



# Retiree Benefits

Tina Peterson (San Dieguito) and Anthony Rodgers (SDCOE EBS)



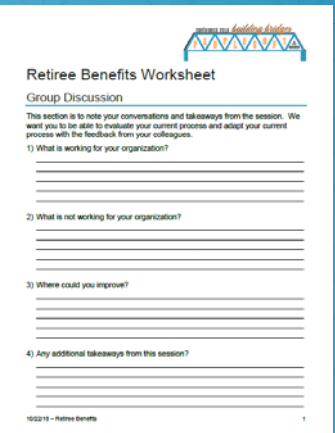
peoplesoft user's conference 2018 | 10-22-18 | *building bridges* 

## Session Topics

- Welcome & Introductions (5 min)
- Discussion/Activity (25 min)
  - Retiree Benefits Workflow
  - What is your administrative process? How can it be improved?
- Retiree Benefits Processing Reminders (10 min)
- "Hot" topics (5 min)
- Open Forum / Questions / Information Sharing (10 min)
- Wrap up & Closing (5 min)

# Discussion/Activity

Retiree Benefits Workflow  
What is your administrative process? How can it be improved?



**Retiree Benefits Worksheet**

**Group Discussion**

This section is to note your conversations and takeaways from the session. We want you to be able to evaluate your current process and adapt your current process with the feedback from your colleagues.

1) What is working for your organization?  
\_\_\_\_\_  
\_\_\_\_\_

2) What is not working for your organization?  
\_\_\_\_\_  
\_\_\_\_\_

3) Where could you improve?  
\_\_\_\_\_  
\_\_\_\_\_

4) Any additional takeaways from this session?  
\_\_\_\_\_  
\_\_\_\_\_

10/22/18 - Retiree Benefits 1

3

peoplesoft user's conference 2018 | 10-22-18 | *building bridges*

## Retiree Benefits Administrative Process

- Retiree Benefits Workflow?
- What is your administrative process?
- How can it be improved?

HR	<ul style="list-style-type: none"> <li>Notifies Benefits that an employee is retiring and approved to retire with benefits</li> </ul>
BA and/or PY	<ul style="list-style-type: none"> <li>Prepares an employee to be assigned Retiree Benefits</li> </ul>
HR	<ul style="list-style-type: none"> <li>Creates a Retiree position</li> <li>Sets up the Department Budget Table</li> <li>Applies the Retiree position to Job Data</li> <li>Updates Benefit system in Job Data for the secondary job(s)</li> </ul>
BA	<ul style="list-style-type: none"> <li>Moves the Retiree into a Retiree Benefit Program</li> <li>Assess what benefits need to be changed and/or terminated</li> <li>Enrolls in Retiree Benefits and terminates non-eligible benefits</li> <li>Verified Retirement enrollments</li> </ul>
PY	<ul style="list-style-type: none"> <li>Inputs an Additional Pay to trigger benefits to process during on-cycle Payroll processing</li> </ul>

SESSION A - Retiree Benefits
4

# Retiree Benefits Processing Reminders

5

peoplesoft user's conference 2018 | 10-22-18 | *building bridges* 

## Retiree Benefits Processing Reminders

### Important reminders regarding retiree benefit processing and error avoidance:

1. Process pay, benefit adjustments(employee benefits) and vacation payouts prior to setting up and processing retiree benefits
2. Communicate / process benefit terminations
  - 403b
  - Group Term Life Insurance
3. Create retiree position with effective date prior to retirement date
4. Ensure all steps are completed
  - Create additional pay
5. Void "on-demand" event items pending
6. Retiree Benefit Program effective date must be on or before the Retiree Benefits Deduction begin date

SESSION A - Retiree Benefits

6

## “Hot” Topics

### Known items currently in process of development / research.

- Summer months
  - Override screen issues (Payroll)
  - Timing is critical. Benefit Sync process will remove overrides if term rows are added in a pay-period in which benefits should not process.
- Suspense items
  - Retirees working in a secondary position

## Open Forum / Questions / Information Sharing



# Session Notes

---

These slides and session notes are published on the CRC Website.  
<http://crc.sdcoe.net/peoplesoftconference>