

GP16: Downloading Retiree Insurance Reports

In this Guided Practice, you will learn how to download reports for retiree insurance.

Exporting retiree deduction data

MyTRS enables employers to download four distinct reports to manage their insurance process and meet their GASB45 and other reporting needs.

To download a report, follow these steps:

- 1) From your home page, click **Insurance Deduction Reports**.

Tuesday, July 29, 2014 | Welcome Robert George | Last Logon 2014-07-29 | Go To: | Account Settings | Logout

MTRS MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM 9005 GOTHAM PUBLIC SCHOOLS
[Change Employer]

Home

Employer Management

- [Employer Information](#)
- [Payroll Calendar](#)
- [Import Deduction Report Files](#)
- [Deduction Reports and Payments](#)
- [EFT Payments](#)

Your Employees

- [Register Employee](#)
- [Notification of Hiring an MTRS Retiree](#)
- [View/Update Employee Information](#)
- [Service and Salary Verification Forms](#)
- [Military LOA Reporting Form](#)
- [Retiree Earnings Limit Calculator](#)

Retiree Insurance

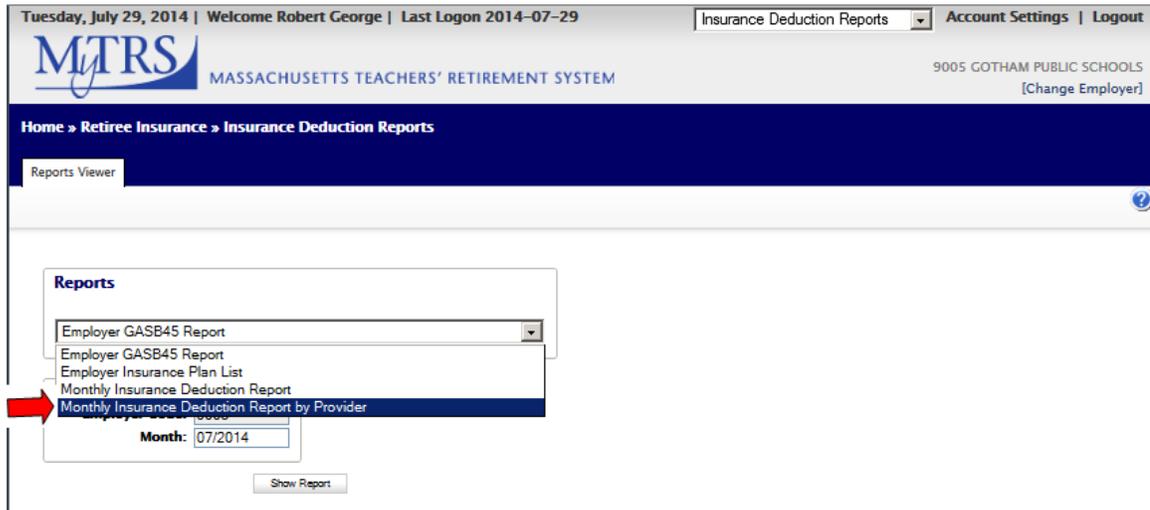
- [Individual Retiree Insurance Selections](#)
- [Retiree Insurance Deduction History](#)
- [Maintain Insurance Premiums](#)
- [Insurance Deduction Reports](#)

Administrative Functions

- [Register for a Training Program](#)
- [Change Your Password and Other Account Settings](#)
- [Update Other Users' Account Settings \(Security Administrator\)](#)

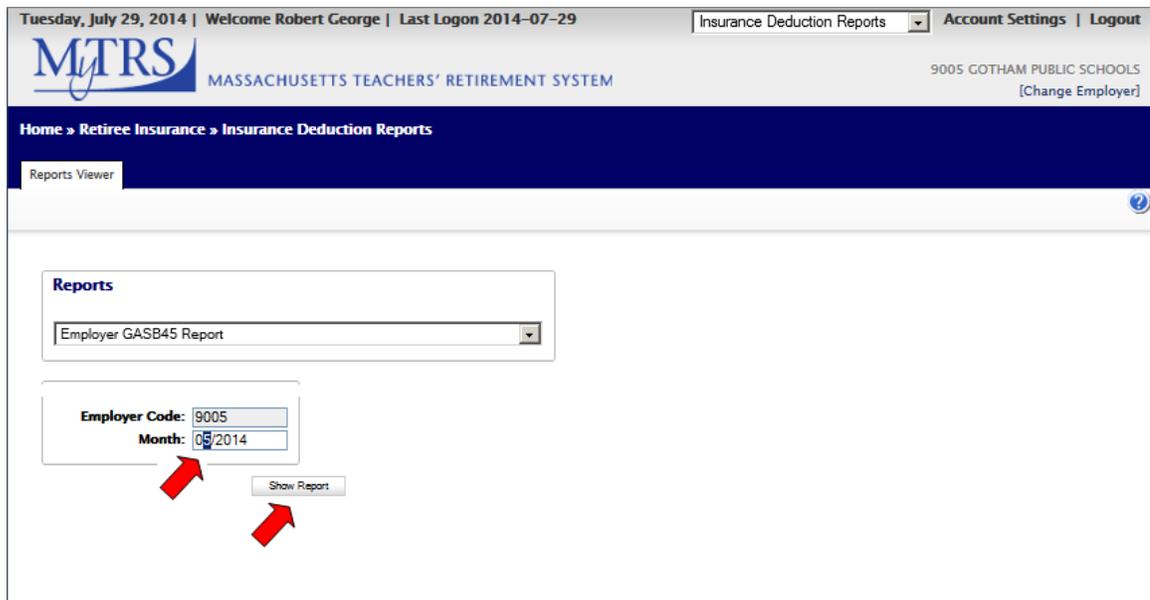
[Site Policy](#) [MTRS Website](#) [Contact Us](#)

- 2) Choose the report you want to export.



The screenshot shows the MTRS website interface. At the top, it displays the date 'Tuesday, July 29, 2014', the user name 'Welcome Robert George', and the last login 'Last Logon 2014-07-29'. There are links for 'Insurance Deduction Reports', 'Account Settings', and 'Logout'. The MTRS logo and 'MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM' are visible, along with the school code '9005 GOTHAM PUBLIC SCHOOLS' and a '[Change Employer]' link. The breadcrumb trail is 'Home > Retiree Insurance > Insurance Deduction Reports'. Below this is a 'Reports Viewer' section. The 'Reports' dropdown menu is open, showing options: 'Employer GASB45 Report', 'Employer GASB45 Report', 'Employer Insurance Plan List', 'Monthly Insurance Deduction Report', and 'Monthly Insurance Deduction Report by Provider'. A red arrow points to the last option. Below the dropdown is a 'Month:' field with '07/2014' and a 'Show Report' button.

- 3) Enter the report month and year and click **Show Report**.



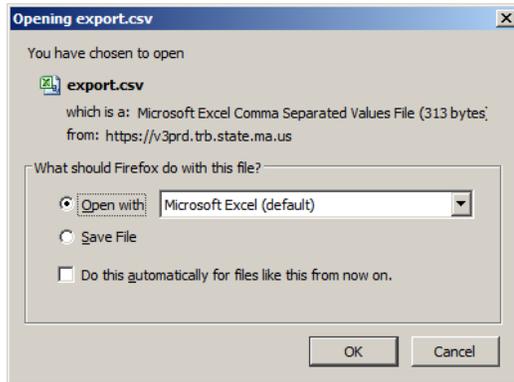
The screenshot shows the MTRS website interface. At the top, it displays the date 'Tuesday, July 29, 2014', the user name 'Welcome Robert George', and the last login 'Last Logon 2014-07-29'. There are links for 'Insurance Deduction Reports', 'Account Settings', and 'Logout'. The MTRS logo and 'MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM' are visible, along with the school code '9005 GOTHAM PUBLIC SCHOOLS' and a '[Change Employer]' link. The breadcrumb trail is 'Home > Retiree Insurance > Insurance Deduction Reports'. Below this is a 'Reports Viewer' section. The 'Reports' dropdown menu is open, showing 'Employer GASB45 Report'. Below the dropdown is a form with 'Employer Code:' and 'Month:' fields. The 'Employer Code' field contains '9005' and the 'Month' field contains '05/2014'. A red arrow points to the 'Employer Code' field, and another red arrow points to the 'Show Report' button.

Note: The report month defaults to the current month. You may need to change this date if this month's retirement warrant hasn't been run, or if you want to access a different month's report.

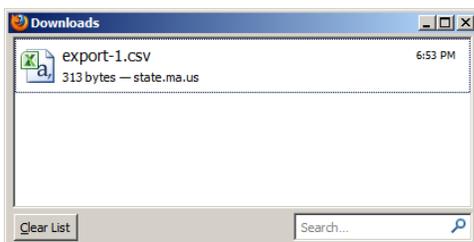
- 5) After clicking **Export**, MyTRS will offer three different export options. We recommend the **Export to CSV** option as it provides the most flexible sorting options.



- 6) Depending on your computer settings, the following window may appear. In this example, the report was opened with Microsoft Excel by clicking Open. MyTRS will also provide the option of saving the file directly to your computer.



The Downloads window below appears when using Firefox. The window stores your export until you hit **Clear List**.



- 7) The report has been exported and is now viewable in Excel. It may also be saved for record-keeping purposes.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Employer GASB45 Report for 05/2014											
2	Generated On: 07/29/2014 05:00:25											
3	Generated By: RGEORGE											
4	Retiree/Si Member #	Benefit Ty	Last Name	First Nam	Email	Attn	Street	City	St	Zip	Ret. Da	
5	XXX-XX-54	149038	Retireme	KOOPA	KATHLEEN	Kathleen@Koop	47 fake str	Byfield	MA	01234-567	#####	
6	XXX-XX-42	169478	Regular R	BEACON	BARBARA	Barbara@Beacon	47 fake str	Stoneham	MA	01234-567	#####	
7	XXX-XX-75	183390	Retireme	AL GHUL	TALIA		47 fake str	West New	MA	01234-567	#####	
8	XXX-XX-10	188945	Regular R	OZ	DOROTHY	Dorothy@Oz.com	47 fake str	Salem	MA	01234-567	#####	
9	XXX-XX-05	204576	Retireme	PENNYWC	ALFRED		47 fake str	Plymouth	MA	01234-567	#####	
10	XXX-XX-34	221113	Regular R	GORDON	JAMES		47 fake str	Plymouth	MA	01234-567	#####	
11	XXX-XX-08	221183	Retireme	ART	ARTY		47 fake str	Peabody	MA	01234-567	#####	
12	XXX-XX-92	236693	Regular R	CLIPP	CLAIRE M.	Claire@Clipp.com	47 fake str	Salem	MA	01234-567	#####	
13	XXX-XX-95	242823	Regular R	NICKEL	NANCY P.	Nancy@Nickel.com	47 fake str	Boston	MA	01234-567	#####	
14	XXX-XX-71	261232	Regular R	DORRANC	BANE		47 fake str	Plymouth	MA	01234-567	#####	
15	XXX-XX-57	264504	Regular R	STAPLER	SUSAN J.	Susan@Stapler.com	47 fake str	Beverly	MA	01234-567	#####	
16	XXX-XX-12	301319	Regular R	WINDOW	WARREN	Warren@Window.cc	47 fake str	East Falm	MA	01234-567	#####	
17	XXX-XX-85	57264	Regular R	FRACTION	FRANCES	Frances@Fraction.cc	47 fake str	Marblehe	MA	01234-567	#####	
18	XXX-XX-95	654605	Regular R	FOX	LUCIUS	mytrsuser5 CHERYL	47 fake str	Manomet	MA	01234-567	#####	
19	XXX-XX-36	91009	Regular R	JOKER	JUDY S.	Judy@Joker.com	47 fake str	BRONX	NY	01234-567	9/1/20	
20	Page 1											
21												
22												
23												
24												
25												
26												
27												
28												

You have completed this Guided Practice.