

# 9.2 Enrolling an Employee in a Retirement Plan

**Purpose:** Use this document as a reference for enrolling benefit eligible staff member in a retirement plan in ctcLink.

**Audience:** Benefits Administrators.

 You must have at least one of these local college managed security roles:

- ZC Benefits Enrollments
- ZD Benefits Enrollment Inquiry

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

## Enrolling an Employee in a Retirement Plan

**Navigation:** NavBar > Menu > Benefits > Enroll in Benefits > Retirement Plans

1. The **Retirement Plans** search page displays.
2. You must know the Empl ID or name of the employee you want to enroll in the benefit. Enter their ID in the **Empl ID** field.
3. Select the **Search** button.

**Retirement Plans**

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

Benefit Record Number =

Name begins with

Last Name begins with

Business Unit begins with

Department Set ID begins with

Department begins with

Organizational Relationship =

Alternate Character Name begins with

Include History  Correct History  Case Sensitive

[Basic Search](#)

4. The **Retirement Plans** page displays.
5. Confirm the employee is enrolled in either **SB1** (*primary benefits*) or **SB2** (*secondary benefits*) Benefit Program. (If the employee's benefit program is set to **SB0** (*403b/457 retire/tax dfer cont*), you will not be able to enroll this employee in benefits inclusive of retirement plan setup).
6. Select the **lookup** (magnifying glass) next to **Plan Type** at the top of the page and choose the desired option:
  - 7X - SBRP Retirement Plan TIAA-CREF
  - 7Y - Teacher's Retirement System WA
  - 7Z - Public Employees Retirement WA
7. Enter the **Deduction Begin Date**, which is the first day employee became eligible for retirement benefit.
8. **Coverage Election** should be **Elect**.
9. **Election Date** for employee's retirement plan setup is synonymous with **Benefit Eligibility Date**. Because this date will default to the system's effective date, make sure that this date is updated to reflect the correct benefit eligibility/election date.
  - While an **Election Date** can be earlier than a **Deduction Begin Date**, it must never be later than the **Deduction Begin Date**.
  - When moving employee, for example, from PERS2 to PERS3 plan, the **Election Date** (**Benefit Eligibility Date**) will not change.
  - **Retirement is the only enrollment screen in which Election Date must be changed purposefully. (Refer to *Dates on Retirement Plan Page QRG*).**
10. Use the **lookup** tool to choose the desired **Benefit Plan** (Benefit Plan options will be limited to the Plan Type chosen).
11. Select the **Save** button.

## Retirement Plans

Employee ID Benefit Record Number

Plan Type 7Z Public Employees Retirement WA

Coverage

\*Deduction Begin Date 11/16/2022

Participation Election  Elect  Waive  Terminate

\*Election Date 11/16/2022

Benefit Program SB1 Primary Benefits inc HCA

Benefit Plan PER2 PERS Plan 2

Payroll Status Active

Option Code

Same as Benefit Eligibility Date

## Making PERS/TRS Retirement Plan Selection Changes (for example, moving an employee from PERS 2 to PERS 3 plan)

Navigation: NavBar > Menu > Benefits > Enroll in Benefits > Retirement Plans

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3. Select the **Search** button.

**Retirement Plans**

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 [ ]

Benefit Record Number = [ ]

Name begins with [ ]

Last Name begins with [ ]

Business Unit begins with [ ]

Department Set ID begins with [ ]

Department begins with [ ]

Organizational Relationship = [ ]

Alternate Character Name begins with [ ]

Include History  Correct History  Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

4. The **Retirement Plans** page displays.

### Retirement Plans

Employee ID Benefit Record Number

Plan Type 7Z Public Employees Retirement WA

Coverage

\*Deduction Begin Date 11/16/2022

Participation Election  Elect  Waive  Terminate

Benefit Program SB1 Primary Benefits inc HCA

Benefit Plan PER2 PERS Plan 2

\*Election Date 11/16/2022

Payroll Status Active

Option Code

Same as Benefit Eligibility Date

5. Select the plus sign (+) in the lower portion of the Retirement Plans window to add a new row.

Plan Type 7Z Public Employees Retirement WA

Coverage

\*Deduction Begin Date 11/16/2022

Participation Election  Elect  Waive  Terminate

Benefit Program SB1 Primary Benefits inc HCA

Benefit Plan PER2 PERS Plan 2

\*Election Date 11/16/2022

Payroll Status Active

Option Code

6. New data row populates - see image below.

Plan Type

Plan Type 7Z Public Employees Retirement WA

Coverage

\*Deduction Begin Date 12/16/2022

Participation Election  Elect  Waive  Terminate

Benefit Program SB1 Primary Benefits inc HCA

Benefit Plan PER3A PERS 3 - WSIB - 5% All

\*Election Date 11/16/2022

Payroll Status Active

Option Code

7. Update **Election Date (Benefit Eligibility Date)** to reflect the date populated on the original data row. (Moving an employee, for example, from PERS2 to PERS3 plan, the Election Date (Benefit Eligibility Date) will not change.)
8. Enter the **Deduction Begin Date** to coincide with the first day of the payroll cycle on which the new **Benefit Plan** deduction starts.
9. Select **Benefit Plan**.
10. Select the **Save** button.

End of procedure.

**i** For information on retirement plan options for non-retired employees working in positions eligible for participation in a Higher Education Retirement Plan (HERP) or for a DRS-administered plan, please review the **Reporting in Higher Education** section by accessing the following link: <https://www.drs.wa.gov/employer/ch5/#reporting-in-higher-education>