

# Enrollment with Eligibility - Retirement Enrollment

## Overview

This instruction will show how to enroll an employee in their retirement plan(s).

 Refer to the appropriate Retirement handbook for the correct start dates.

Once the employee's benefit selections are made, enroll the employee in benefits using Enrollment with Eligibility. To enroll an employee in benefits, refer to the [Enrollment of Employee with Eligibility - Benefits](#) work instructions.

## NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website: <http://www.das.state.ne.us/>.

## Navigation

Click Roles, HR\_PR .  
(Citrix users – right click on the menu, choose View by Role, choose HR\_PR.)

Human Resources and Payroll - Agencies > Benefits Administration > Enrollment with Eligibility

## Steps

### Enroll an Employee in Retirement

Start this instruction from the Enrollment with Eligibility – Work with Enrollment with Eligibility window.

Employee Identification:

Effective Date:   Display Elected Plans and Plan Options

**General** | Flex Elections

Benefit Group:  Benefit Status:

Benefit Group Rule:  Agency Original Hire Date:

Pay Frequency:  Total Payroll Deduction:

No records fetched.

Category	Category Rule	Plan ID	Plan Description	Plan Option	Plan Option Description	M	P

1. Complete the following fields in the header:
  - Employee Identification
  - Effective Date – enter the first day of the pay period the retirement deductions should begin.
2. In the QBE above Category, type RET\* and click **Find**.

Employee Identification: 125550 TEST, BRENDA S

Effective Date:   Display Elected Plans and Plan Options

**General** | Flex Elections

Benefit Group: PAT-M STATE PATROL-MONTHLY Benefit Status: A Active

Benefit Group Rule: 0 N/A Agency Original Hire Date: 01/11/1999

Pay Frequency: M Monthly Total Payroll Deduction:

No records fetched.

Category	Category Rule	Plan ID	Plan Description	Plan Option	Plan Option Description	M	P
RET*							

3. Only the employee's eligible retirement plans will appear.

Employee Identification: 125550 TEST, BRENDA S  
 Effective Date: 01/09/2006  Display Elected Plans and Plan Options

**General** | Flex Elections

Benefit Group: PAT-M STATE PATROL-MON... Benefit Status: A Active  
 Benefit Group Rule: 0 N/A Agency Original Hire Date: 01/11/1999  
 Pay Frequency: M Monthly Total Payroll Deduction: 85.32

Category	Category Rule	Plan ID	Plan Description	Plan Option	Plan Option Description	M	P
<input checked="" type="checkbox"/>	RETIRE	No rules apply-select any its	RET00000	STATE EMPLOYEE'S RETIREMENT-A			N
<input checked="" type="checkbox"/>			RET00001	STATE EMPLOYEE'S RETIREMENT-B			N
<input type="checkbox"/>			RET00004	STATE PATROL RETIREMENT PLAN			N

4. Review the information in the following fields:
  - Benefit Group
  - Benefit Status – The Benefit Status must be Active (A)
  - Last Start Date
  - Pay Frequency
5. Place a check mark in the appropriate retirement plans in which the employee should be enrolled.
  - If an employee will be enrolled in the State Employee Retirement plan, the employee will need plan ID RET00001.
6. Click **Row, Elect**. A check mark will appear to the left of the Category.

Employee Identification: 1117504 JOE, GI  
 Effective Date: 05/04/2007  Display Elected Plans and Plan Options

**General** | Flex Elections

Benefit Group: SSPB07 STATE SPLIT PRIMARY BW07 Benefit Status: A ACTIVE  
 Benefit Group Rule: 0 N/A Agency Original Hire Date: 05/27/2003  
 Pay Frequency: B BI-WEEKLY Total Payroll Deduction: 70.75

Category	Category Rule	Plan ID	Plan Description	Plan Option	Plan Option Description	M	P	Date Eligible
<input checked="" type="checkbox"/>	RETIRE	NO RULES APPLY-SELECT	RET00001	STATE EMPLOYEE'S RETIREMENT-B		N	N	06/01/07
<input type="checkbox"/>			RET00002	JUDGE'S RETIREMENT PLAN 6%		N	N	
<input type="checkbox"/>			RET00005	TEACHER'S RETIREMENT PLAN		N	N	
<input type="checkbox"/>			RET00006	DEPT. OF LABOR RETIREMENT PLAN		N	N	
<input type="checkbox"/>			RET00007	TIAA (POST 2ND ED) RETIRE PLAN		N	N	
<input type="checkbox"/>			RET00009	TIAA-D ST COLL RETIREMENT PLAN		N	N	
<input type="checkbox"/>			RET00009	TIAA-4 ST COLL RETIREMENT PLAN		N	N	
<input type="checkbox"/>			RET00010	TIAA-C ST COLL RETIRE PLAN VOL		N	N	
<input type="checkbox"/>			RET00011	IDS TAX SHELTERED ANNUITY		N	N	
<input type="checkbox"/>			RET00012	TIAA-CREF 457(D)		N	N	

7. Click **Submit** to return to a blank Enrollment with Eligibility - Work with Enrollment with Eligibility window.
8. Click **Close**.

## Complete Pension field on Employee Master

The Pension field should only be populated when the employee's retirement deductions actually begin. This field cannot be populated if the employee was not enrolled in Retirement during the year.

Once an employee's retirement deductions begin, the Pension field on the Employee Master must be populated with a "Y."

-  This will ensure that Box 13 on the employee's form W-2, Wage and Tax Statement, will indicate participation in a retirement plan. This is important, as this can have an affect on how much an employee is allowed to contribute to an Individual Retirement Accounts (IRA).

Navigation: Human Resources and Payroll - Agencies > Employee Maintenance > Employee Information

1. Enter the Employee address book number in the Employee No field in the QBE line.
2. Click **Find**.
3. Choose the employee and click **Row, Eligibility/NDT**. The Employee Information - Eligibility, NDT, and Participation window appears.
4. Enter "Y" in the Pension field in the Participation section.
5. Click **OK**. The Change Reason window appears.
6. Complete the following information:
  - Effective On - enter date on which the change is to take effect.
  - Change Reason -
7. Click **OK** to return to the Employee Information - Work with Employee Information window.
8. Click **Close**.