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How to Retire a Member in eEnroll – Non-Payroll Groups

August 22, 2016

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Retiring a Member in eEnroll – Non-Payroll Groups

This document outlines the process for how to retire a member in eEnroll that is moving to the Retirement System. Retiring a member in a timely and accurate way is critical to ensuring that the member is correctly enrolled in health coverage under the State Retirement System. The process for **non-payroll** groups is outlined below. If you have questions please call the HBR hotline (800) 422-5249.

Important Notes:

- Active groups carry the member through the end of the month in which the retirement occurred (i.e. Date of Retirement: 8/1 = benefits end 8/31). The Retirement System is set up to calculate a benefit effective date of the first of the month following the Date of Retirement date (i.e. Date of Retirement: 8/1 = benefits start 9/1).
- Medicare becomes primary the last month that a retiring member is covered by the active group. Please notify your Medicare eligible employees of the primacy change and the need to elect Medicare Part B to be effective the date of their retirement.
- Please review the Preparing for Retirement Overview on the State Health Plan's website.

Termination Due to Retirement – Over 65

You will follow these instructions to terminate a member's employment due to retirement if the Member and/or dependents already have an existing Medicare Policy in eEnroll. You can confirm an existing Medicare policy by clicking on the Manage Employee dropdown on the top right corner of the Employee profile and then clicking Manage Medicare to view policy information:

1. Open member's record in the eEnroll platform
2. Click on the Manage Employee dropdown menu
3. Select Terminate Employee from the dropdown menu
4. Enter the first day of the employee's last month of coverage as the termination date (i.e. Employee's termination date is 1/27/15 but their last month of active coverage is February 2015, termination date should be 2/1/2015)
5. Select Yes to disable the employee's login
6. Select the termination reason of Retirement (Not COBRA Eligible)

   IMPORTANT: A COBRA notice is not required since the member will have health coverage under the Retirement System.

7. Click Next

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8. If only one family member has a Medicare policy you will be presented with the member's Medicare Policy. Confirm that the member's Medicare Primary status has an effective date that is the first day of the last month of coverage (i.e. Employee's last month of coverage is February 2015, Medicare Primary status should have an effective date of 2/1/2015).

9. Click Update

10. Review Medicare details and confirm that Primary is effective the first day of the last month of coverage. If multiple family members have a Medicare Policy you will be presented with this overview page showing the updates to be made.

11. If all updates are correct, click Save.

12. Confirm the employee's benefits now reflect the appropriate cancellation date

13. Confirm the employee's employment status is now reflected in red as Terminated and Retired under his or her name in the top left corner of eEnroll.

14. Approve Pending Tasks

Termination Due to Retirement - Under 65

You will follow these instructions to terminate due to retirement when a Member is retiring and he or she is *under* 65. There is not a need for a Medicare Policy due to age. Please follow the steps below:

1. Open member's record in the eEnroll platform

2. Click on the Manage Employee dropdown menu

3. Select Terminate Employee from the dropdown menu

4. Enter the first day of the employee's last month of coverage as the termination date (i.e. Employee's termination date is 1/27/15 but their last month of active coverage is February 2015, termination date should be 2/1/2015)

5. Select Yes to disable the employee's login

6. Select the termination reason of Retirement (Not COBRA Eligible)

   IMPORTANT: A COBRA notice is not required since the member will have health coverage under the Retirement System.

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7. Since the Member is not eligible for Medicare, confirm that the benefits have been cancelled on the proper date and the termination date is correct.
8. Approve all outstanding tasks.

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