



How to Retire a Member in eBenefits

March 24, 2018

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How to Retire a Member in eBenefits

Retiring a member in a timely and accurate way is critical to ensuring that the member is correctly enrolled in the State Retirement System. For groups with payroll integration a different work-flow is necessary. The process for both payroll and non-payroll groups is outlined below. If you have questions please call the HBR hotline (800)422-5249.

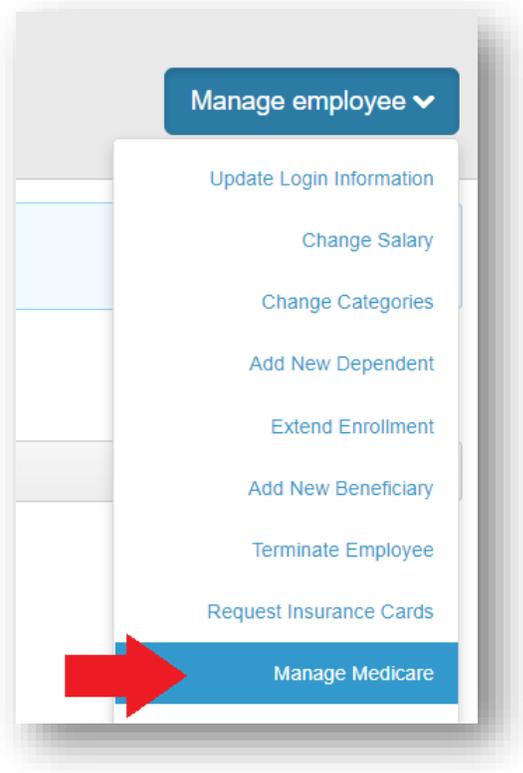
****Depending on members Medicare Eligibility, and the period in which the Retirement qualifying life event takes place, will require different steps****

Payroll Groups (Employing units that receive a file to load deductions)

Note: Payroll groups are advised to cancel the members benefits in eBenefits prior to sending the termination of employment on the payroll file. This allows the HBR to update the Medicare policy for the last month and enter the correct benefit end dates.

Keying Retirement more than 30 days in advance, for Medicare Eligible employee:

1. Open member's profile in eBenefits platform
2. Best practice is to confirm member's Medicare information is correct before keying the Retirement life event (See screen shot below for an example. If the member is over the age of 65, the member should already have the Secondary Medicare status on file.)
3. Click Manage Employee blue button
4. Select 'Manage Medicare'



[Edit](#) [Delete](#)

Medicare Number:

Hospital Insurance (Part A) Effective: 04/01/2017

Medical Insurance (Part B) Effective:

Is Medicare "Primary" or "Secondary"?	Start Date	End Date
Secondary	04/01/2017	

[Cancel Without Saving](#) [Save](#)

- If the member does not reflect Medicare Secondary, please follow the steps under 'Keying Retirement within 30 days, for Medicare Eligible employee'

5. Click 'Benefit Detail' tab on the left

[Overview](#)
[Benefit details](#)
[Dependents / Beneficiaries](#)
[Documents](#)
[Benefit eligibility](#)
[Employee History](#)

EMPLOYEE REPORTS

- [Subscriber Detail Report](#)
- [Confirmation Statement](#)
- [Beneficiary Report](#)

NANCY has 0 pending tasks

Benefits Snapshot

Current Benefits

- Medical**
 70/30 PPO Plan | Employee Only | Effective as of 01/01/2018
- NCFlex Accident Plan**
 NCFlex Accident Plan | Employee Only | Effective as of 01/01/2018
- NCFlex Health FSA**
 Coverage Declined
- Dependent Day Care FSA**
 Coverage Declined

6. Select 'Edit' button next to active Medical enrollment

2018 SHP Medical

 [Edit](#)

Medical - Basic Code: CAREMARK, Benefit Option: MEA, Carrier Code: CAREMARK, Company Code: S25001, Control Number: ZZ, Package ID: 4E19, Payroll Attribute 1: 183080881, Payroll Attribute 2: SNGN, Standard 834 Attribute 01: 0274, Standard 834 Attribute 02: NCBF, Standard 834 Attribute 03: BENEFITFOCUSHP, Standard 834 Attribute 05: BENEFITFOCUSHP, Standard 834 Attribute 06: S25001, Standard 834 Attribute 11: 001, Tier Code: SNGN

Status: Accepted
Plan Name: 70/30 PPO Plan
Coverage Level: Employee Only
Covered Persons: effective 01/01/2018)

7. Select 'Cancel Benefits for All'

Current Benefits
2018 SHP Medical

Changes Requiring a Change Reason

Medical	Accepted
Plan	70/30 PPO Plan
Coverage Level	Employee Only

Persons Covered

Name	Relationship
NANCY K HAYES	Subscriber
	Member ID: :
	Alternate ID: :

To edit a person's Name or SSN, click the person's name.

[Edit due to Change Reason](#) [Cancel Benefits for All](#)

8. Cancel Member's benefits due to life event 'Retirement'

Current Benefits
2018 SHP Medical

Reason for Medical Change
You have selected to cancel the entire benefit and these are

- Retirement
- Select a new change reason--
- Death of employee
- Employee reaches age 65
- FMLA Nonpay (Dependent)
- FMLA Subscriber Nonpay (Employee)
- FMLA Subscriber Requested Cancellation
- Former Legislator
- Leave of Absence
- Loss of coverage due to non-payment
- Military Leave
- Now eligible for other coverage
- Reduction in Force
- Reduction of hours
- Retirement

Export Details

9. Click 'Next'

Current Benefits
2018 SHP Medical

Reason for Medical Change
You have selected to cancel the entire benefit and th

- Retirement
- Other (Correction, etc.)

Cancel **Next**

10. Select 'Yes' to continue with change, and fill out date fields with appropriate coordinating dates:

- Enter last date employee qualifies for coverage = effective date of retirement (i.e. 07/01/2018)
- When were you notified about this life event = this should be the date notified about Retirement; this can sometimes be first day of the last month of employment

Please note: The first date is what triggers the end date of benefits

11. Click 'Next'

You can cancel coverage for any dependent.

Do you wish to continue with this change?

Yes

No

If yes, please enter the following:

Enter last date employee qualifies for coverage*

When were you notified about this life event?*



12. Notice the member's Medicare Part B has become effective the month of termination

13. Click 'Save'

Current Benefits

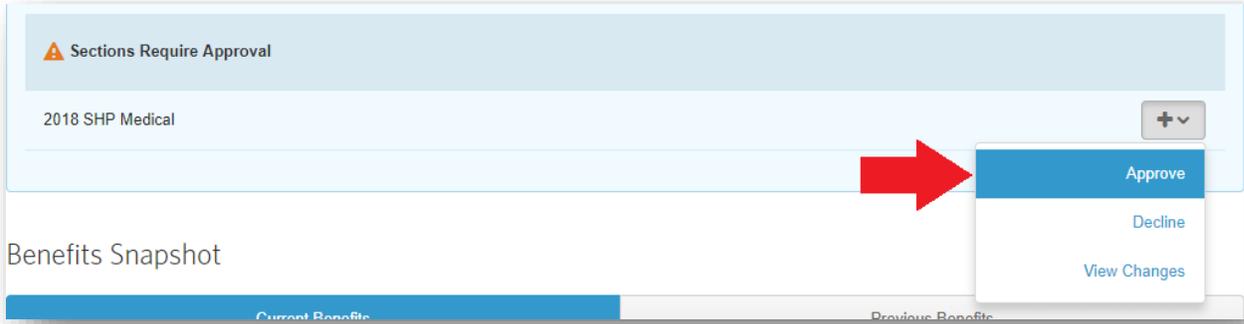
2018 SHP Medical

You may edit this benefit by clicking on the section's corresponding Edit button.

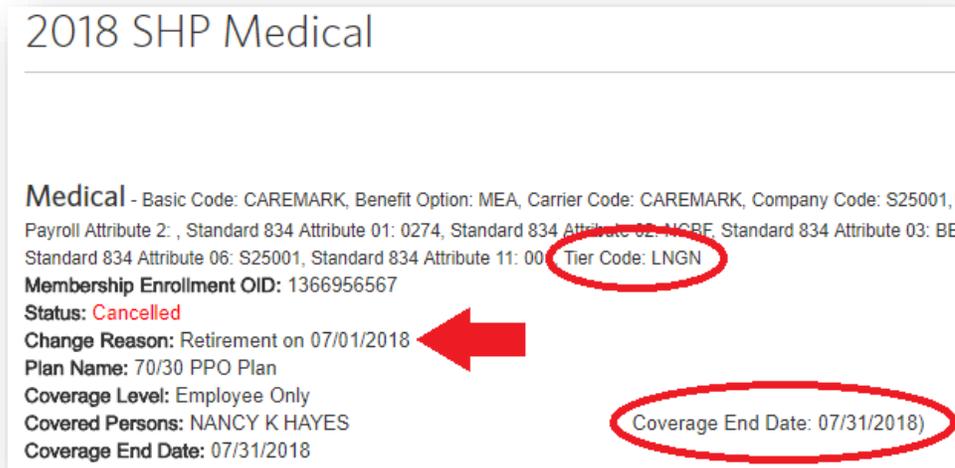
Change Reason	Retirement on 07/01/2018
Medical	Cancelled
Medicare	Medicare Number: Hospital Insurance (Part A) Effective: 07/01/2014 Medical Insurance (Part B) Effective: 07/01/2018 Covered: HAYES, NANCY R
	Medicare Primacy date and Part B effective date a Please click edit to see full details of the policy.
End Date	07/31/2018



14. If pending task populates - (this ensures the member's cancellation of benefits send to BCBSNC on the next daily file)

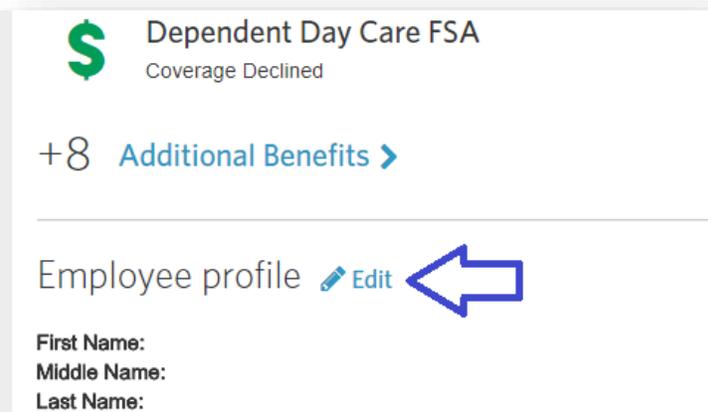


15. Member should reflect the appropriate Medicare Primary tier code



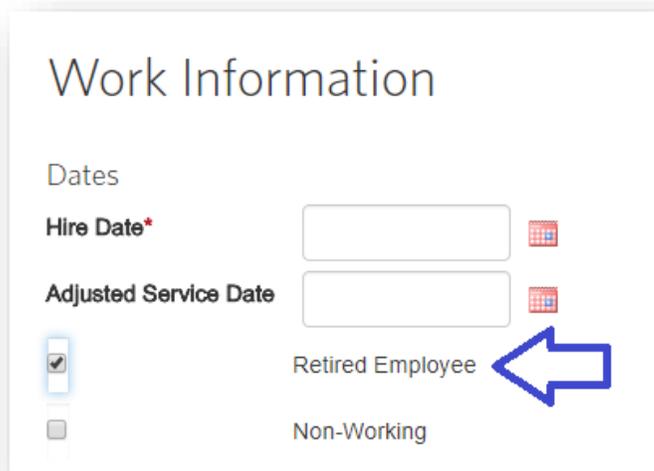
If keying retirement less than 30 days in advance, for Medicare Eligible Employee:

1. Open member's record in the eBenefits platform
2. Click blue 'Edit' button next to Employee profile section



The screenshot shows a section titled "Dependent Day Care FSA" with a green dollar sign icon and the text "Coverage Declined". Below this is a link "+8 Additional Benefits >". A horizontal line separates this from the "Employee profile" section, which includes a blue pencil icon and the word "Edit" next to the text "Employee profile". A blue arrow points to the "Edit" button. Below the "Employee profile" section are three labels: "First Name:", "Middle Name:", and "Last Name:".

3. Scroll down to 'Work Information' section of employee's profile, and select 'Retired Employee' box



The screenshot shows the "Work Information" section. It has a heading "Work Information" and a sub-heading "Dates". There are two date input fields: "Hire Date*" and "Adjusted Service Date", each with a calendar icon to its right. Below the date fields are two radio button options: "Retired Employee" (which is selected and highlighted with a blue arrow) and "Non-Working".

4. Identifying the member as 'Retired', will prompt the Manage Medicare page, and require the Medicare fields to be filled out.
5. Click the *Edit* button for the member's Medicare policy


Edit Delete

Medicare Number: 271110000-A
 Hospital Insurance (Part A) Effective: 09/01/2014
 Medical Insurance (Part B) Effective:

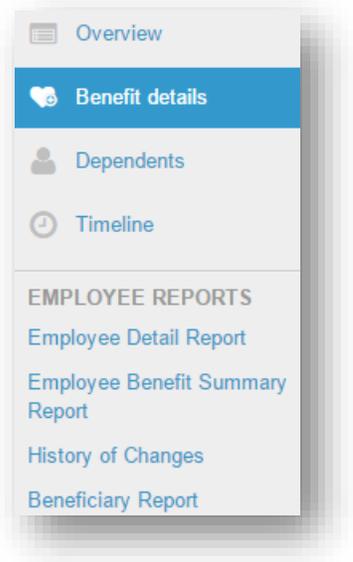
Is Medicare "Primary" or "Secondary"?	Start Date	End Date
Secondary	09/01/2014	

6. Select Primary from the available dropdown menu
7. Enter the effective date for the member to move to Medicare Primary status (This is first of the month, of the retirement)
 - a. **IMPORTANT:** This date will be the first day of the last month of coverage with the active agency (i.e. Last month of coverage is February 2015, date entered should be 2/1/15)
8. Click Add

Is Medicare "Primary" or "Secondary"?			
Is Medicare "Primary" or "Secondary"?	Effective Date	Expiration Date	
Secondary	09/01/2014 		Delete
<input type="text" value="Primary"/> 	02/01/2015 	<input type="text"/>	Add 

9. Click Update at the bottom of the next page
10. Repeat steps 4-8 for any other Medicare eligible dependents.
 - a. If no dependents are Medicare eligible, proceed to step 10
11. Click Save
12. If prompted, approve Pending Task(s) generated from updating Medicare to primary

13. Click on the *Benefit Details* link on the left side of the screen



14. Click on the *Edit* button for the SHP Medical Section

15. Click on the *Cancel Benefits for All* button



16. Select **Retirement** as the reason for medical change

17. Click Next

18. Select *Yes* to indicate that you wish to continue with this change

19. Select 'Yes' to continue with change, and fill out date fields with appropriate coordinating dates:
- Enter last date employee qualifies for coverage = effective date of retirement (i.e. 07/01/2018)
 - When were you notified about this life event = this should be the date notified about Retirement; this can sometimes be first day of the last month of employment

This date can be in advance, as there is no restriction on how far in advance you are keying the Retirement life event

***Reason for Change**
You have selected a Retirement change reason.

You are permitted to perform the following adjustments to your insurance coverage as a result of this life event:

- You can cancel your coverage.
- You are NOT permitted to change your plan.
- You may change your coverage level.
- You CANNOT add any family members to your existing coverage.
- You can cancel coverage for any dependent.

Do you wish to continue with this change?

Yes
 No

If yes, please enter the following:

Enter last date employee qualifies for coverage*

When were you notified about this life event?*

20. Click Next

21. Confirm that the correct Benefit End Date is populated

22. Click Next

23. Review Details to confirm appropriate data is reflected

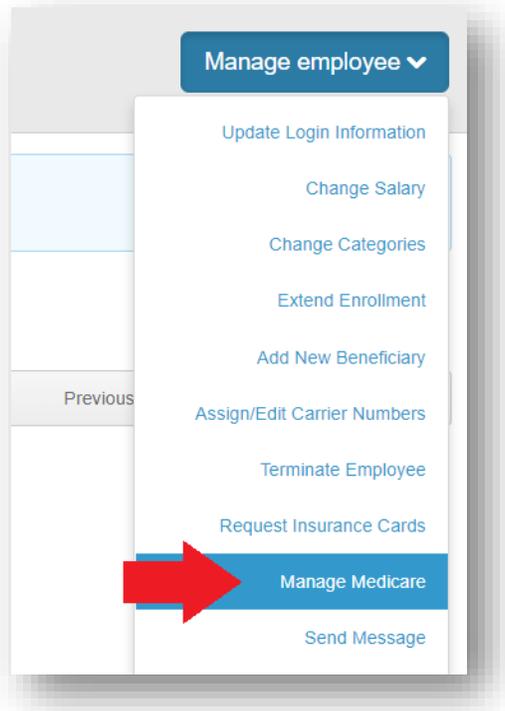
24. Click Save

25. Approve Task(s) – if prompted

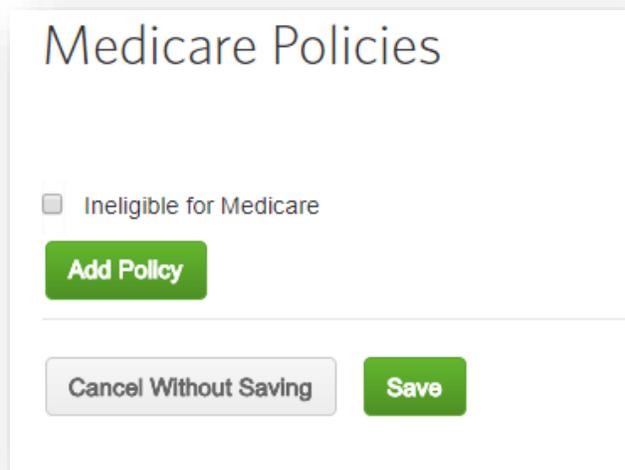
26. Allow payroll process to terminate member and all ancillary benefits in accordance with standard payroll process

Keying Retirement for members under 65, not Medicare eligible:

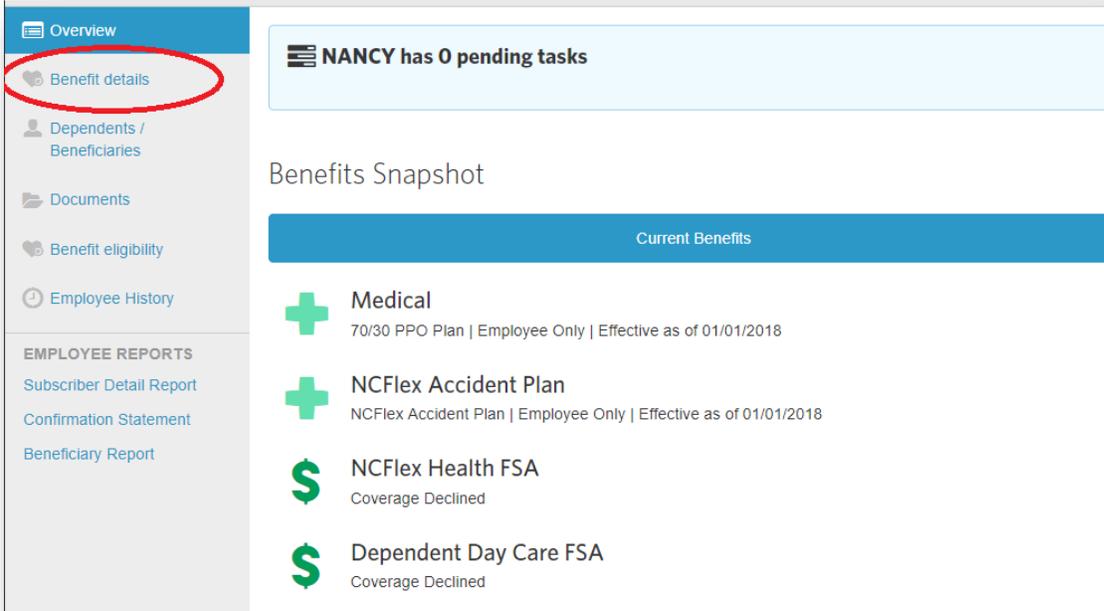
1. Open member's profile in eBenefits platform
2. To validate Medicare status
 - Click 'Manage Employee' button on top right corner
 - Select 'Manage Medicare'



- Manage Medicare should populate with no Medicare status available



3. Click 'Benefit Detail' tab on the left



Overview

Benefit details

Dependents / Beneficiaries

Documents

Benefit eligibility

Employee History

EMPLOYEE REPORTS

Subscriber Detail Report

Confirmation Statement

Beneficiary Report

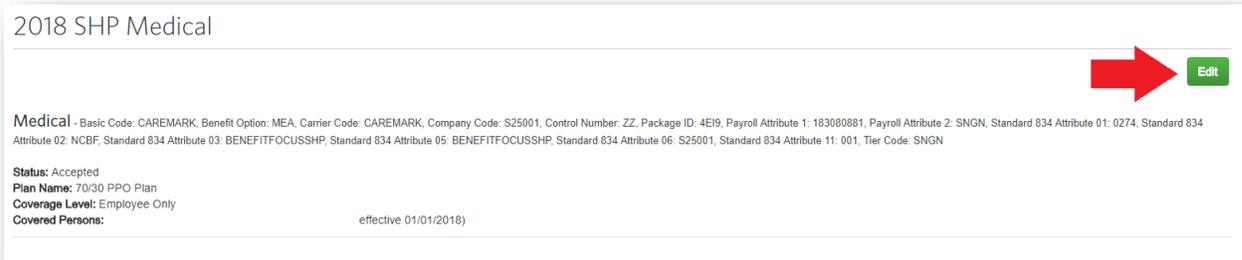
NANCY has 0 pending tasks

Benefits Snapshot

Current Benefits

- Medical**
70/30 PPO Plan | Employee Only | Effective as of 01/01/2018
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NCFlex Accident Plan | Employee Only | Effective as of 01/01/2018
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Coverage Declined
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Coverage Declined

4. Select 'Edit' button next to active Medical enrollment



2018 SHP Medical

Medical - Basic Code: CAREMARK, Benefit Option: MEA, Carrier Code: CAREMARK, Company Code: S25001, Control Number: ZZ, Package ID: 4E19, Payroll Attribute 1: 183080881, Payroll Attribute 2: SNGN, Standard 834 Attribute 01: 0274, Standard 834 Attribute 02: NCBF, Standard 834 Attribute 03: BENEFITFOCUSHP, Standard 834 Attribute 05: BENEFITFOCUSHP, Standard 834 Attribute 06: S25001, Standard 834 Attribute 11: 001, Tier Code: SNGN

Status: Accepted
Plan Name: 70/30 PPO Plan
Coverage Level: Employee Only
Covered Persons: effective 01/01/2018

Edit

- 5. Select 'Cancel Benefits for All'

Current Benefits

2018 SHP Medical

Changes Requiring a Change Reason

Medical Accepted

Plan 70/30 PPO Plan

Coverage Level Employee Only

Persons Covered

Name	Relationship
NANCY K HAYES	Subscriber
	Member ID: :
	Alternate ID:

To edit a person's Name or SSN, click the person's name.

[Edit due to Change Reason](#) [Cancel Benefits for All](#)

6. Cancel Member's benefits due to life event 'Retirement'

Current Benefits
2018 SHP Medical

Reason for Medical Change

You have selected to cancel the entire benefit and these are

- Retirement
- Select a new change reason--
- Death of employee
- Employee reaches age 65
- FMLA Nonpay (Dependent)
- FMLA Subscriber Nonpay (Employee)
- FMLA Subscriber Requested Cancellation
- Former Legislator
- Leave of Absence
- Loss of coverage due to non-payment
- Military Leave
- Now eligible for other coverage
- Reduction in Force
- Reduction of hours
- Retirement

Export Details

7. Click 'Next'

Current Benefits
2018 SHP Medical

Reason for Medical Change

You have selected to cancel the entire benefit and th

- Retirement
- Other (Correction, etc.)

Cancel Next

8. Select 'Yes' to continue with change, and fill out date fields with appropriate coordinating dates:
 - Enter last date employee qualifies for coverage = effective date of retirement (i.e. 07/01/2018)
 - When were you notified about this life event = this should be the date notified about Retirement; this can sometimes be first day of the last month of employment

Please note: The first date is what triggers the end date of benefits

9. Click 'Next'

You can cancel coverage for any dependent.

Do you wish to continue with this change?

Yes

No

If yes, please enter the following:

Enter last date employee qualifies for coverage* 

When were you notified about this life event?* 



10. Click 'Next'

Current Benefits

2018 SHP Medical

Reason for Change	Retirement on 07/01/2018
Medical	Cancelled

End Date

Enter an end date.* 

Where Did This Date Come From? Non-Production Feature
show details...



11. Click 'Save'

Current Benefits

2018 SHP Medical

You may edit this benefit by clicking on the section's corresponding Edit button.

Change Reason	Retirement on 07/01/2018
Medical	Cancelled
Medicare	None
End Date	07/31/2018

[Cancel without Saving](#) [Save](#) [Go to Benefits](#)



12. If task populates – approve pending task(s) (this ensures the member's cancellation of benefits send to BCBSNC on the next daily file)

Sections Require Approval

2018 SHP Medical +

[Approve](#)

[Decline](#)

[View Changes](#)

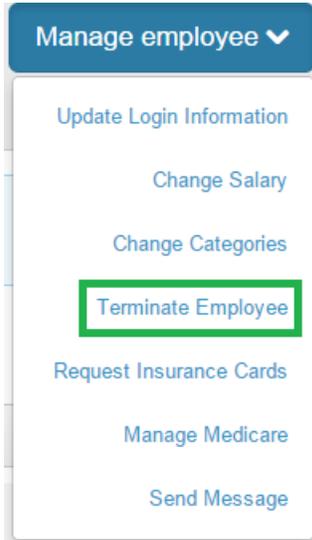
Benefits Snapshot

Current Benefits Previous Benefits



Non-Payroll Groups (everything is Manual)

1. Open member's record in the eBenefits platform
2. Click on the Manage Employee dropdown menu



3. Select Terminate Employee from the dropdown menu
4. Enter the first day of the employee's last month of coverage as the termination date (i.e. Employee's termination date is 1/27/15 but their last month of active coverage is February 2015, termination date should be 2/1/2015)

Dates

*Employment Termination Date 

5. Select Yes to disable the employee's login

Login

*Do you wish to disable the employee's login? Yes No

6. Select the termination reason of Retirement (Not COBRA Eligible)
 - a. IMPORTANT: Only Select Retirement (COBRA Eligible) if the employee will not be moving to the State Retirement System

Termination Reason

What is the reason for termination?*

Retirement (Not COBRA Eligible) ▼

7. The workflow at this point will be determined by the existence of a Medicare Policy for this member:
 - a. If the member has an existing Medicare Policy in eBenefits you will see a “Next” button. Proceed to step 8 to update the Medicare policy.
 - b. If the member does not have a Medicare Policy in eBenefits you will see a “Save” button. Proceed to step 14 to complete the retirement process.
 - c. If you believe the member *should* have a Medicare policy and you see a “Save” button, instead click Cancel and refer to steps 2 through 11 in the “Payroll Groups” section above to correctly populate the Medicare policy prior to performing the retirement.
8. Click Next
9. Confirm that the Benefit Cancellation Date(s) are reflected properly
10. Click Next
11. If only one family member has a Medicare policy you will be presented with the member’s Medicare Policy. Confirm that the member’s Medicare Primary status has an effective date that is the first day of the last month of coverage (i.e. Employee’s last month of coverage is February 2015, Medicare Primary status should have an effective date of 2/1/2015).
12. Click Update
13. Review Medicare details and confirm that Primary is effective the first day of the last month of coverage. If multiple family members have a Medicare Policy you will be presented with this overview page showing the updates to be made.
14. If all updates are correct, click Save.
15. Confirm the employee’s benefits now reflect the appropriate cancellation date
16. Confirm the employee’s employment status is now reflected as terminated
17. Approve Pending Tasks