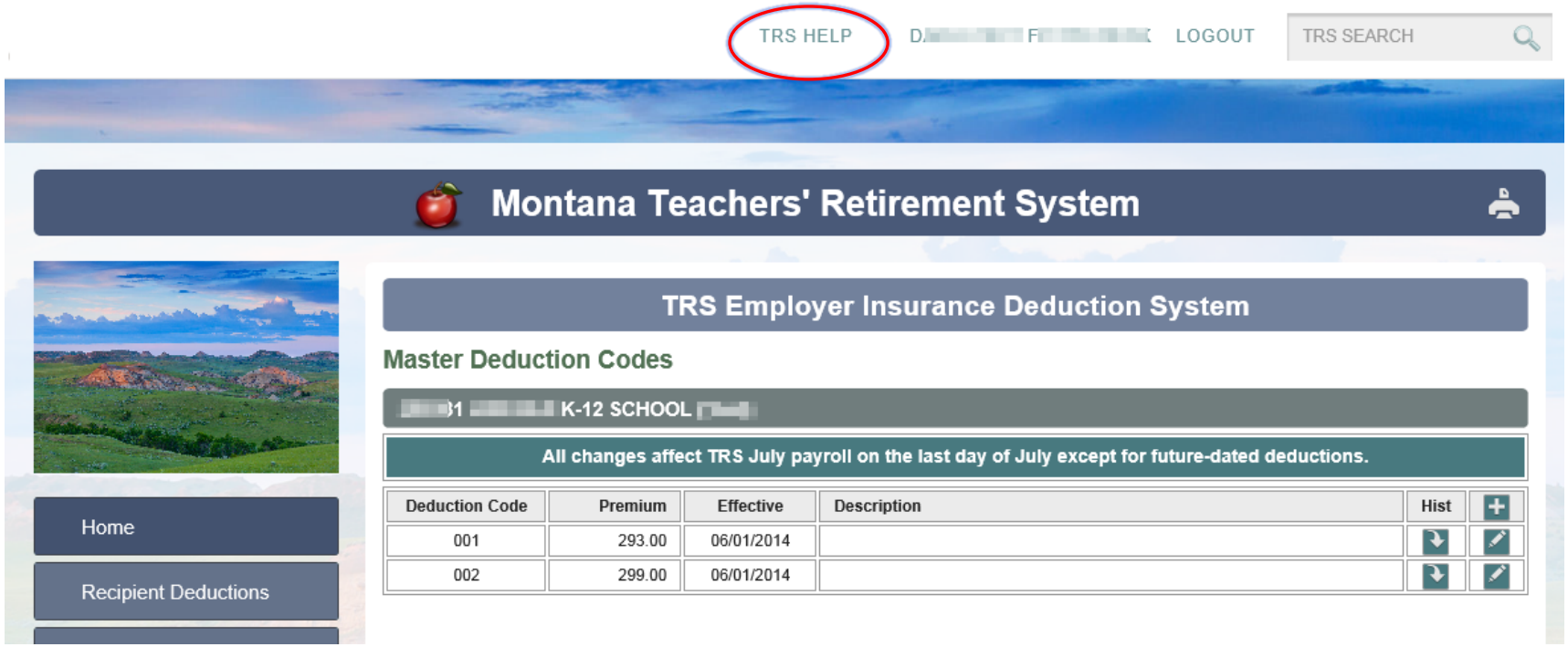
Welcome Screen

- Be sure to *review* the **Welcome Screen**
- *Click* on **Continue** to enter the Insurance Deduction System



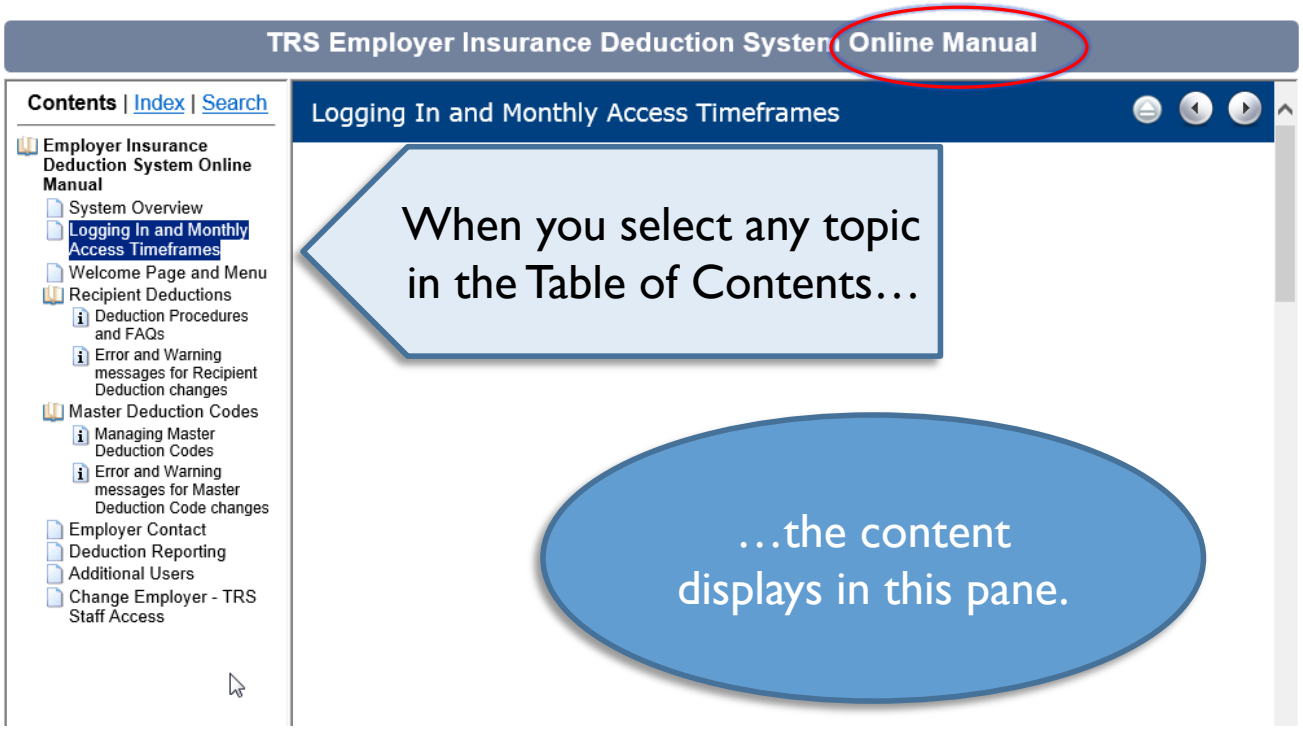
Online Help

- TRS has created a new **Online Manual** for the Insurance Deduction System.
- The manual will walk you, step-by-step, through each aspect of the system.



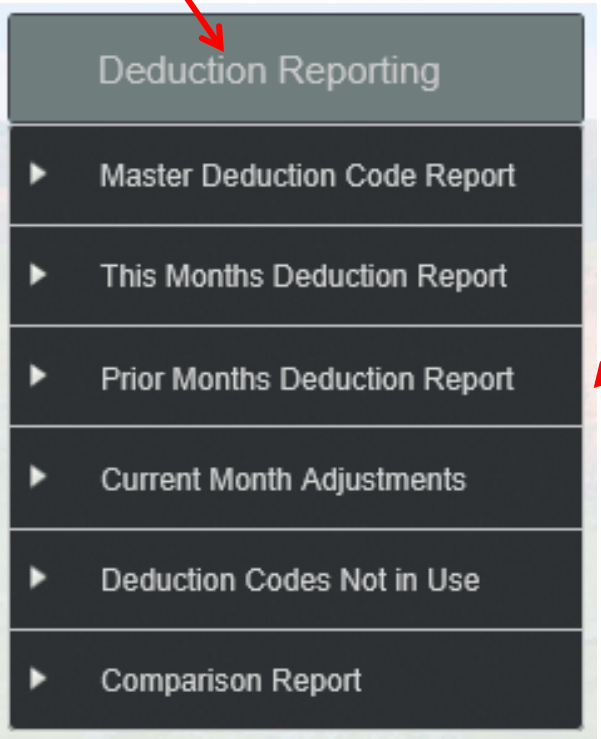
Online Help

- When you *click* on the **TRS Help** link, the Online Manual opens in its own window. You can keep the window open for further reference or you can close it when you have found the information you need.



Deduction Reports

- TRS recommends you *review* your existing data before making any changes.
  - *Click* **Deduction Reporting** in the left hand menu to see a list of report options.

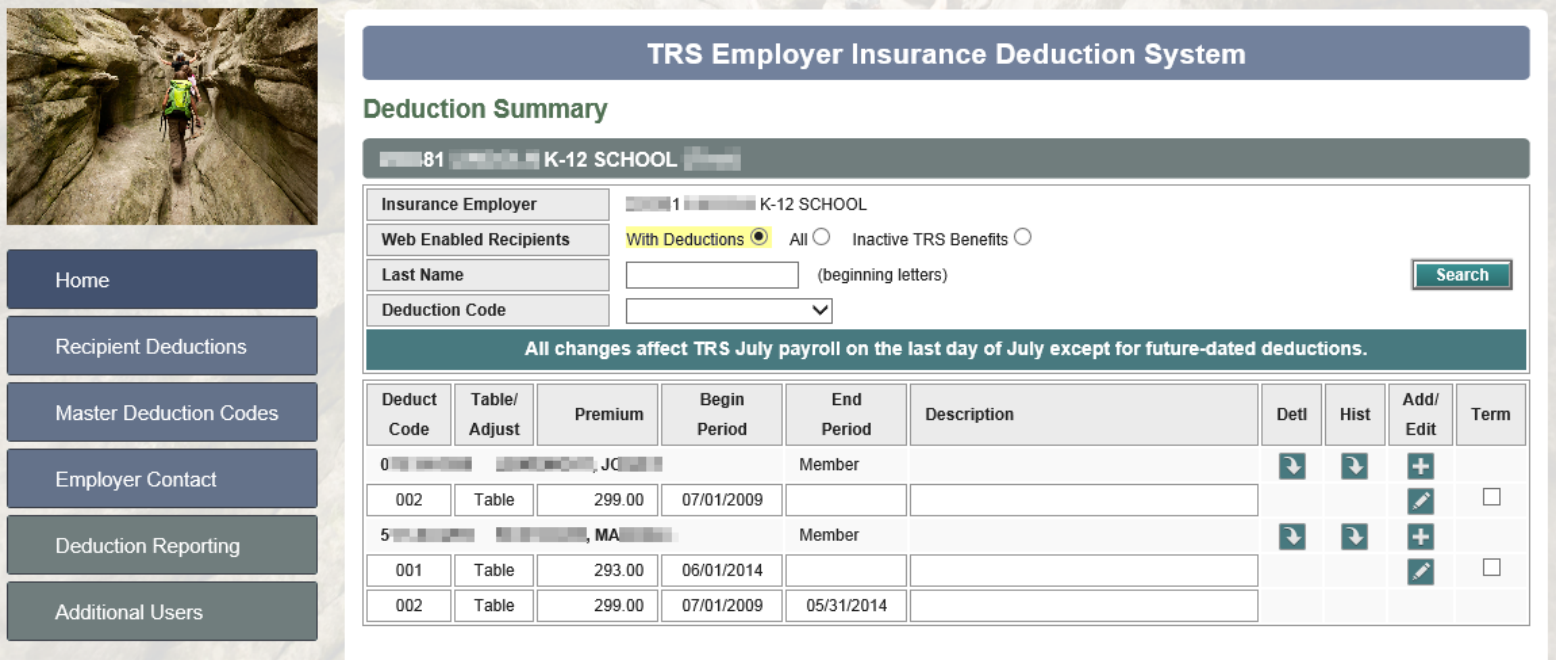


- The Online Manual includes tips for viewing and printing reports.

- You can run as many reports as you need to – as many times as you like.
- Reports are created in PDF.

Updates

- Step-by-step instructions are provided in the Online Manual for updating Master Deduction Codes and Recipient Deductions.



Remember: All changes affecting the current TRS payroll month must be entered on or before 11:59 p.m. on the 16th of the month.

Questions?

- If you have questions that can't be resolved by reviewing the Online Manual, the TRS staff will be happy to help you.
  - (406) 444-3134
  - (866) 600-4045