

MANAGER REFERENCE



LOG IN—WWW.MUSTMT.COM

Enter your assigned Username (email address) | Enter your password | Click on Login button

ADD EMPLOYEE

1. Click on Employees in the Home Page ribbon.
2. Click on Add Employee from menu.
3. Enter employee data—fields marked with * are required.
All alpha characters should be capitalized.

NOTE: For applicable large employers (ALG) use the variable hour ACA structure group to add NBE (non-benefit eligible) employees.

Once all the information is entered, you need to click on one of the buttons at the bottom of the Add Employee wizard:

Done (Employee will have to sign in to select their own benefits).

Add Another Employee—You can add another employee. Employees will have to sign in to select their own benefits

Employee Data—Once you have added your employee's information, you can proceed to select their benefit elections

SEARCH FOR EMPLOYEE

1. Enter valid search criteria in the Search box on the Home Page.
2. Click Enter

Valid Search criteria—

- A few characters of Employee's last name
- Employee's last name, first name
- Employee's full SSN
- Last four of Employee's SSN

MAINTAIN EMPLOYEE RECORD

1. Search for the employee record.
2. Select Edit/Term from the Action drop down menu under the enrollment information box.
3. Select reason for change from the boxes.
4. Enter the change date and click continue.
5. Update the members record appropriately.
6. Last, click Approve.

TERMINATE EMPLOYEE

1. Click on Employees from the Home Page ribbon.
2. Click on Express Termination.
3. Enter the Employee's SSN, termination date (which should be the last day of the month) and select Termination Reason.
4. Click Submit.

PULL AN INVOICE

1. Receive email notification the invoice has been generated.
2. Sign on the MUST Online Market.
3. Click on Administration in the Home Page ribbon.
4. Click on Billing Invoice Document Center from the menu.
5. Expand out the generated invoices under Montana Unified School Trust, the billing period, and your group's name.

6. Select the invoice by clicking on the name.

The export will appear on the bottom left of your screen—double click on this to download the invoice.

7. To print the invoice, save to your system prior to printing. This is a security measure.

RUN A REPORT

1. Click on Reports in the Home Page ribbon.
2. Click on Standard Reports from the menu.
3. Select the Report Type from the drop down menu on the top left.
4. Enter profile name if you want to save the report.
5. Select employees you want to include on your report from the available groups.
6. Enter the appropriate dates.
7. Click on the action you want:
 - Generate Report to just run the report
 - Save Profile to save the report
 - Save and Schedule to save and schedule the report
8. Click on the Dashboard tab to view report requests.
9. To refresh this screen, click on a different tab and then return to the Dashboard. The report will appear on the bottom left of your screen. Double click to download the report.

A FEW AVAILABLE REPORTS

- Submitted Changes—display all approved benefit changes that occurred during the date range you select
- Employee Dependent Census Benefit – displays both employee and dependent census and benefit information





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EMPLOYEE SWITCHING FROM ACTIVE EMPLOYMENT TO RETIREE

If manager is performing the termination or retiree election transaction, they should create a case on the employee's record—

To Upload directly in the system.

1. Click on the Suitcase on the employee record.
2. Click on Employee Case Manager.
3. Click on Create Case.
4. Complete Form:
 - Reason: Eligibility Information
 - Status: Action Needed
 - Assign To: Look for eligibility technician's name in the drop-down box
 - Original Source: Client
 - Description: Active employee switching to retiree coverage—employee wants medical for who; wants dental for who; wants vision for who
 - Select File or Url: click File
 - Choose file: this will open your File Explorer
 - Select your file – this is the proof of retirement if you have it
5. Click Submit.

The eligibility technician should receive the case at the same time the termination/retiree election transaction is pending for their approval.

PASSWORD TIP

This system requires a password reset every 60 days. Even if you remember your password from your last visit during open enrollment, you will be required to change your password.

Please go to "forgot password" to set up your new password.



LOG OUT

LOG OUT

Click on the Log Out link in the top right corner under your name.

- If you are in the middle of a change, the system will ask you if you want to continue the change or abandon the change.

CASE NOTES

To communicate with MUST staff, the manager can create a case note. The manager can also attach documents to the note.

1. Access employee record.
2. Click on the suit case icon.
3. Click on Employee Case Manager.
4. Click on Create a Case.
5. Complete the form:
 - Reason/Disposition: Eligibility > Information
 - Status: Action Needed
 - Assign To: Your eligibility Technician's name from drop down
 - Originating Sources: Client
 - Description: Describe in detail the situation and the action needed
6. Click Submit.

If you are attaching a document to complete:

- Select File or Url: click on FILE
- Choose file: This will open your file explorer
- Select your file
- This is the proof of retirement, proof of loss or form that you want to submit to MUST





BAR CHART FOR MANAGERS

Below is the Benefit Access Rules (BARS) and the appropriate usage Managers have access to. When a specific effective date is required, it is bulleted.

BAR	USAGE
ACA Enrollment	ALG Groups to move a Variable Hour employee from ineligible to eligible.
ACA Ineligible	ALG Groups to move an employee from eligible to Variable Hour employee ineligible.
Birth or Adoption	To add a baby permanently to employee's coverage. <ul style="list-style-type: none"> The date of birth is the effective date.
Change of Beneficiary	To change an employee's life insurance beneficiaries.
Court Ordered Dependent	To add dependents to employee's coverage. <ul style="list-style-type: none"> The date specified on the order is the effective date.
Death of Dependent	To end coverage for a deceased dependent. <ul style="list-style-type: none"> The last day of the month is the effective date.
Death of Employee	To end employment and end coverage for a deceased employee. <ul style="list-style-type: none"> The end of the month is the effective date.
Dependent Child Reaches Maximum Age	To end coverage and offer COBRA for dependents that turn 26 years old. <ul style="list-style-type: none"> The birthdate in current year is the effective date.
Divorce	To end coverage and offer COBRA to spouse. <ul style="list-style-type: none"> The last day of the month of divorce is the effective date. Update spouse address.
Employment Termination	To end an employee's employment/coverages and offer COBRA. <ul style="list-style-type: none"> The last day of the month is the effective date.
Employment Transfer—Loses Eligibility or No Change	Dual Purpose: <ol style="list-style-type: none"> To last day an employee's coverage and offer COBRA for reduction of hours. <ul style="list-style-type: none"> The last day of the month is the effective date. To move employee to another structure group if no change in eligibility. <ul style="list-style-type: none"> The effective date is the 1st of the month.
Employment Transfer Gains	To enroll an employee who becomes eligible due to new position and is now eligible for benefits or more benefits <ul style="list-style-type: none"> The effective date is the 1st day of work in new position.
Gain of Benefits Elsewhere (Dependent Gains Benefits Elsewhere)	To end a dependent's coverage. <ul style="list-style-type: none"> The end of the month is the effective date.
Loss of Benefits Elsewhere (Dependent Loses Coverage Elsewhere)	To enroll a dependent on coverage. <ul style="list-style-type: none"> The effective date is the 1st of the month.
Marriage	To enroll employee and spouse and newly gained dependents due to marriage. <ul style="list-style-type: none"> The effective date is the date of marriage.
New Hire Enrollment	To enroll newly hired employees <ul style="list-style-type: none"> The effective date is the date of hire.



BAR CHART FOR MANAGERS

BAR	USAGE
Rehire Enrollment	To enroll newly rehired employee • The effective date is the new date of hire.
Retiree Election	To switch an employee to retiree status and continue coverage. • The effective date is the 1st day of the retirement month.
Salary Update	To update an employee's salary. • The effective date is the date the salary becomes effective.
Sub Request Drop	To end an employee's or dependents coverage - NOT offering COBRA. • The last day of the month is the effective date.
Update Address	To update an employee's address only. This is the BAR employees have access to.
Update Demographic Information	To update an employee's demographic information.
Update HSA Election	To update an employee's HSA election.

