Suspending Retirement

INTRODUCTION

Description	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.
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

SECTION I	Returning Retiree to Active Full Time Employment
PATH	Navigator > Workforce Administration > Job Data
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.

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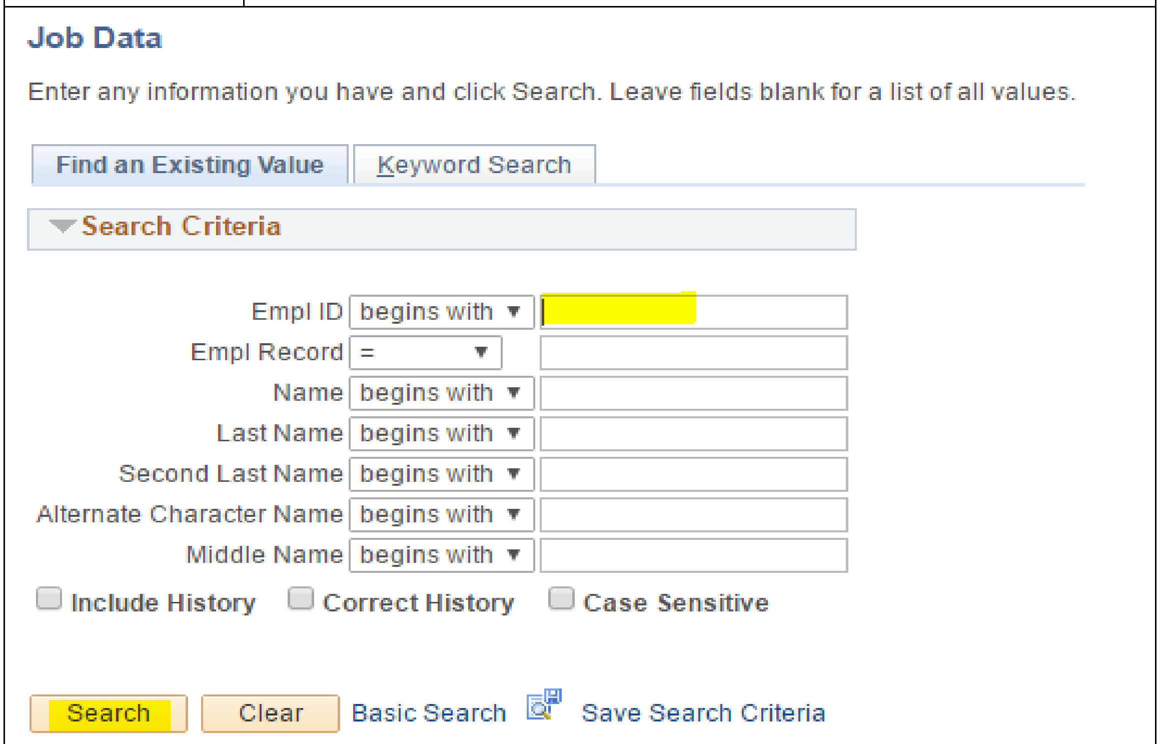
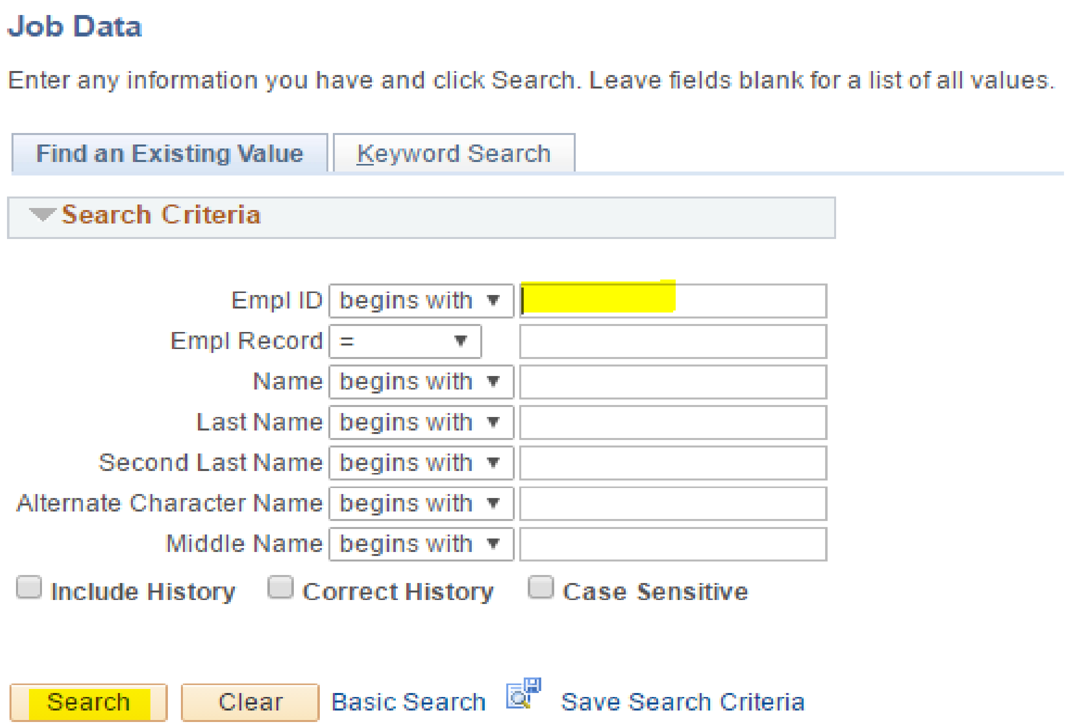
	• **Do not** terminate the retiree record. This is only done if the employee is **rescinding/terminating** retirement. • **Do not** change existing retirement data. Once a retirement is entered, additional actions entered on top of a retirement will not flow to Alight.
	• Enter the **Employee ID (EMPLID)**: • 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.



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:

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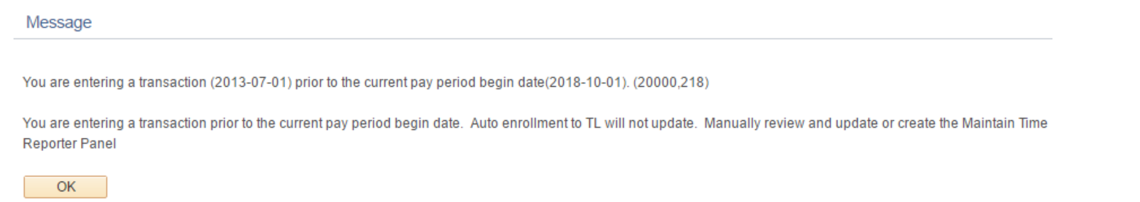
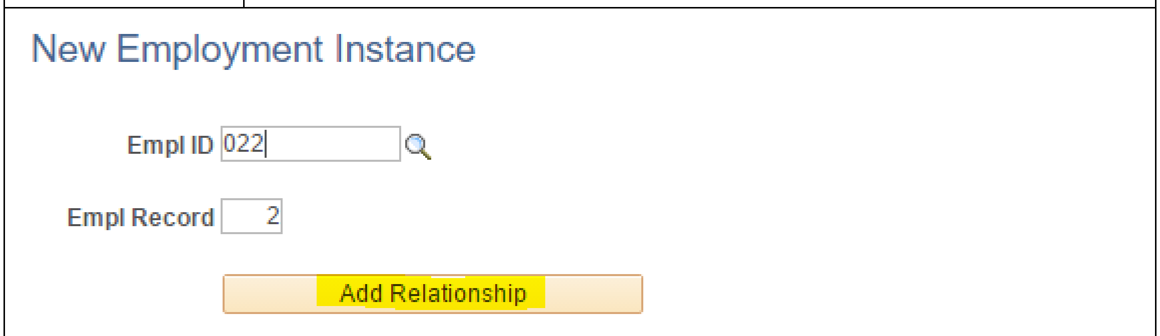


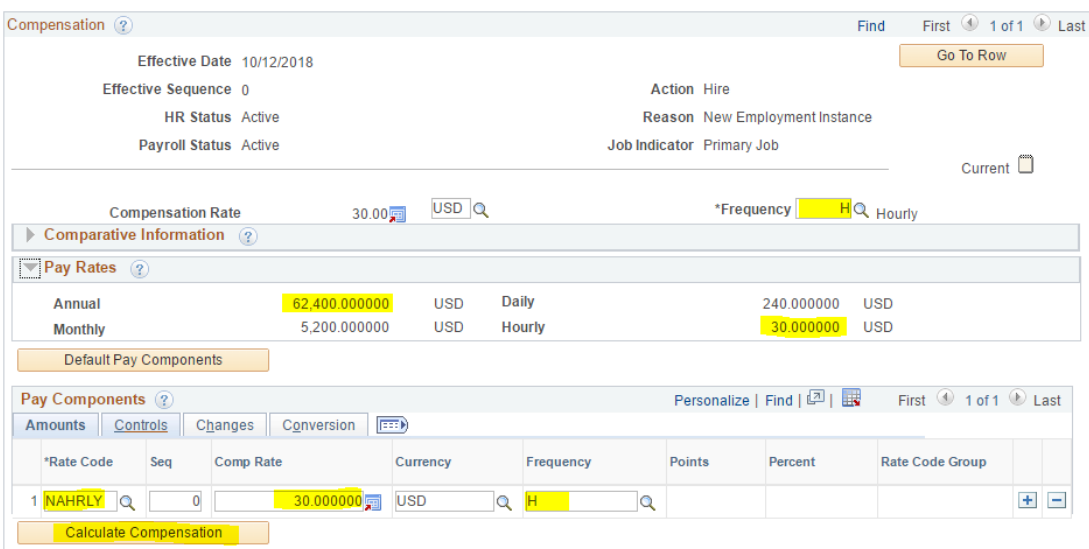
	Click **OK** to continue saving.
STEP 2.1	**Add New Employee Instance**
PATH	Navigator > Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance
	• Enter the **Empl ID** • Click **Add Relationship**



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
STEP 2.3	**Job Information Tab**
	• Verify **Reports To** information • Enter an **Supervisor ID** if the Reports To field is empty

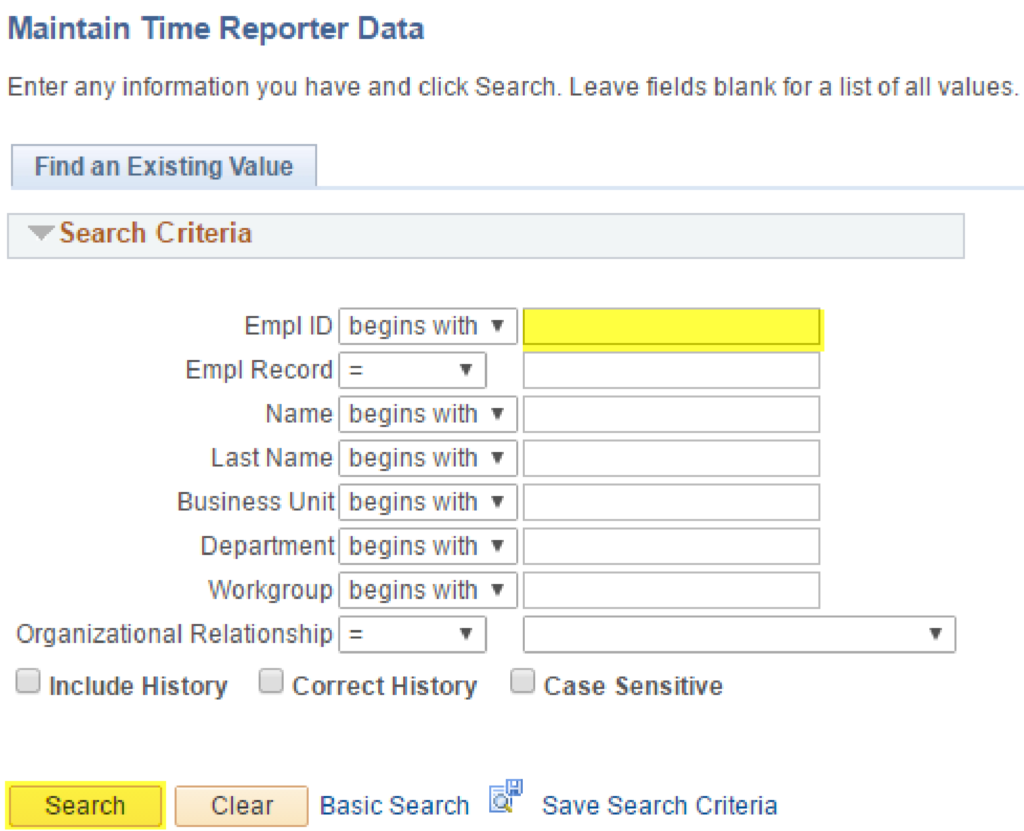
STEP 2.4	**Payroll Tab**
	Ensure the following fields are populated correctly: • **Pay Group** • **Employee Type** • **Tax Location Code** • **Holiday Schedule** • **FICA Status**
STEP 2.5	**Salary Tab**
	Ensure the **Salary Admin Plan** is populated correctly, if this is utilized by your institution.
STEP 2.6	**Compensation Tab**

	Enter the following data:
	• **Frequency**
	• Under **Pay Components,** enter the following data:
	  – **Rate Code**
	  – **Comp Rate**
	  – **Frequency**
	• Click **Calculate Compensation**
	• Open **Pay Rates** and verify the salary/pay rate is correct



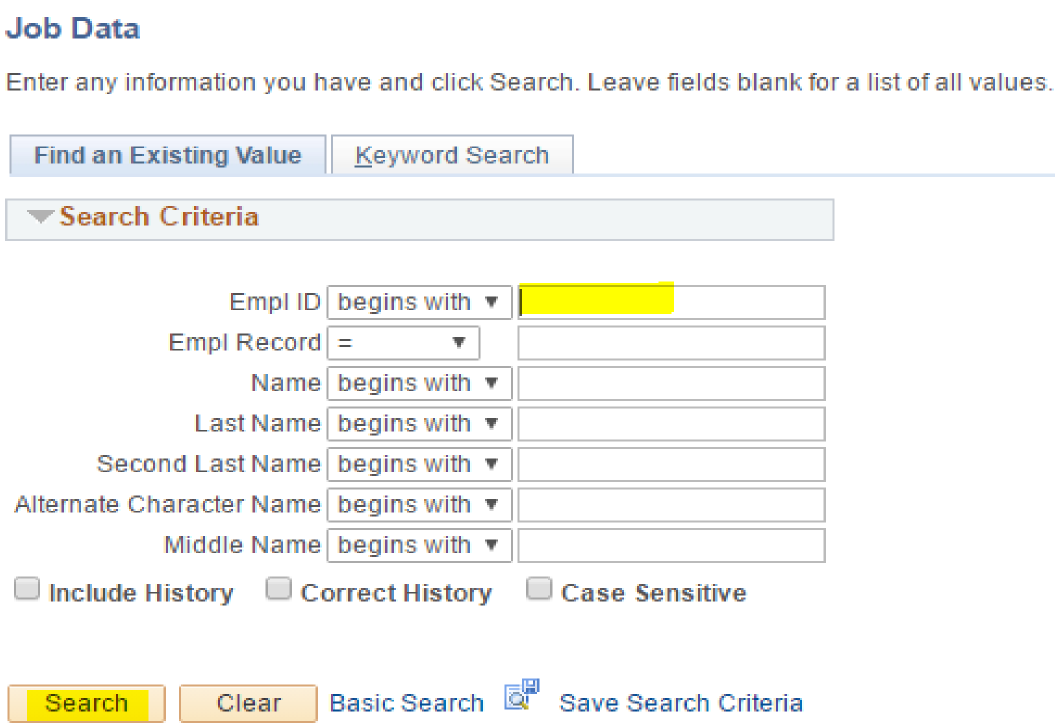
<table>
<tr><td>STEP 2.7</td><td>Benefits Program Participation Link</td></tr>
<tr><td></td><td>Enter the following data:
Annual Benefits Base Rate (ABBR): Enter the annual base compensation amount
In the Benefits Program Participation area, click the (+) sign to add a new row
Effective Date: Use the new hire date
Benefits Program: USG</td></tr>
<tr><td colspan="2">Job Data | Employment Data | Earnings Distribution | Benefits Program Participation</td></tr>
<tr><td>STEP 2.8</td><td>Employment Data Link</td></tr>
<tr><td></td><td>Click the Override box
Enter the new hire date for the following fields
USG Service Date
Institution Seniority Date
Benefits Service Date</td></tr>
<tr><td>STEP 2.9</td><td>Save the Record</td></tr>
<tr><td></td><td>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.</td></tr>
<tr><td>Notes:</td><td>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.</td></tr>
</table>

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**



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
STEP 1.1	**Search for Employee**
	• Enter the **Employee ID (EMPLID)**: • Click **Search**



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

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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
https://www.trsga.com/uploads/Employer-Reference-Guide-2016-web.pdf