

Dates on Retirement Pages

Purpose: Use this document as a reference for what to enter for the dates on the Retirement Plans in ctLink and what is their significance in the downstream data flow to DRS. This is to be followed while hiring or while changing the Retirement plans.

Audience: Benefits Administrators, HR Core 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.

Retirement Plans

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

For full information regarding enrolling employee in a retirement plan, see [Enrolling Employee in a Retirement Plan](#) QRG.

1. The **Retirement Plans** search page displays.
2. Enter the applicable **Search Criteria**.
3. Select the **Search** button.
4. The **Retirement Plans** page displays.
5. The **Deduction Begin Date** and **Election Date** will be the same on this page when completing initial enrollment data row for DRS administered plans (Plan Type 7Z and 7X).

Employee Self Service Retirement Plans

Retirement Plans

State: [redacted] Employee ID: 10 Benefit Record Number: 220

Plan Type: [redacted] Public Employees Retirement WA

Coverage: [redacted]

*Deduction Begin Date: 08/23/2018

Participation Election: Elect Waive Terminate

*Election Date: 08/23/2018

Benefit Program: Primary Benefits inc HCA

Benefit Plan: PER2 PERS Plan 2

Payroll Status: Active

Option Code: [redacted]

Buttons: Save, Return to Search, Notify, Refresh, Update/Display, Include History, Correct History

6. An Issue arises when the **Deduction Begin Date** is *earlier* than the **Election Date**. It means the retirement deductions will be taken prior to the employee becoming retirement eligible.
7. The **Begin Date** on the DRS Transaction Page is the **Election Date** entered on the **Retirement Plans** Page.
8. Section complete.

DRS Transaction

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

- **ZD DRS Processing Inquiry**
- **ZZ DRS Processing**

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

Navigation: Benefits > CTC Custom > DRS Transaction

1. The **DRS Transaction** search page displays.
2. Enter the **Search Criteria**.
3. Select the **Search** button.
4. The **DRS Transaction** page displays.

- The **Election Date** - which is employee's eligibility date for retirement benefits on Retirement Plans page is the **Begin Date** on the DRS Transaction page.

DRS Transaction

DRS Transaction

Empl ID: 101 Ste: [redacted]

Find | View All First 1 of 1 Last

*Begin Date: 08/23/2018 Sent Date: 09/07/2018 *Benefit Record: 220

Separation Date: [] Retiree Type: [] *Plan Type: 7Z

Separation Sent Benefit Plan: PER2

Find | View All First 1 of 13 Last

*Reporting Period: 201905 Reporting Period Sent

Version: 01 Retirement Gross: 5270.74

*Pay End Date: 05/15/2019 Retirement Deductions: 390.56

Retirement Contribution: 676.24

Personalize | Find [] [] First 1 of 1 Last

*Transaction Date	Empl Record	Source	Status	Ret Earnings	Ret Deduction	Ret Contribution	Ret Time	Hours/Days
05/15/2019		OP	A	5270.74	390.56	676.24	88.34	Hours

Save Return to Search Notify Add Update/Display

- Section complete.

Retirement Fields

i This page is used to capture employee's retirement plan selection as well as the date on which retirement plan selection was made. Entries made on this page must coincide with the data populated on the **Retirement Plans** page.

For full information regarding Retirement Fields page entries, see [Retirement Fields](#) QRG.

Navigation: Benefits > CTC Custom > Retirement Fields

- The **Retirement Fields** search page displays.
- Enter the **Empl ID**.
- Select the **Search** button.
- The **Retirement Fields** page displays.
- Effective Date** on Retirement Fields page = **Deduction Begin Date** on the Retirement Plans page.
- Retirement Plan Effective Date** on Retirement Fields page = **Election Date** on Retirement Plans page.

7. **DRS Option:** DRS plan choice selection made by employee (leave blank if employee does not make a plan choice).
8. **DRS Option Date:** Date when DRS plan choice selection is made by employee (leave blank if employee does not make a choice).

DRS Transactions Retirement Fields

Retirement Fields

Employee ID: [redacted] Benefit Record Number 220

Retirement Fields Find | View All First 1 of 1 Last

*Effective Date: 08/23/2018

TIAA-CREF Mode: [dropdown] Current Retirement Plan

Retiree Type: [dropdown]

DRS Option: [dropdown]

DRS Option Date: [date field]

Ret Deduction Ind: [dropdown]

Prior RET Plan: [dropdown]

Retirement Plan Effective Date: [date field]

Save Return to Search Add Update/Display Include History Correct History

The process to review and understand the importance of dates on the retirement plan pages is now complete.

End of procedure.