BENEFITFOCUS®
All Your Benefits. One Place.®

How to Retire a Member in eEnroll – Payroll Groups

August 22, 2016

©2016. Benefitfocus.com, Inc. All Rights Reserved. Words and logos identified by "®" or "™" and listed at https://www.benefitfocus.com/legal/trademarks are trademarks of Benefitfocus.com, Inc.

Table of Contents

Retiring a Member in eEnroll – Payroll Groups 3

Copyright 2016 Benefitfocus.com, Inc. | Confidential and Proprietary

Retiring a Member in eEnroll – 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 payroll groups is outlined below. If you have questions please call the HBR hotline (800) 422-5249.

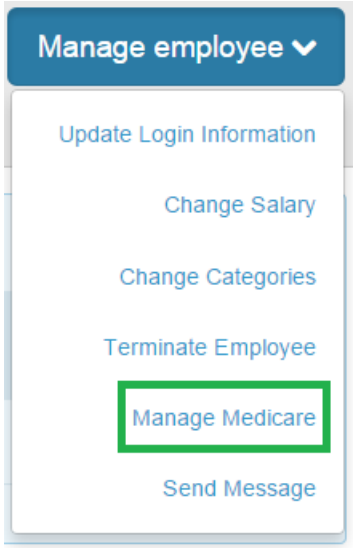
Important Notes:

- 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.

Important Note: Payroll groups are advised to terminate the members benefits in eEnroll prior to sending the termination of employment or retirement on the payroll file. This allows the HBR to update the Medicare policy for the last month and enter the correct benefit end dates.

1. Open member's record in the eEnroll platform

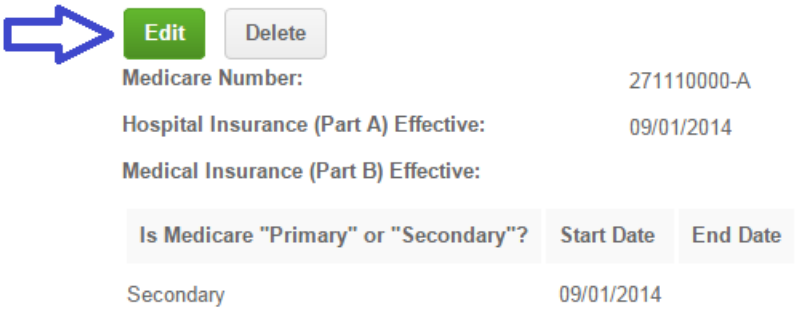
2. Click on the Manage Employee dropdown menu
    a. Only applicable if the member is currently Medicare eligible
    b. If the member is not Medicare eligible, please proceed to step 12



3. Select the *Manage Medicare* link

Copyright 2016 Benefitfocus.com, Inc. | Confidential and Proprietary

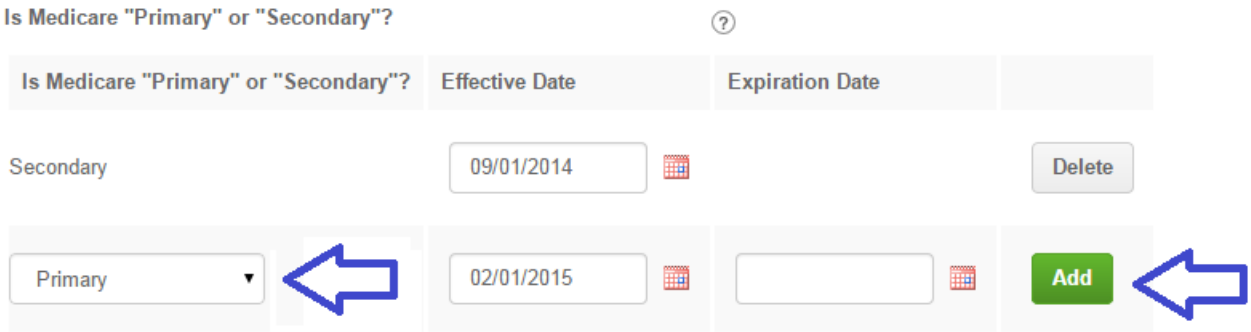
4. The Medicare policy should be auto-populated with the member's Part A and Part B effective dates. If the policy is not automatically set to Primary for the last month of active coverage, click the *Edit* button for the member's Medicare policy. If the policy information is correct, proceed to step 10.



5. Select Primary from the available dropdown menu

6. Enter the effective date for the member to move to Medicare Primary status
    a. IMPORTANT: This date will be the first day of the last month of coverage with the active agency (i.e. Last month of coverage is February 2015, date entered should be 2/1/15)

7. Click Add



8. Click Update at the bottom of the next page

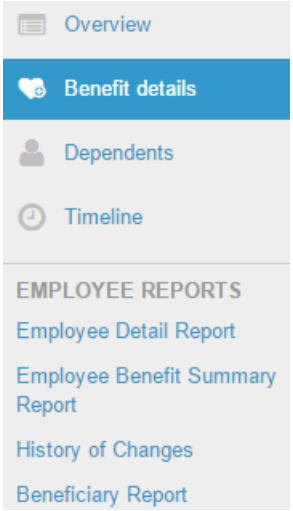
9. Repeat steps 4-8 for any other Medicare eligible dependents.
    a. If no dependents are Medicare eligible, proceed to step 10

10. Click Save

11. Approve Pending Task(s) generated from updating Medicare to primary

12. Click on the *Benefit Details* link on the left side of the screen

Copyright 2016 Benefitfocus.com, Inc. | Confidential and Proprietary



13. Click on the *Edit* button for the SHP Medical Section

14. Click on the *Cancel Benefits for All* button

15. Select **Retirement** as the reason for medical change

16. Click Next

17. Select *Yes* to indicate that you wish to continue with this change

18. Enter the last date that the employee will be covered under the active agency
    a. IMPORTANT: Please note that the date entered in this category should be the last date of coverage and not the last date of employment

Enter that date that you were notified of the pending retirement as the date that you were notified about this life event

Copyright 2016 Benefitfocus.com, Inc. | Confidential and Proprietary

*Reason for Change

You have selected a Retirement change reason.

You are permitted to perform the following adjustments to your insurance c

- You can cancel your coverage.
- You are NOT permitted to change your plan.
- You may change your coverage level.
- You CANNOT add any family members to your existing coverage.
- You can cancel coverage for any dependent.

Do you wish to continue with this change?

(•) Yes

( ) No

If yes, please enter the following:

***Enter last date employee qualifies for coverage** 02/28/2015

***When were you notified about this life event?** 01/27/2015

Previous Next

19. Click Next

20. Confirm that the correct Benefit End Date is populated

21. Click Next

22. Review Details to confirm appropriate data is reflected

23. Click Save

24. Approve Task(s)

25. Allow payroll process to terminate member and all ancillary benefits in accordance with standard payroll process

Copyright 2016 Benefitfocus.com, Inc. | Confidential and Proprietary