Suspending Retirement

INTRODUCTION

<table>
<thead>
<tr>
<th>Description</th>
<th>This process describes the steps necessary to suspend retirement for USG retirees who are returning to full time active employment. This also covers the steps required to return retirees to retirement.</th>
</tr>
</thead>
</table>
| Conditions  | If a retiree chooses to suspend his/her benefit so he/she can work more than one-half time, the following will take place:  
- All retirement payments will stop and the Retiree will become an active employee  
- Employee and employer contributions are not made on the employee’s behalf  
- The employee will not accrue additional service credit  
- No changes may be made to the plan of retirement or beneficiary  
- No cost-of-living adjustments (COLA) will be attributed to the benefit during suspension |

When the retiree stops working, his/her benefit payments will be reactivated and the COLAs will begin again.

**IMPORTANT**: Make a note of the retiree’s benefit elections as these will be needed when he/she returns to retirement.

PROCEDURES

<table>
<thead>
<tr>
<th>SECTION I</th>
<th>Returning Retiree to Active Full Time Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>PATH</td>
<td>Navigator &gt; Workforce Administration &gt; Job Data</td>
</tr>
</tbody>
</table>

**STEP 1a**

**Search for Retirement Record (Retired from another institution)**

**Notes:**
- If the employee retired from the same institution, proceed to step 1b.
- If the employee does not have a retiree record with the institution, submit a ticket to oneusgsupport@usg.edu for assistance with changing the Job Indicator to secondary on the retiree record.
- Do not terminate the retiree record. This is only done if the employee is rescinding/terminating retirement.
- Do not change existing retirement data. Once a retirement is entered, additional actions entered on top of a retirement will not flow to Alight.

- Enter the Employee ID (EMPLID):
- Click Search
### STEP 1b.1  Search for Retirement Record (Retired from same institution)
- Enter the Employee ID (EMPLID):
- Click **Search**
If the employee has multiple job records, select the retiree record.

#### Job Data
Enter any information you have and click Search. Leave fields blank for a list of all values.

<table>
<thead>
<tr>
<th>Search Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Empl ID</strong> begins with</td>
</tr>
<tr>
<td><strong>Empl Record</strong> =</td>
</tr>
<tr>
<td><strong>Name</strong> begins with</td>
</tr>
<tr>
<td><strong>Last Name</strong> begins with</td>
</tr>
<tr>
<td><strong>Second Last Name</strong> begins with</td>
</tr>
<tr>
<td><strong>Alternate Character Name</strong> begins with</td>
</tr>
<tr>
<td><strong>Middle Name</strong> begins with</td>
</tr>
<tr>
<td>Include History</td>
</tr>
</tbody>
</table>

- **Search**   - **Clear**   - **Basic Search**   - **Save Search Criteria**

### STEP 1b.2  Work Location Tab
- Click the (+) sign to insert a new row
- Enter the following data:
  - **Effective Date**: Enter the date the retiree will return to work
  - **Action**: Data Change
  - **Reason**: Update Data
  - **Job Indicator**: Secondary

### STEP 1b.3  Save the Record
You may receive the following message:
### STEP 2.1 Add New Employee Instance

**PATH**
Navigator > Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance

- Enter the **Empl ID**
- Click **Add Relationship**

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### STEP 2.2 Work Location Tab

Enter the following data:
- **Effective Date:** Enter the new hire date
- **Action:** Hire
- **Reason:** New Employee Instance
- **Job Indicator:** Primary
- **Company:** Enter the new company code
- **Position Number:** Enter the new position

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### STEP 2.3 Job Information Tab

- Verify **Reports To** information
- Enter an **Supervisor ID** if the Reports To field is empty
<table>
<thead>
<tr>
<th>STEP 2.4</th>
<th>Payroll Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensure the following fields are populated correctly:</td>
<td></td>
</tr>
<tr>
<td>• Pay Group</td>
<td></td>
</tr>
<tr>
<td>• Employee Type</td>
<td></td>
</tr>
<tr>
<td>• Tax Location Code</td>
<td></td>
</tr>
<tr>
<td>• Holiday Schedule</td>
<td></td>
</tr>
<tr>
<td>• FICA Status</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>STEP 2.5</th>
<th>Salary Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensure the <strong>Salary Admin Plan</strong> is populated correctly, if this is utilized by your institution.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>STEP 2.6</th>
<th>Compensation Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter the following data:</td>
<td></td>
</tr>
<tr>
<td>• <strong>Frequency</strong></td>
<td></td>
</tr>
<tr>
<td>• Under <strong>Pay Components</strong>, enter the following data:</td>
<td></td>
</tr>
<tr>
<td>- Rate Code</td>
<td></td>
</tr>
<tr>
<td>- Comp Rate</td>
<td></td>
</tr>
<tr>
<td>- Frequency</td>
<td></td>
</tr>
<tr>
<td>• Click <strong>Calculate Compensation</strong></td>
<td></td>
</tr>
<tr>
<td>• Open <strong>Pay Rates</strong> and verify the salary/pay rate is correct</td>
<td></td>
</tr>
</tbody>
</table>
### STEP 2.7 Benefits Program Participation Link

Enter the following data:
- **Annual Benefits Base Rate (ABBR):** Enter the annual base compensation amount
- In the **Benefits Program Participation** area, click the (+) sign to add a new row
- **Effective Date:** Use the new hire date
- **Benefits Program:** USG

<table>
<thead>
<tr>
<th>Job Data</th>
<th>Employment Data</th>
<th>Earnings Distribution</th>
<th>Benefits Program Participation</th>
</tr>
</thead>
</table>

### STEP 2.8 Employment Data Link

- Click the **Override** box
- Enter the new hire date for the following fields
  - **USG Service Date**
  - **Institution Seniority Date**
  - **Benefits Service Date**

### STEP 2.9 Save the Record

You may receive a warning message regarding the primary job. Click **OK** to continue saving and then be sure to verify the primary job indicator is setup correctly.

### Notes:

- When the new hire data is entered and the primary job indicator is moved to the active record, the information will flow to Alight. Alight will then suspend retiree benefits and open a new election window for active employee benefits.
- The employee should **not** have the Ret-Rehire box checked or have a job code with a subcat of Z. These should only be used for USG Retirees who are receiving retirement benefit payments and working less than half time.
- The job code should match the employee’s job duties and responsibilities.
- **Be sure to check** **Maintain Time Reporter** panel to ensure it is setup correctly.
### STEP 3.0  Review Maintain Time Reporter panel

**PATH**

Navigator > Time and Labor > Enroll Time Reporters > Maintain Time Reporter Data

- Enter the **Empl ID**
- Click **Search**

### Maintain Time Reporter Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

**Search Criteria**

- **Empl ID** begins with
- **Empl Record**
- **Name** begins with
- **Last Name** begins with
- **Business Unit** begins with
- **Department** begins with
- **Workgroup** begins with
- **Organizational Relationship**

- Include History
- Correct History
- Case Sensitive

[Search] [Clear] [Basic Search] [Save Search Criteria]

### STEP 3.1  Time Reporter Data

- Compare data in new row to historical row and ensure current data is accurate.
### SECTION II  Returning Retiree to Retirement

**PATH**
Navigator > Workforce Administration > Job Data

**Notes:**
When you receive notification that an employee is going back into retirement, you will need to enter the **Intent to Rehire Date** on the active record.

The **Intent to Retire Date** is needed only if the employee:
- Has reached Medicare age of 65
- Is already enrolled in healthcare through the Exchange

<table>
<thead>
<tr>
<th>STEP 1.1</th>
<th>Search for Employee</th>
</tr>
</thead>
</table>
| • Enter the **Employee ID (EMPLID):**  
• Click **Search** |

**Job Data**
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value  Keyword Search

**Search Criteria**

- **Empl ID** begins with ▼
- **Empl Record** = ▼
- **Name** begins with ▼
- **Last Name** begins with ▼
- **Second Last Name** begins with ▼
- **Alternate Character Name** begins with ▼
- **Middle Name** begins with ▼

Include History  Correct History  Case Sensitive

**STEP 1.2  Work Location Tab**

- Click the (+) sign to insert a new row
- Enter the following data:
  - **Effective Date:** Use today’s date
  - **Action:** Data Change
  - **Reason:** Update Data
**STEP 1.3** Employment Data Link

**Intent to Retire Date:** Date employee plans to return to retirement

**STEP 1.4** Save the Record

**STEP 2.1** Terminate Active Employment Record

On the active record, click the (+) sign to add a new row

**STEP 2.2** Work Location Tab

Enter the following data:
- **Effective Date:** Enter the new termination date
- **Action:** Termination
- **Reason:** Enter appropriate action
- **Job Indicator:** Secondary

**STEP 2.3** Save the Record

**STEP 2.4** Benefits Program Participation Link

Enter the following data:
- In the **Benefits Program Participation** area, click the (+) sign to add a new row
- Enter the following data:
  - **Effective Date:** Use the new termination date
  - **Benefits Program:** RET

**IMPORTANT:** Submit a ticket to oneusgsupport@usg.edu for assistance with returning the retiree to retirement.

- Institution should provide a copy of the employee’s prior retirement benefit elections
- OneUSG Connect will assist with moving the primary job back to the retiree record
- OneUSG Connect will submit an ad hoc file to Alight to restore retiree benefits

**STEP 2.5** Save the Record
Useful TRS of Georgia Links

Suspending or Terminating Retirement
https://www.trsga.com/employer/hiring-trs-retirees/suspending-or-terminating-retirement

Suspending or Terminating Benefit Payment
https://www.trsga.com/retiree/working-after-retirement/suspending-or-terminating-benefit-payment

Retirees Suspending or Terminating Benefits Form
https://www.trsga.com/downloadForms/retirees_suspending_or_terminating_benefits.pdf

2016 Employer Reference Guide