



GEORGIA DEPARTMENT  
OF COMMUNITY HEALTH

# STATE HEALTH BENEFIT PLAN

## Employer Automated System Interface for Retirement (EASI-R)



**Presented to:** Retirement Systems & Contract Employers offering  
Retiree Coverage

**Presented by:** Member Services, SHBP Eligibility & Benefits Administration  
Unit

**Published:** Thursday, November 12, 2020



## Mission:

The mission of the Department of Community Health is to provide access to affordable, quality health care to Georgians through effective planning, purchasing, and oversight.

# Purpose

The SHBP Employer Automated System Interface for Retirement, also known as “EASI-R,” is a new automated system for our Manual Retirement Systems , i.e., Retirement systems currently using the Indicative Data Management (IDM) function of the SHBP Enrollment Portal to manually submit retiree data. EASI-R will:

- Improve the turnaround time for retiree eligibility updates, especially for New Retirees; and
- Provide Retirement Systems the ability to submit retiree data directly to the SHBP Enrollment Portal via an Automated Update File (AUF), which is the same process for our larger State Retirement Systems, ERS and TRS, submitting retiree records via an automated file.

In this presentation, Manual Retirement Systems will be guided step-by-step through the process of submitting retiree data using EASI-R.



# Agenda

- Accessing EASI-R
- Basic Information Page
- Record Type(s)
- Selecting Record Type(s)
- Removing Record Type(s)
- Submitting Records
- Example Record Type(s)
- Retiree Record Submission/Update Timeframes
- Confirming Retiree Record Update(s)
- EASI-R Access
- EASI-R Questions

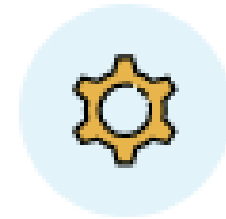


# Accessing EASI-R

The SHBP Employer Automated System Interface for Retirement Systems (EASI-R) will be accessible by visiting the Employer's section of the SHBP website at

<https://shbp.georgia.gov/employers>, then Your Employing Entity section, under *Other Employer Resources*.

This link will be available on or before November 2 and you will be notified via email.



Other  
Employer  
Resources



# Accessing EASI-R (continued)



## EASI-R SIGN IN

User name

Password

Remember me?

Sign in

[Request Access](#) if you don't have an account.



GEORGIA DEPARTMENT  
OF COMMUNITY HEALTH

The EASI-R sign-in page will display two fields for you to enter your:

- Username
- Password

Usernames and Passwords are assigned by SHBP Member Services. Due to security requirements, Contractors cannot access EASI-R. Sharing passwords will result in permanent termination of your access to EASI-R.

After your EASI-R Access is approved:

- Your **Username** will be the email address you provide when completing the EASI-R Access Form.

The actual page may appear slightly different from the above.

# Accessing EASI-R (continued)



## EASI-R SIGN IN

User name

Password

Remember me?

Sign in

[Request Access](#) if you don't have an account.

- Your **Password** will be system generated. If you forget your Password, you will be able to request a password reset on the EASI-R sign-in page.
- The system will send a temporary password and reset link to the email address provided on the EASI-R Access Form.



GEORGIA DEPARTMENT  
OF COMMUNITY HEALTH

The actual page may appear slightly different from the above.

# Basic Information Page

After you log in to EASI-R, the Basic Information page will display. The Basic Information page contains three fields:

1. Contact Name,
2. Email, and
3. Payroll Location Number



Employer Automated System Interface for Retirement (EASI-R)

BASIC INFORMATION

Contact Name\*

Email\*

Payroll Location\*

Previous

Next

Submit

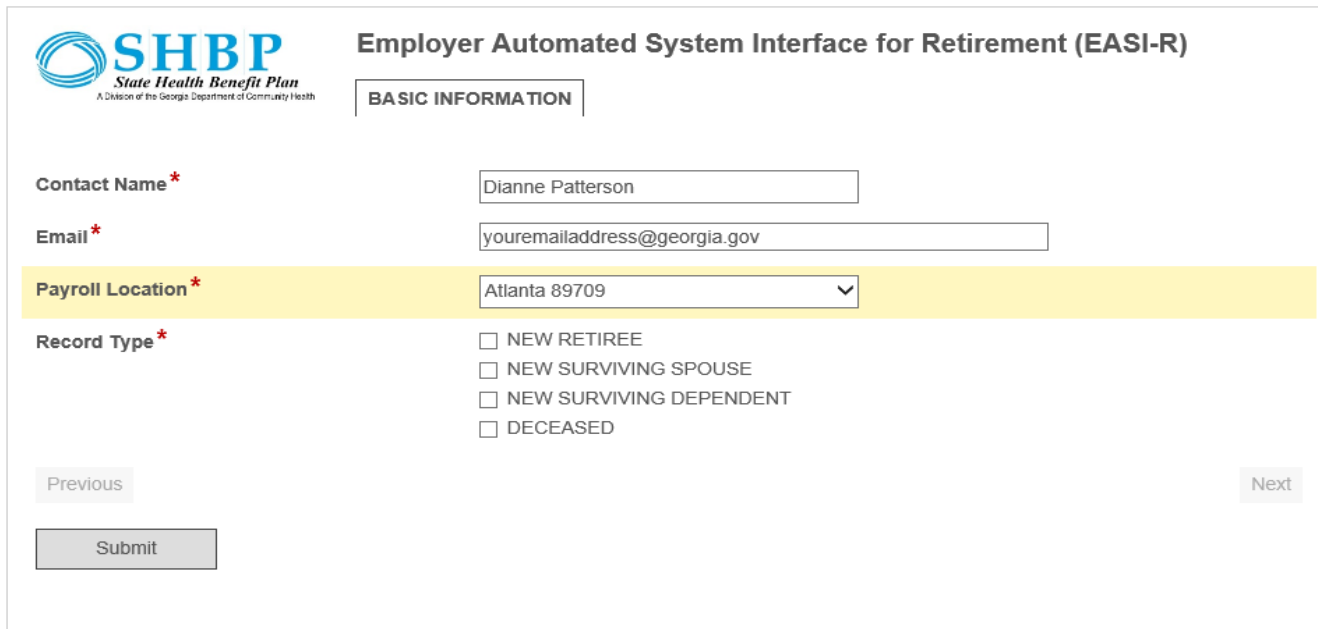


GEORGIA DEPARTMENT  
OF COMMUNITY HEALTH



# Basic Information Page (continued)

1. Enter your first and last name in the **Contact Name Field** and your email address in the **Email Field**.
2. Select the **Payroll Location Number** applicable to the Retiree(s) you are adding or updating in that Payroll Location. Note: If you have more than one Payroll Location, please check to make sure you have chosen the correct Payroll Location Number applicable to the Retiree(s).



The screenshot shows the SHBP (State Health Benefit Plan) Employer Automated System Interface for Retirement (EASI-R) Basic Information page. The page includes the SHBP logo, the title "Employer Automated System Interface for Retirement (EASI-R)", and a "BASIC INFORMATION" tab. The form fields are: "Contact Name\*" with the value "Dianne Patterson"; "Email\*" with the value "youremailaddress@georgia.gov"; "Payroll Location\*" with a dropdown menu showing "Atlanta 89709"; and "Record Type\*" with four radio button options: "NEW RETIREE", "NEW SURVIVING SPOUSE", "NEW SURVIVING DEPENDENT", and "DECEASED". Navigation buttons for "Previous", "Next", and "Submit" are also visible.

**SHBP**  
State Health Benefit Plan  
A Division of the Georgia Department of Community Health

Employer Automated System Interface for Retirement (EASI-R)

BASIC INFORMATION

Contact Name\*

Email\*

Payroll Location\*

Record Type\*

- NEW RETIREE
- NEW SURVIVING SPOUSE
- NEW SURVIVING DEPENDENT
- DECEASED

Previous  Next



# Basic Information Page (continued)



## Employer Automated System Interface for Retirement (EASI-R)

BASIC INFORMATION

NEW RETIREE

DECEASED

Contact Name \*

Dianne Patterson

Email \*

youremailaddress@georgia.gov

Payroll Location \*

Atlanta 89709

Record Type \*

- NEW RETIREE
- NEW SURVIVING SPOUSE
- NEW SURVIVING DEPENDENT
- DECEASED

Previous

Next

3. The **Record Type Field** will automatically display. This field is in a check box format. You will have the option to select multiple record types for different retirees. This means you can transmit multiple retiree records, such as a New Retiree Record for Jane Doe and a Deceased Record for John Doe as long as the retirees entered are in the same Payroll Location you previously selected.



GEORGIA DEPARTMENT  
OF COMMUNITY HEALTH

# Record Types

**There are four (4) Retiree Record Types:**

1. ENRT = New Retiree
2. DCSD = Deceased Retiree
3. ENSS = New Surviving Spouse
4. ENSD = New Surviving Dependent

The chart on the next page provides guidance on which Retiree Record Type should be chosen based on the Retiree's eligibility status.



# Record Types

<b>EASI-R Record Type</b>	<b>Retiree Eligibility Status</b>	<b>Instructions</b>
<b>ENRT</b>	<b>New Retiree</b>	Select this record type when submitting a newly retired Active member transitioning to Retirement status.
<b>ENSS</b>	<b>New Surviving Spouse</b>	Select this record type when submitting SHBP coverage for a Surviving Spouse of a deceased Retiree if they are receiving an annuity.
<b>ENSD</b>	<b>New Surviving Dependent</b>	Select this record type when submitting SHBP coverage for a Surviving Dependent Child of a deceased Retiree if they are receiving an annuity.
<b>DCSD</b>	<b>Deceased Retiree</b>	Select this record type when submitting a Deceased Retiree, Deceased Surviving Spouse or Deceased Dependent Child.



# Selecting Record Types

1. To select a Retiree Record Type, **click the check box in front of the Record Type.** Multiple Record Types may be selected. For each Record Type selected, a

corresponding tab will display on the EASI-R Navigation Bar located across the top of the Interface.

A Retiree Record *must be submitted* for each Record Type you have chosen as shown on the corresponding tab. To remove a Record Type that you no longer wish to use or mistakenly selected, uncheck the box in front of the Record Type in the Record Type field. The tab will no longer be displayed in the Navigation Bar.



## Employer Automated System Interface for Retirement (EASI-R)

BASIC INFORMATION NEW RETIREE DECEASED

Contact Name \*

Dianne Patterson

Email \*

youremailaddress@georgia.gov

Payroll Location \*

Atlanta 89709

Record Type \*

- NEW RETIREE
- NEW SURVIVING SPOUSE
- NEW SURVIVING DEPENDENT
- DECEASED

Previous

Next



GEORGIA DEPARTMENT  
OF COMMUNITY HEALTH

# Selecting Record Types (continued)

- Click the **Next** button at the bottom of the interface to display the selected Record Type(s) to begin inputting Retiree eligibility data OR select the Record Type Tab you would like to navigate to.



## Employer Automated System Interface for Retirement (EASI-R)

BASIC INFORMATION

NEW RETIREE

DECEASED

Contact Name \*

Dianne Patterson

Email \*

youremailaddress@georgia.gov

Payroll Location \*

Atlanta 89709

Record Type \*

- NEW RETIREE
- NEW SURVIVING SPOUSE
- NEW SURVIVING DEPENDENT
- DECEASED

Previous

Next



GEORGIA DEPARTMENT  
OF COMMUNITY HEALTH

# Removing Record Types

To Remove a Record Type(s) from the EASI-R Navigation Bar, you must:

1. Click the **Previous** button at the bottom of the screen.

After selecting the **Previous** button at the bottom of the interface, you will navigate back to the previous page, which will display all the Retiree Record Type(s) you previously selected or you can select the Retiree Record Type tab from the display across the top of the interface.



## Employer Automated System Interface for Retirement (EASI-R)

BASIC INFORMATION | **NEW RETIREE** | NEW SURVIVING SPOUSE  
NEW SURVIVING DEPENDENT | DECEASED

Contact Name\*   
Email\*   
Payroll Location\*

New Retiree

Record Type   
Retiree SSN\* (?)   
First Name\*  Middle Name  Last Name\*   
Sex\*  Male  Female  
Date of Birth\*   
Phone Number   
Email   
Street Address 1\*   
Street Address 2   
City\*  State\*  Zip\*   
County of Residence\*   
Country\*

Employment / Benefits

SHBP Eligible\*  Yes  No  
Retirement Date\*   
Years of Service\*   
Retirement System\*   
5 Years of Service as of 1/1/2012?\*

[Add Another Record](#)

[Previous](#)



[Next](#)

# Removing Record Types (continued)

The screenshot displays the SHBP Employer Automated System Interface for Retirement (EASI-R). The interface includes the SHBP logo (State Health Benefit Plan, A Division of the Georgia Department of Community Health) and a title bar with tabs for 'BASIC INFORMATION', 'NEW RETIREE', 'NEW SURVIVING SPOUSE', 'NEW SURVIVING DEPENDENT', and 'DECEASED'. The 'NEW RETIREE' tab is active. Below the tabs are input fields for 'Contact Name' (Dianne Patterson), 'Email' (dpatterson@dch.ga.gov), and 'Payroll Location' (Atlanta 89700). A yellow highlighted section titled 'Record Type\*' contains four checked checkboxes: 'NEW RETIREE', 'NEW SURVIVING SPOUSE', 'NEW SURVIVING DEPENDENT', and 'DECEASED'. Navigation buttons for 'Previous' and 'Next' are located at the bottom of the form.

**Contact Name\***

**Email\***

**Payroll Location\***

**Record Type\***

- NEW RETIREE
- NEW SURVIVING SPOUSE
- NEW SURVIVING DEPENDENT
- DECEASED

Screenshot above displays all the Retiree Record Type(s) you previously selected.





# Removing Record Types (continued)

1. **Uncheck the Record Type(s)** you no longer need. Here you can see we have unchecked 2 of the Record Types – New Surviving Spouse and New Surviving Dependent.
2. Then click Next at the bottom of the screen to continue.



## Employer Automated System Interface for Retirement (EASI-R)

BASIC INFORMATION NEW RETIREE DECEASED

Contact Name \*

Dianne Patterson

Email \*

youremailaddress@georgia.gov

Payroll Location \*

Atlanta 89709

Record Type \*

- NEW RETIREE
- NEW SURVIVING SPOUSE
- NEW SURVIVING DEPENDENT
- DECEASED

Previous

Next



GEORGIA DEPARTMENT  
OF COMMUNITY HEALTH

# Removing Record Types (continued)

After selecting **Next**, the interface will redisplay with the previously selected Record Type(s) on the Navigation Bar minus the ones you've removed.



## Employer Automated System Interface for Retirement (EASI-R)

BASIC INFORMATION NEW RETIREE DECEASED ←

Contact Name\*

Email\*

Payroll Location\*

---

New Retiree

Record Type

Retiree SSN\* (?) (numbers only e.g. 001020003)

First Name\*  Middle Name  Last Name\*

Sex\*  Male  Female

Date of Birth\*

*Here, we have chosen the ENRT and DCSD Record Types. This means we are transmitting a:*

1. New Retiree Record, and
2. Deceased Retiree or Survivor record.



# Submitting Records

Now that you have chosen all the Retiree Record Types, it's time to submit the records. To submit, you must:

1. Complete all required fields marked with red asterisks (\*) for the selected Record Type(s). *The Record Type example displayed is a DCSD record (i.e., Deceased Record).*

**SHBP**  
State Health Benefit Plan  
A Division of the Georgia Department of Community Health

**Employer Automated System Interface for Retirement (EASI-R)**

BASIC INFORMATION | NEW RETIREE | **DECEASED**

Contact Name \*

Email \*

Payroll Location \*

Deceased

Record Type \*

Employee SSN \* (?)   
(numbers only e.g. 001020003)

First Name \*  Middle Name  Last Name \*

Sex \*  Male  Female

Date of Birth \*

Date of Death \*

Phone Number   
(numbers only including area code e.g. 7067771122)

Email

Street Address 1 \*

Street Address 2   
(e.g., Apt./Bldg./Ste. #)

City \*  State \*  Zip \*

County of Residence \*

Country \*

Employment / Benefits

SHBP Eligible \*  Yes  No

Retirement Date \*

Years of Service \*

Retirement System \*

5 Years of Service as of 1/1/2012? \*

[Add Another Record](#)

Next



# Submitting Records (continued)

SHBP Eligible\*  Yes  No

Retirement Date\* (Please enter the first day of the month of retirement)  
 

Years of Service\*

Retirement System\*  ▼

5 Years of Service as of 1/1/2012?\*  ▼

[Add Another Record](#)

Previous


Next

For example, in the screenshot, you can see the option to **Add Another Record button** to display additional fields *below* the first DCSD record to enter another DCSD Record for the next retiree.

To submit multiple Retiree records for additional retirees requiring the same Record Type, click the Add Another Record button to display additional fields to enter your next retiree.



# Submitting Records (continued)

 **State Health Benefit Plan**  
A Division of the Georgia Department of Community Health

**BASIC INFORMATION** | **NEW RETIREE** | **DECEASED**

Contact Name \*

Email \*

Payroll Location \*

New Retiree

Record Type

Retiree SSN \* (?)  SSN Validations  
First three digits must not be greater than 772  
First three digits must not be equal to 666  
First three digits must not be equal to 000  
Digits 4 and 5 must not equal 00  
Last four digits must not equal 0000  
Must not match any of these:  
123456789  
111111111  
333333333  
222222222  
444444444  
555555555  
777777777

First Name \*   Last Name \*

Sex \*

Date of Birth \*

Phone Number  For ITIN's we allow the following ranges to also load:  
900-70-0000 through 999-88-9999  
900-94-0000 through 999-99-9999

Email

Street Address 1 \*

The question mark (?) displayed next to the “Retiree SSN” field on each Record Type page provides helpful information about the parameters for the SSN formats allowed in the SHBP Enrollment Portal.



# Submitting Records (continued)

Deceased

Record Type\* DCSD x

Employee SSN\* (?)  
(numbers only e.g. 001020003)  
Value is required.

First Name\* Middle Name\* Last Name\*

Sex\*  Male  Female

**Date of Birth\***

Date of Death\*

Phone Number

Email

Street Address 1\*

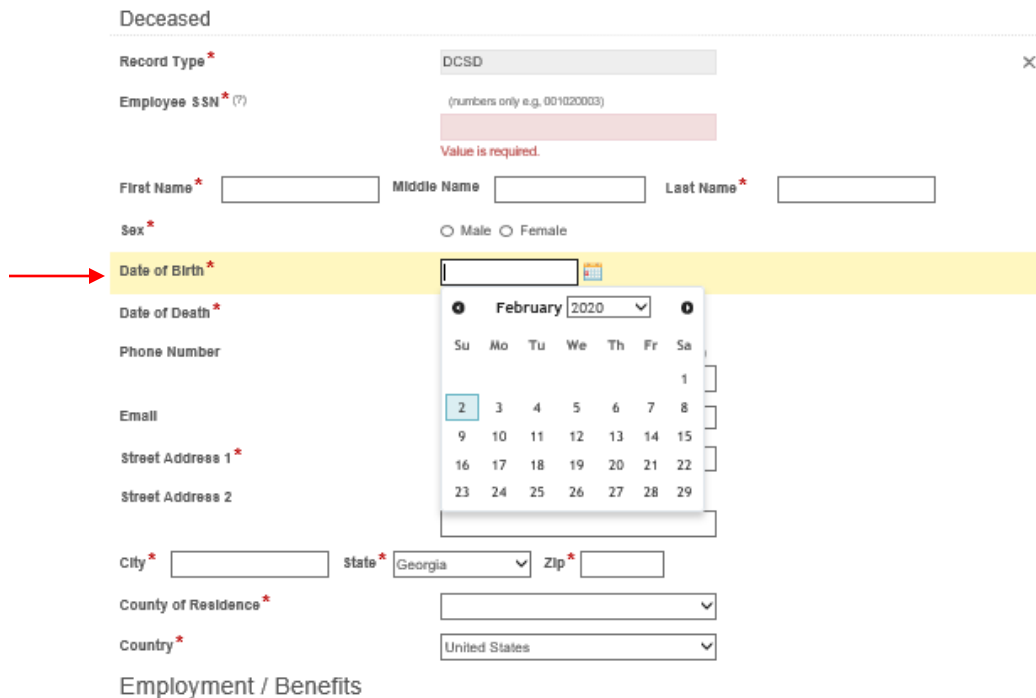
Street Address 2

City\* State\* Georgia Zip\*

County of Residence\*

Country\* United States

Employment / Benefits



For the Date of Birth field, you may enter the date by clicking on the calendar icon on the right side of the field or by manually entering the date.

Note: Dates must be entered as MMDDCCYY (e.g 10251945= October 25, 1945)



# Submitting Records (continued)

- Once all data has been entered for the displayed Record Type tab on the EASI-R Navigation bar, if you have additional Record Types to submit for other retirees, **click the next applicable Record Type on the EASI-R Navigation Bar.**

The current Record Type page will close and display as greyed out (no longer available for data entry unless you navigate back to that Record Type).

The new Record Type page will display and you should complete all required fields.



GEORGIA DEPARTMENT  
OF COMMUNITY HEALTH



## Employer Automated System Interface for Retirement (EASI-R)

BASIC INFORMATION NEW RETIREE DECEASED

Contact Name *	<input type="text" value="Dianne Patterson"/>		
Email *	<input type="text" value="youremailaddress@georgia.gov"/>		
Payroll Location *	<input type="text" value="Atlanta 89709"/>		
New Retiree			
Record Type	<input type="text" value="ENRT"/>		
Retiree SSN* (?)	<input type="text" value=""/>		
	<small>(numbers only e.g. 001020003)</small>		
First Name *	<input type="text"/>	Middle Name	<input type="text"/>
		Last Name *	<input type="text"/>
Sex *	<input type="radio"/> Male <input type="radio"/> Female		
Date of Birth *	<input type="text"/>		

Here, the Deceased Record Type is greyed out and the New Retiree Record Type is displayed.

# Submitting Records (continued)

Street Address 1\*

Street Address 2

City\* State\* Georgia Zip\*

County of Residence\*

Country\* United States

**Employment / Benefits**

SHIP Eligible\*  Yes  No

Retirement Date\*

Years of Service\*

Retirement System\*

5 Years of Service as of 1/1/2012\*

[Add Another Record](#)

Previous

Next

Submit



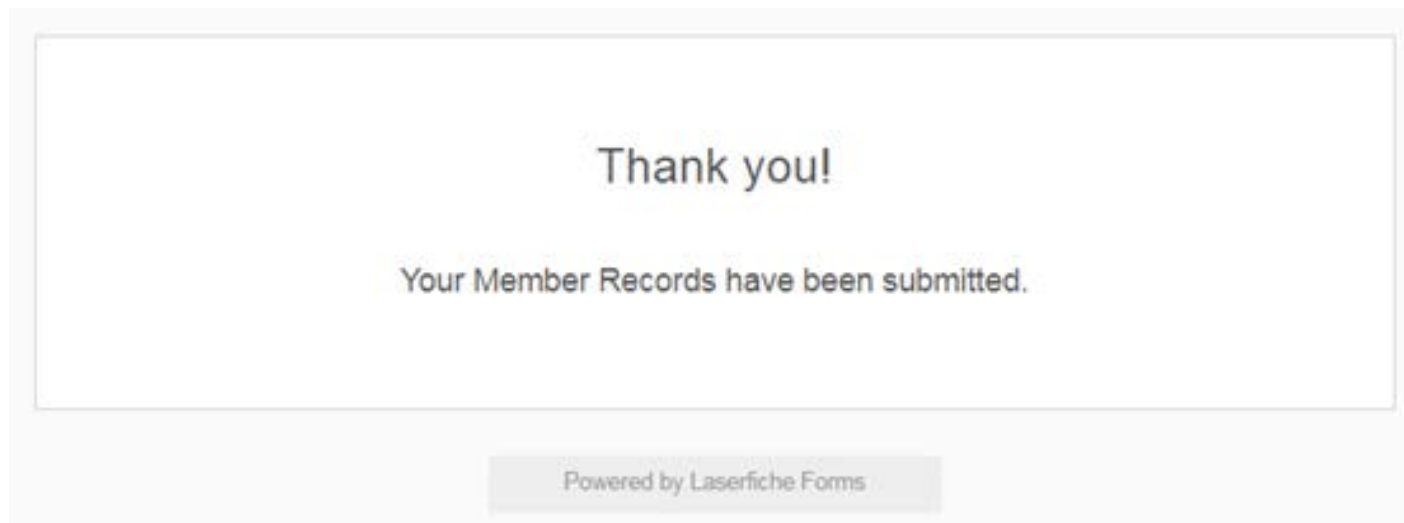
- Once all selected Record Types tabs displayed on the EASI-R navigation Bar have been completed with required Retiree data, **click the Submit button to transmit your records to the SHBP Enrollment Portal.**





# Submitting Records (continued)

A confirmation screen will display informing you that the record(s) have been submitted.



# Example: ENRT Record Type

## New Retiree



### Employer Automated System Interface for Retirement (EASI-R)

BASIC INFORMATION NEW RETIREE

Contact Name\*

Email\*

Payroll Location\*

#### New Retiree

Record Type

Retiree SSN\* (?)   
(numbers only e.g. 001020003)

First Name\*  Middle Name  Last Name\*

Sex\*  Male  Female

Date of Birth\*

Phone Number   
(numbers only including area code e.g.7067771122)

Email

Street Address 1\*

Street Address 2   
(e.g., Apt./Bldg./Ste. #)

City\*  State\*  Zip\*

County of Residence\*

Country\*

#### Employment / Benefits

SHBP Eligible\*  Yes  No

Retirement Date\*   
(Please enter the first day of the month of retirement)

Years of Service\*

Retirement System\*

5 Years of Service as of 1/1/2012?\*

[Add Another Record](#)



# Example: ENSS Record Type

## New Surviving Spouse



### Employer Automated System Interface for Retirement (EASI-R)

BASIC INFORMATION NEW SURVIVING SPOUSE



Contact Name\*

Email\*

Payroll Location\*

#### New Surviving Spouse

Record Type

Retiree (Surviving Spouse) SSN\* (?) (numbers only e.g. 00102003)

First Name\*  Middle Name  Last Name\*

Sex\*  Male  Female

Date of Birth\*

Phone Number (numbers only including area code e.g. 7067771122)

Email

Street Address 1\*

Street Address 2 (e.g., Apt./Bldg./Ste. #)

City\*  State\*  Zip\*

County of Residence\*

Country\*

Employment / Benefits

SHBP Eligible\*  Yes  No

Retiree (Deceased) SSN\* (?) (numbers only e.g. 00102003)

Retirement Date\*

Years of Service\*

Retirement System\*

5 Years of Service as of 1/1/2012?\*

[Add Another Record](#)



# Example: ENSD Record Type

## New Surviving Dependent Child



### Employer Automated System Interface for Retirement (EASI-R)

BASIC INFORMATION NEW SURVIVING DEPENDENT ←

Contact Name\*

Email\*

Payroll Location\*

#### New Surviving Dependent

Record Type

Retiree (Surviving Dependent) SSN\* (?) (numbers only e.g. 001020003)

First Name\*  Middle Name  Last Name\*

Sex\*  Male  Female

Date of Birth\*

Phone Number (numbers only including area code e.g. 7067771122)

Email

Street Address 1\*

Street Address 2 (e.g., Apt./Bldg./Ste. #)

City\*  State\*  Zip\*

County of Residence\*

Country\*

Employment / Benefits

SHBP Eligible\*  Yes  No

Retiree (Deceased) SSN\* (?) (numbers only e.g. 001020003)

Retirement Date\*

Years of Service\*

Retirement System\*

5 Years of Service as of 1/1/2012?\*

[Add Another Record](#)



# Example: DCSD Record Type

Deceased



## Employer Automated System Interface for Retirement (EASI-R)

BASIC INFORMATION DECEASED



Contact Name\*   
Email\*   
Payroll Location\*

### Deceased

Record Type\*   
Employee SSN\* (?)   
First Name\*  Middle Name  Last Name\*   
Sex\*  Male  Female  
Date of Birth\*   
Date of Death\*   
Phone Number   
Email   
Street Address 1\*   
Street Address 2   
City\*  State\*  Zip\*   
County of Residence\*   
Country\*

### Employment / Benefits

SHBP Eligible\*  Yes  No  
Retirement Date\*   
Years of Service\*   
Retirement System\*   
5 Years of Service as of 1/1/2012?\*

[Add Another Record](#)



# Retiree Record Submission & Update Timeframes

Retirement Entity Submits EASI-R AUF Record	EASI-R AUF Record Updated in SHBP Enrollment Portal
Monday by 4:30 p.m.	Tuesday at 8:00 a.m.
Monday after 4:30 p.m.	Wednesday at 8:00 a.m.
Tuesday by 4:30 p.m.	Wednesday at 8:00 a.m.
Tuesday after 4:30 p.m.	Thursday at 8:00 a.m.
Wednesday by 4:30 p.m.	Thursday at 8:00 a.m.
Wednesday after 4:30 p.m.	Friday at 8:00 a.m.
Thursday by 4:30 p.m.	Friday at 8:00 a.m.
Thursday after 4:30 p.m.	Monday at 8:00 a.m.
Friday after 4:30 p.m.	Monday at 8:00 a.m.
Friday by 4:30 p.m.	Tuesday at 8:00 a.m.

## EASI-R AUF Records submitted:

- Monday – Friday *by 4:30 p.m.* will be processed that evening and updated in the SHBP Enrollment Portal by 8:00 a.m. the next business day.
- Monday – Friday *after 4:30 p.m.* will be processed the next business day and updated in the SHBP Enrollment Portal the second business day.



# Confirming Retiree Record Updates

## How Do you Know if the Retiree Record Was Updated?

Always, check the:

- 1) SHBP Enrollment Portal the next business day or second business day, as applicable, after the record is loaded to see if a Retiree's record has been updated, and
- 2) State Health Repository Tool (SHRT) for Proof Bills to see any resulting billing changes, if any.



# Confirming Retiree Record Updates (continued)

## What if the Retiree's Record is Not Updated When You Check the SHBP Enrollment Portal?

1. Check to see if the Retiree Record included a **Future Dated** event. For example, if today is October 29th and you send a New Retiree Record with a November 1st Retirement Date, the Record will not load until November 1st, and you should check the SHBP Enrollment Portal the next business day after the Future Date you entered (i.e., November 1st). If the Record still has not loaded, see #2 below.
2. Check to see if the Retiree Record **Errored Out** or was **Rejected**.
  - A. When Retirement Systems transmit retiree eligibility records via EASI-R that Error Out or are Rejected, the Retirement System receives either an Input Error Report or Reject Report uploaded to its State Health Repository Tool (SHRT) folder(s) in the applicable Payroll Location folder for that Retiree.
  - B. These Reports are in SHRT in a Retirement System's "From\_ADP" folder for each of its Payroll Locations, as applicable, and housed in the "Input\_Errors" subfolder.





# EASI-R Access

For security reasons, all users must complete an EASI-R Access Agreement that will be located in the Employer's section of the SHBP website at <https://shbp.georgia.gov/employers>, then Your Employing Entity section, under *Other Employer Resources*. This link will be available on or before **November 2, 2020** and you will be notified via email.

Beginning **November 2, 2020**, we will begin distributing USER IDs and Passwords.

## **IMPORTANT**

- If you currently have access to EASI, please note EASI and EASI-R are two separate systems. Both require a different login and password.
- EASI-R is designated strictly for entry of Retiree eligibility data.
- For security purposes, EASI-R access will be deleted, if you fail to access it each quarter or every 3 months.



# Questions?

**You are now Automated!** This means you are sending SHBP AUF files for your retirees and manual reporting is no longer needed.

Questions regarding EASI-R may be submitted via:

- The SHBP (X)change: <https://shbp.georgia.gov/xchange>, or
- By contacting your dedicated Retiree Specialist





# Purpose:

Shaping the future of A Healthy Georgia by improving access and ensuring quality to strengthen the communities we serve.