

Processing Retirement in ACCESS

1

Participant Search and Edit Participant

- Participant Search
- Edit Participant
- Transaction date: Last day worked
- Organization: Agency Name

NEXT

2

Verify Employee and Employment Information

- Name, Address, Email Address and Phone Number
- Employment Information
 - Employment Status: Terminated
 - Termination Reason: Retired/Elects to Continue (If electing coverage)

3

Complete Employee Additional Information

Complete all fields that apply to the Employee

- Only Enter the Years of Service for Employee not participating with the WV Consolidated Retirement Board.
- Leave Credit Election: Enter Days not months.
- Higher Education: Select the Higher Ed Indicator
Higher Education Leave Credit: Enter the Years of Service in Months. IE: 2 years is 24 months
- Ext. Leave Benefits: Make Selection (Years of Service or Insurance Premiums)
- **Member of TIAA Cef:** Select Yes or No

NEXT

- This will create a Retirement Event to select Coverage
- If you select Retired: Elected not to continue you will not see the pop up for the Event.

4

In the Event you will make the Retirement Coverage Elections. .

- **Basic Life:** Coverage or No Coverage
- **Optional Life:** No Coverage or the Coverage Election Amount
- **Dependent Life:** No Coverage or the Coverage Election amount

You will need to select each Dependent you wish to be covered on the Dependent Life insurance.

5

Health Insurance: Select the Plan. It will only show the Plan you are currently eligible for.

- You will need you select each Dependent that should be covered.

6

Complete the Tobacco Adivavit

- If the Employee is using Leave Credit for Insurance: Choose Apply to Benefits

DONE

7

Participant Work Flow

- Click the Enrollment w/ "in progress status"
- Tasks
- Pending
 - Select: Benefit Admin Review
 - Select: Approve or Reject
 - Complete Task

The Retirement Enrollment will then come to PEIA for Final Approval.