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?

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2) What is not working for your organization?

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3) Where could you improve?

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4) Any additional takeaways from this session?

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Sample Workflow

This worksheet was created to stimulate conversation and communication within your organization around the Retiree Benefits administrative process.

Sample Workflow

To set up an individual employee for Retiree Benefits, the process requires action by multiple disciplines. This outline is just one example of how the workflow may be processed within your organization.

HR	• Notifies Benefits that an employee is retiring and approved to retire with benefits
BA and/or PY	• Prepares an employee to be assigned Retiree Benefits
HR	• Creates a Retiree position • Sets up the Department Budget Table • Applies the Retiree position to Job Data • Updates Benefit system in Job Data for the secondary job(s)
BA	• Moves the Retiree into a Retiree Benefit Program • Assess what benefits need to be changed and/or terminated • Enrolls in Retiree Benefits and terminates non-eligible benefits • Verified Retirement enrollments
PY	• Inputs an Additional Pay to trigger benefits to process during on-cycle Payroll processing

For additional copies of this guide, please go to http://crc.sdcoe.net/resources/peoplesoft/guides.

Retiree Benefits Work Sheet

To set up an individual employee for Retiree Benefits, you need to complete Parts A through O. This cheat sheet lists each task and the screen navigations. The color coding by HR, BA, and PY is just one example of how the workflow may be processed within your organization.

NOTE: Once an employee has retired, moving forward he or she should only have hourly positions.

	Task HR BA PY	**Person(s) Responsible**
A	**Prepare the employee to be assigned to Retiree Benefits.** Close all open events in the On-Demand Event Maintenance screen. Do not enter any more events on the BAS Activity table. All Empl Records must be assessed for open events. **Part A: Prepare Employee to be Assigned Retiree Benefits** Main Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance **Remove Non-Worker's Comp General Deductions** Main Menu > Payroll for North America > Employee Pay Data USA >Deductions > Create General Deductions **Remove Additional Pay** Main Menu > Payroll for North America > Employee Pay Data USA >Create Additional Pay	
B	**Create the Retiree position using Job Code 188888 (Certificated) or 288888 (Classified).** Note that you will select Salary Admin Plan 9999, Grade 999, and Step 1 when you set up the position. Make sure the Effective Date precedes the retirement date of the incumbent that will be retired into this position. **Part B: Create the Retiree Position** Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info	
C	**Set up the Department Budget Table (DBT)**. For Retirees, the primary DBT tab is the Deductions tab. **Part C: Set Up the Department Budget Table (DBT) for Retirement with Benefits Positions** Main Menu > Set up HCM > Product Related > Commitment Accounting > Budget Information > Department Budget Table USA	
D	**Retire the employee by terminating the existing position and adding a new employment instance for the newly created retiree position.** **Part D. Terminate Employee and Assign the Retiree Position on Job Data** - **Terminate the Employee** Main Menu > Workforce Administration > Job Information > Job Data - **Create the Employment Instance to Assign the Retiree Position** Navigate to Main Menu > Workforce Administration > Job Information > Add Employment Instance - **Move the Retiree from Active Retiree Status to Terminated Retiree Status** Main Menu > Workforce Administration > Job Information > Job Data	
E	**Apply the Base Benefits System to all Secondary jobs.** Now that you have applied the Retiree Position to the primary job, you now need to update the Benefit System for all the employees Employee Records that are listed as Secondary. This applies to active, inactive and terminated employee records. If the retired employee only has one employee record, you can skip this part. **Part E: Apply the Base Benefits System to All Secondary Jobs** Main Menu > Workforce Administration > Job Information > Job Data	
F	**Assign a Retiree Benefit Program to the retired employee.** IMPORTANT: This is the only instance that you will manually update the Benefit Program. **Part F: Update the Employee's Benefit Program** Main Menu > Benefits > Enroll in Benefits > Assign to Benefit Program	

	Task (HR / BA / PY)	Person(s) Responsible
G	**Assess which benefits the employee was enrolled in prior to retirement and determine which benefits need to get updated or terminated.** **Part G: Assess Which Benefits Need to be Changed or Terminated** Main Menu > Benefits > Review Employee Benefits > Current Benefits Summary	
H	**Manually modify which benefits the retired employee will be enrolled in.** Since this process is now accomplished outside of Benefits Administration Benefit System, On-Demand cannot be used. Modification need to be completed directly onto the Enroll in Benefits screens. IMPORTANT: These steps should never be followed for any other employee other than a Retired employee. **Part H. Enroll the Retired Employee into Retiree Benefit Plans** Main Menu > Benefits > Enroll in Benefits	
I	**Manually terminate all benefits the retired employee is no longer eligible for or is waiving.** Since this process is now accomplished outside of Benefits Administration Benefit System, On-Demand cannot be used. Modification need to be completed directly onto the Enroll in Benefits screens. IMPORTANT: These steps should never be followed for any other employee other than a Retired employee. All non-eligible or waived benefits must be terminated accordingly. **Part I: Terminate Benefits No Longer Eligible For** Main Menu > Benefits > Enroll in Benefits	
J	**Confirm the manual enrollments that were input on the Enroll in Benefits screens.** **Part J: Verification of New Enrollments** Main Menu > Benefits > Review Employee Benefits > Current Benefits Summary	
K	**Audit and update the benefit deduction frequency.** You control the months in which a deduction should process. For Retirees enrolled in retiree benefits, the SDCOE Custom Override Deduction (Employee) screen must be updated with the correct benefit plan and the months in which deductions should process. **Part K: Audit and Update the Benefit Deduction Frequency** Main Menu > SDCOE Custom > Payroll > Processes > Override Deductions (Employee)	
L	**Add an additional pay to trigger the system to process benefits deductions during the on-cycle payroll processing.** NOTE: This must be set-up prior to the paysheet creation, in order for a retiree paysheet to create. If all HR data and RTB Additional Pay is not setup before the monthly paysheets are created, you will need to set up a manual paysheet and add the RTB additional pay to have retiree benefits process. **Part L: Input an Additional Pay to Trigger Benefits to Process in Payroll** Main Menu > Payroll for North America > Employee Pay Data USA > Create Additional Pay	
M	**Add an additional pay override for your retiree benefits contributions that aren't applied on a monthly basis.** This process will allow you to control which specific months in which you want the benefits to process. NOTE: This must be set up prior to the paysheet creation process for a given month. Example: If May is checked and you would not like it to process in May, you would need to add a row to this screen and uncheck May prior to the paysheet generation process which runs on the second business day in May. **Part M: Set up an Additional Pay Override (Retiree Benefits Not Paid Monthly)** Main Menu > SDCOE Custom > Payroll > Processes > Override Addl Pay (EMPLID)	
N	**Modify a current retiree's benefit enrollments.** This could entail a coverage level change or terminating a single plan coverage while keeping other plan coverages active. Since this process is now accomplished outside of Benefits Administration Benefit System, On-Demand cannot be used. Modification need to be completed directly onto the Enroll in Benefits screens. IMPORTANT: These steps should never be followed for any other employee other than a Retired employee. **Part N: Modify Current Retiree's Benefit Enrollments** Main Menu > Benefits > Enroll in Benefits	

	Task HR BA PY	**Person(s) Responsible**
O	**Terminate retiree benefits.** IMPORTANT: This process must be completed prior to the paysheet creation process for a given month. If it the process is completed after the paysheet has been created, the OK to Pay box must be unchecked on the RTB earnings code on the paysheet. NOTE: This must be set up prior to the paysheet creation process for a given month. Example: If May's paysheets have been created and you do not want the retiree benefits to process in May, you must uncheck the OK to pay for the RTB earnings code on the paysheet. **Part O: Terminate Retiree Benefits** Main Menu > Workforce Administration > Job Information > Job Data	