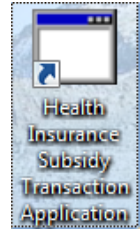


Health Insurance Subsidy Transactions

User Manual

The instructions on this document apply only to the Health Insurance Subsidy Transactions application provided by the Teachers' Retirement Board. The application uses an HTML executable file format (.hta). It is executed like any other executables. The application will access your file system in order to read/write delimited files to a folder specified by you.

After installing the application, open the Health Insurance Subsidy Transactions application by double-clicking on the shortcut on your desktop similar to the one on the right or by double-clicking on the **C:\TRBTS\AP_TS.hta** file. Once the application is opened please follow the **Step by Step** instructions below.



STEP BY STEP INSTRUCTIONS

1) COMPLETE EMPLOYER INFORMATION SCREEN	2
2) VERIFY EMPLOYER INFORMATION.....	3
3) CREATE/OPEN/OVERRIDE A QUARTERLY FILE	4
4) VERIFY THE QUARTERLY FILE	6
5) ADDING/DELETING TRANSACTIONS	7
6) SUBMIT FILE TO TRB.....	8

1) COMPLETE EMPLOYER INFORMATION SCREEN

The **Employer Setup** screen will appear the very first time the application is opened. The Employer Setup information must be completed at this time or whenever there is a change in contact information or you are changing the folder in which your files will reside. Enter all the information below.

Note: Items denoted by an asterisk () are required.*

- a. **Data Folder** – Click on the button to select the folder in which to save your files. *(required)*
- b. **Employer #** - Enter your pre-assigned employer 3-digit number *(required)*. The employer name will appear next to the employer number.
- c. **Contact Name** *(required)*
- d. **Email Address** *(required)*
- e. **Phone#** *(required)*
- f. **Fax#** *(optional)*

The screenshot shows the 'Employer Setup' dialog box with the following fields and values:

Field	Value	Requirement
Data Folder:	U:MY DATA FOLDER	* (required)
School District #:	399 MY DISTRICT	* (required)
Contact Name:	JOHN SMITH	* (required)
Email Address:	JOHN.SMITH@MYDISTRICT.ORG	* (required)
Phone#:	860-999-9999	* (required)
Fax#:	860-555-5555	* (optional)

Buttons: New, Save, Cancel

The **NEW** button will clear all the fields without saving.

The **SAVE** button will save the current information.

The **CANCEL** button will abort all unsaved changes.

Click **SAVE** when done and proceed with **[Step 2]**.

2) VERIFY EMPLOYER INFORMATION

This is your entry screen. Assure that your employer name is displayed as you see in the example below. If your employer name is not displayed click on the Employer Setup link to open the *Employer Setup screen* and repeat **[Step 1]**.

TRB Transaction Sheet

CONNECTICUT
HEALTH INSURANCE BOARD
TIAERS RETIREMENT BOARD

Health Insurance Subsidy Transactions

Employer Setup
Contact Us
AP_TS_191010

MY EMPLOYER (399) NEW OPEN SAVE READY TO UPLOAD

Effective Quarter: _____ Return by: _____
File Name: _____

CHECK IF NO CHANGES

ADD/ DEL TRANSACTION	NAME	SSN#	DOB	<input checked="" type="checkbox"/> DEATH DATE	EFF DATE	MO.	PREMIUM	MEMBER / SPOUSE	MEMBER INFO <small>(Required when the insured is the spouse)</small>	
									NAME	SSN#
+ -	Enter the number of rows to ADD/DELETE									

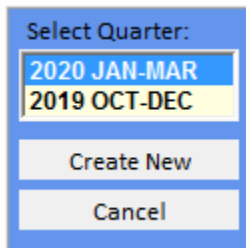
When done proceed with **[Step 3]**.

3) CREATE/OPEN/OVERRIDE A QUARTERLY FILE

To create a new quarter proceed to **[Step 3a]**. To make changes to an existing quarter proceed to **[Step 3b]**. To replace an existing quarter continue to **[Step 3c]**.

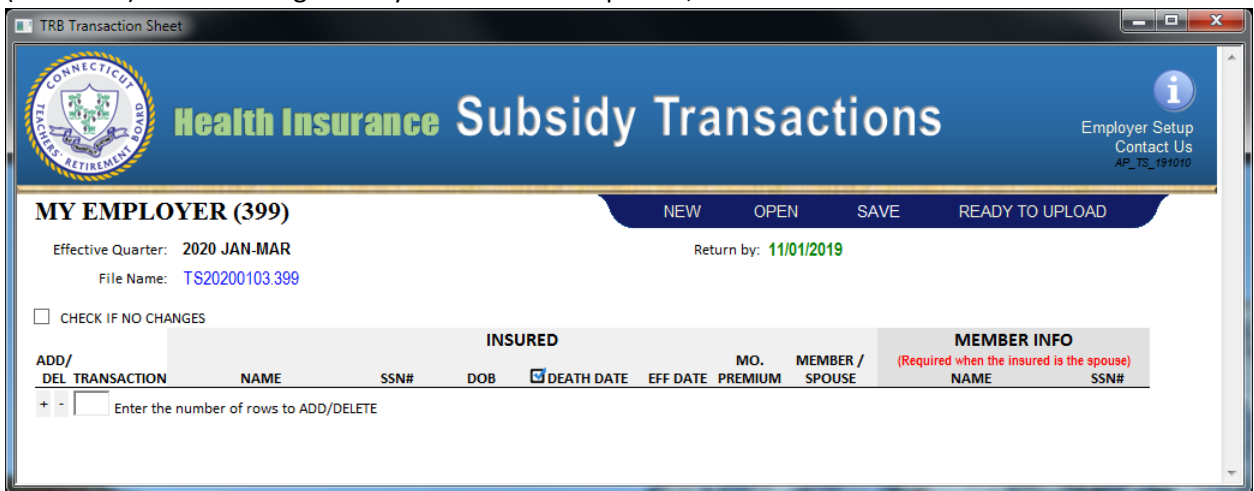
a. Create a new quarterly file

If you are creating a new quarterly file click on **NEW** to select the quarterly file to create. There will be only 2 files as options: the next due quarterly file and the past due quarterly file. The next due quarterly file is selected by default. To start creating the next due quarterly file click on **Create New**. If you have not created nor submitted the past due quarterly file, we recommend that you select the second quarterly file first and click **Create New**. If the quarterly file already exist, you will get a prompted to replace. Click **NO** and proceed with **[Step 3b]** to open the existing file.



In this example, the **2020 JAN-MAR** is the next due quarterly file. The **2019 OCT-DEC** is the past due quarterly file.

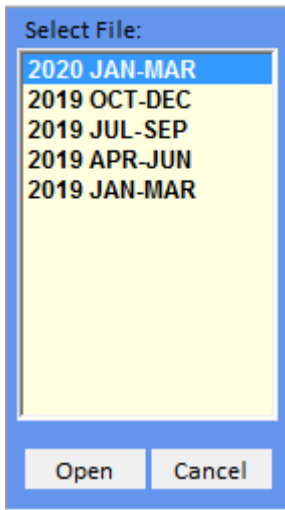
(EXAMPLE) After creating a newly 2020 JAN-MAR quarter, the screen should look as follow:



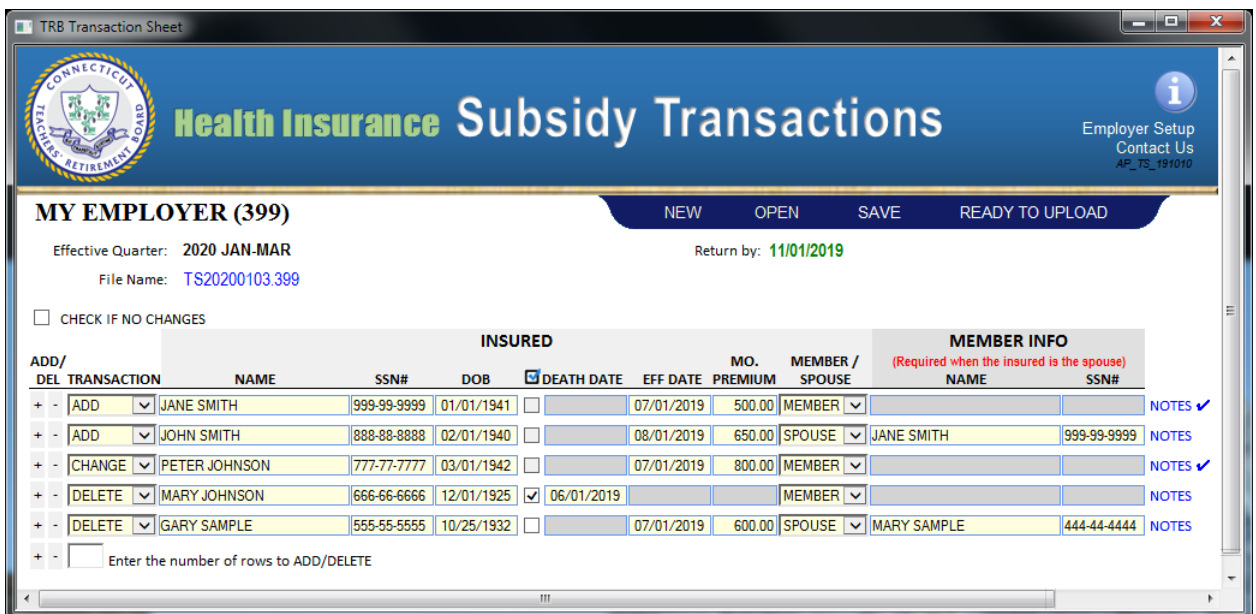
Proceed with **[Step 4]**.

b. Open an existing quarterly file

If you are opening a previously created quarterly file click on **OPEN**. Quarterly files are listed in date order with the most recent first. If the quarterly file is not listed go to **[Step 3a]** and create a new quarterly file. Otherwise, select the quarterly file from the list and click **Open**.



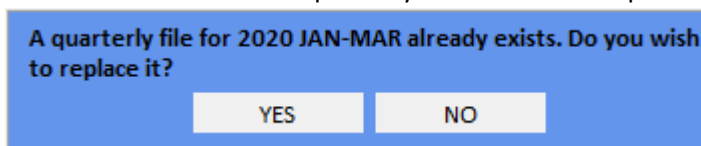
(EXAMPLE) After opening a previously created 2020 JAN-MAR quarter with 5 transactions, the screen should look as follow:



Proceed with **[Step 4]**.

c. Replace an existing quarterly file

Quarterly files cannot be deleted but can be replaced. To replace an existing quarterly file just follow the instructions to create a new file in **[Step 3a]**. When prompted to replace the quarterly file with a new one click **YES**. You can only replace a quarterly file when *Return by:* has a **DATE** or **PAST DUE**. **ARCHIVED** quarterly files cannot be replaced.



Proceed with **[Step 4]**.

4) VERIFY THE QUARTERLY FILE

Once the quarterly file has been created or opened verify that the *Effective Date*, *Return by*, and *File Name* are all correct and not blank. **DO NOT ENTER ANY TRANSACTIONS** until this information is correct. **In doing so, the quarterly file will not be created nor be able to be saved.** Repeat [Step 3] if this information is incorrect.

- **Effective Quarter:** This is the quarter you have selected to enter transactions.
- **Return by:** This will indicate one of the following 3 types of status:
 - 1) **[DATE]** A date indicates when the next file is due
 - 2) **[PAST DUE]** Indicates that the file has passed the due date regardless if the file was submitted or not. **If this PAST DUE file has not been submitted, you will not receive a check until the file is received by TRB.** If your file was already submitted, you can ignore the PAST DUE message.
 - 3) **[ARCHIVED]** Indicates that file cannot be changed nor submitted. You will only be able to view and use it for historical purposes only.
- **File Name:** This is the file name that reflects the quarter which you have selected to enter transactions. This is the file that you will upload to the secured FTP server when completed.

TRB Transaction Sheet

CONNECTICUT
HEALTH INSURANCE
RETIREMENT

Health Insurance Subsidy Transactions

Employer Setup
Contact Us
AP_TS_191010

MY EMPLOYER (399) NEW OPEN SAVE READY TO UPLOAD

Effective Quarter: 2020 JAN-MAR Return by: 11/01/2019

File Name: TS20200103.399

CHECK IF NO CHANGES

ADD/DEL TRANSACTION		INSURED				MEMBER / SPOUSE		MEMBER INFO <small>(Required when the insured is the spouse)</small>	
NAME	SSN#	DOB	DEATH DATE	EFF DATE	MO. PREMIUM	MEMBER / SPOUSE	NAME	SSN#	

+ - Enter the number of rows to ADD/DELETE

Please know, moving the cursor over most items on the screen will display two types of pointers with information about item:

- A **hand pointer** indicates the item is clickable and provides some functionality. These are the clickable items:
 - *Employer Setup* – Opens the Employer Setup information screen
 - *Contact Us* – Displays contact information
 - *File Name* – Opens the folder in which the quarterly file resides.
 - *New* – Prompts to create a new quarter
 - *Open* – Opens an existing quarterly file.
 - *Saves* – Saves the current quarterly file.
 - *Ready to Upload* – Opens the Secure State Web Client page
- A **help pointer** only displays information about the item.

Proceed with [Step 5].

5) ADDING/DELETING TRANSACTIONS

If there are no subsidy changes to submit for this quarter check the **CHECK IF NO CHANGES** checkbox. Click on **SAVE** and when prompted click on **SAVE** again. You are ready to submit this quarterly file with no changes. Proceed with **[Step 6]**.

If you have transactions to submit continue below. **Please note, subsidies that were already added on previous quarters do not need to be entered again unless premiums has changed or subsidies are being removed.**

The **[+]** and **[-]** buttons will add or delete a number of blank rows specified by the *Enter the number of rows to ADD/DELETE* box. If a number is not specified, only 1 row will be added or deleted at the current position. A row can be added or deleted at any position on the list.

DO NOT ENTER COMMAS ON ANY FIELD.

a. To enter a new transaction add a row.

Enter the following information under the **INSURED** section: (required and missing information will be denoted by '???').

- **TRANSACTION** – Select the transaction type: ADD, CHANGE, or DELETE.
- **NAME** – Name of the insured person
- **SSN#** – The insured's social security number
- **DOB** – The insured's date of birth
- **Death Date checkbox** – Check this box if the insured is deceased. (By default, this checkbox is grayed out. It is enabled when the selected transaction is DELETE.)
- **DEATH DATE** – Enter the insured's date of death. (It is required when the Death Date checkbox is checked.)
- **EFF DATE** – The effective date for the transaction. (If the insured is deceased, the effective date is not required and therefore, it is grayed out).
- **MO. PREMIUM** – The total monthly premium amount. **Do not enter the subsidy amount.** (If the insured is deceased, the monthly premium is not required and therefore, it is grayed out).
- **MEMBER/SPOUSE** – Indicate if the insured is the member or the member's spouse. If you have indicated a MEMBER, skip the MEMBER NAME and MEMBER SSN# fields. Otherwise, continue the **MEMBER INFO** section. (By default, MEMBER INFO section is grayed out.)
- **NAME** – The member's name related to the insured (Required only if you have indicated that the insured is the member's spouse).
- **SSN#** – The member's social security number related to the insured (Required only if you have indicated that the insured is the member's spouse).
- **NOTES** – Click on the **NOTES** link to add any comments you may have regarding the current transaction. You will get a popup screen. Add any comment and when done click out of the popup screen. A check mark next to the NOTES link indicates that there is a comment for the transaction.

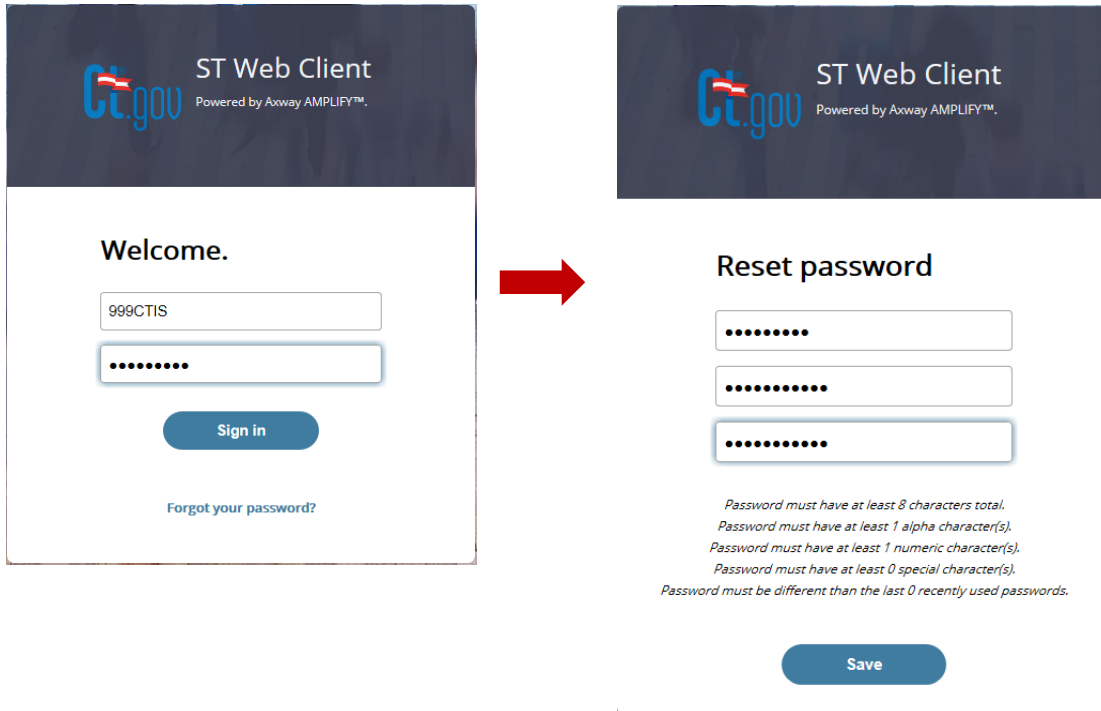
b. To remove an existing transaction click on the **[-]** button on the selected row.

c. When done adding, changing, or deleting transactions click on **SAVE**. When prompted click **SAVE** again. You are ready to submit the quarterly file. Proceed with **[Step 6]**.

6) SUBMIT FILE TO TRB

All subsidy quarterly transaction files must be submitted to TRB via the secured **ST Web Client FTP server**. To submit your file to TRB click on **READY TO UPLOAD** from the menu bar or click on <https://sft.ct.gov> . This will open the **ST Web Client FTP** webpage. If you are logging in for the first time continue with **[Step 6a]**. If you have previously logged-in successful login again and continue with **[Step 6b]**.

- a. Enter the *User ID* and a temporary *password* provided to you by TRB. You will be prompted to reset your password. Click **Save** when done.



The image displays two sequential screenshots of the ST Web Client interface, connected by a red arrow pointing from left to right.

Left Screenshot (Welcome screen):

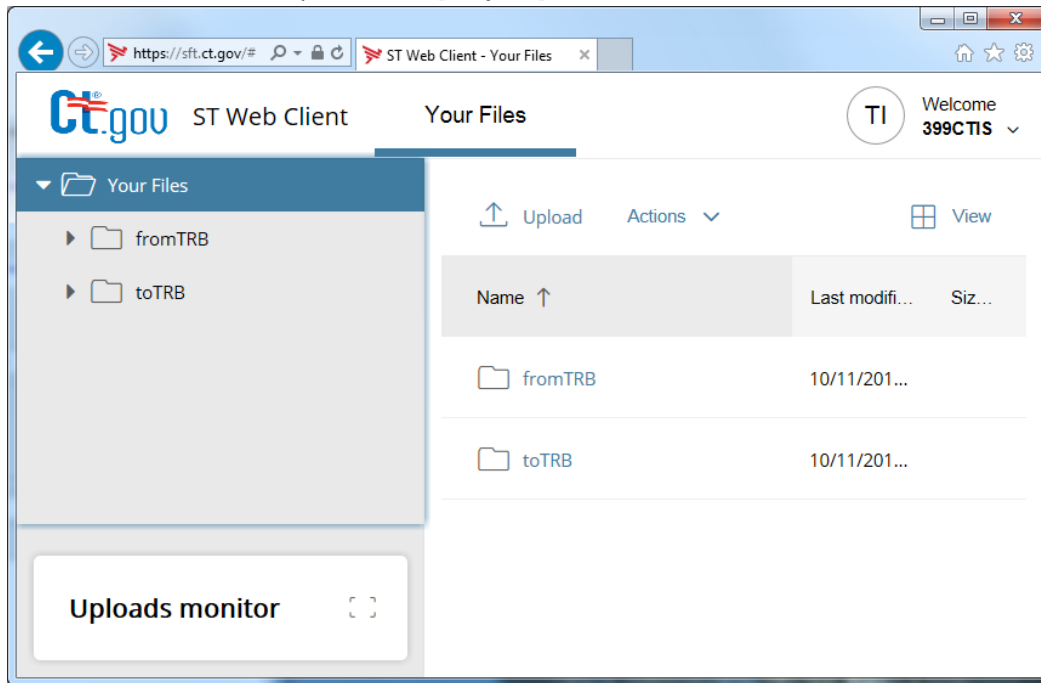
- Header: ST Web Client, Powered by Axway AMPLIFY™.
- Text: Welcome.
- Input fields: A text field containing "999CTIS" and a password field with masked characters.
- Button: "Sign in" (blue).
- Link: "Forgot your password?"

Right Screenshot (Reset password screen):

- Header: ST Web Client, Powered by Axway AMPLIFY™.
- Text: Reset password
- Input fields: Three password fields, each with masked characters.
- Text: Password must have at least 8 characters total.
Password must have at least 1 alpha character(s).
Password must have at least 1 numeric character(s).
Password must have at least 0 special character(s).
Password must be different than the last 0 recently used passwords.
- Button: "Save" (blue).

Continue with **[Step 6b]**.

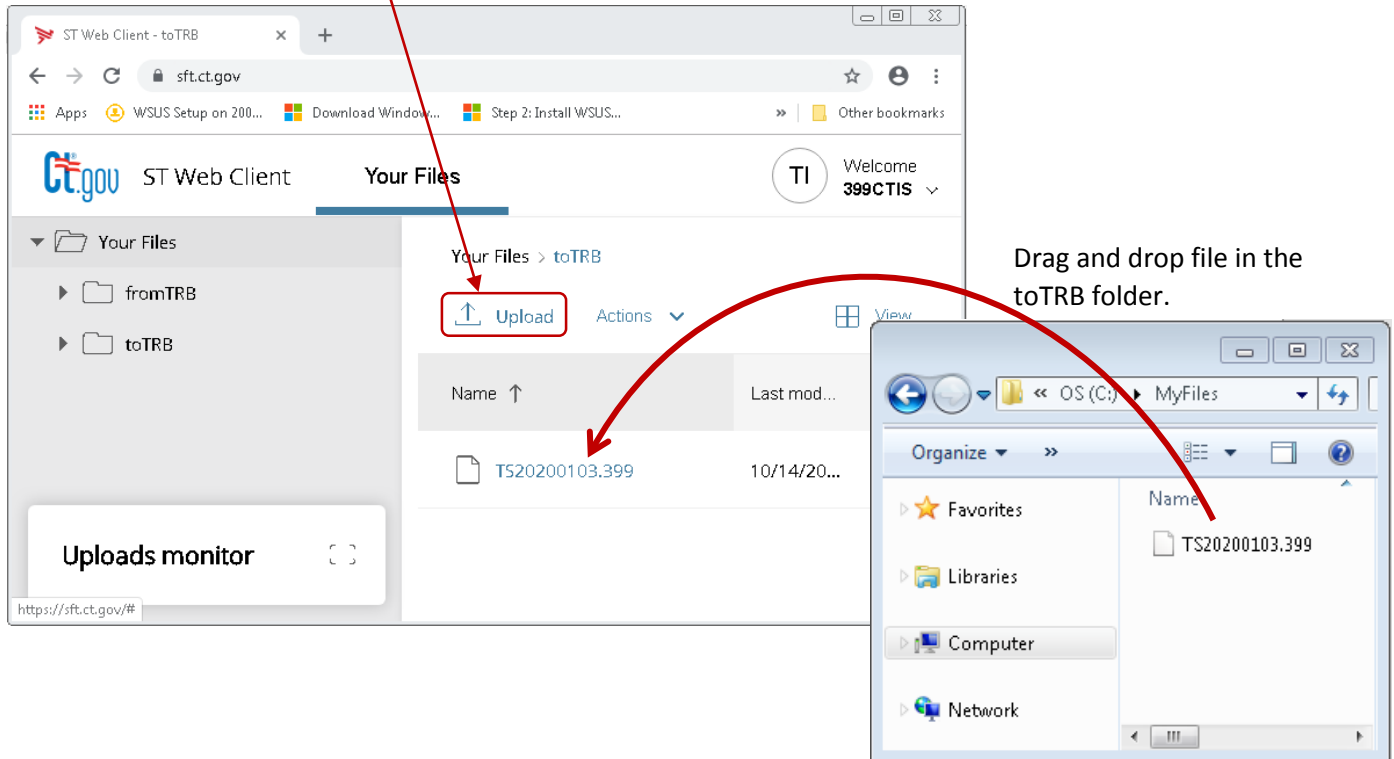
- b. Once you are logged in, you will see two folders for your employer, **fromTRB** and **toTRB**. To download subsidy transaction reports from TRB proceed to **[Step 6c]**. To upload your subsidy transactions files to TRB proceed to **[Step 6d]**.



- c. Click on the **fromTRB** folder to receive quarterly subsidy reports from TRB. The subsidy transaction reports will be available at the end of every quarter. You will be notified by email when these reports are ready. **Please note, these reports will be purged after 30 days.** To download the report click on the report and follow the browser's prompts/instructions.

d. Click on the **toTRB** folder to upload and submit your quarterly subsidy transaction file. We recommend that you download and review the quarterly subsidy report before uploading your quarterly subsidy transaction file. The file can be uploaded using two different methods:

- Click on **Upload** – When clicking on Upload, you will be prompted to *Choose a File to Upload*. Locate your file and click **Open**. (If you cannot locate your file, click on **Employer Setup** to get folder name.)
- **Drag-and-Drop** – Locate your file on your file system and drag-and-drop it in the folder as the example below shows.



You are done!