

# HOW TO: BENEFITS DEFERMENT

Here is a handy guide to help as you make benefit terminations that extend beyond the last day of employment.

## THE STEPS

### EDIT THE PROFILE

We'll start by updating the employee's status to **Terminated**. We'll also add in our **Termination Type** and **Reason for Status Change** so we can refer back to it later. This is also where we will set the **Final Payroll Date**, if needed, and the **System Access Expiration Date** if there is a date prior to their termination date that the employee should no longer be able to login to **THEbenefitsHUB**.

**Note:** This step should not be done more than 60 days in advance of their last day worked.



### EDIT THE BENEFITS

This is the part where the deferment comes in! Most rules utilize the last day of their terminated month for when their coverage should end, but we'll need to update the dates for any benefits that the employee plans to keep until the end of their contract date.

### EDIT THE JOURNAL

As always, we're going to add our journal entry so it is available to refer back to later. **THEbenefitsHUB** will auto-populate some information in the **Notes** section based on changes that were made, but feel free to add more!



## EXTRA TIPS



### MAKING OTHER CHANGES?

Before changing an employee to COBRA or Retired, we recommend waiting for a round of EDI Export Files to send to help ensure that the termination will be correctly processed by the carriers. If you're not sure if one has delivered, check your Export Summary or EDI File Viewer to review the delivery dates!

### DUAL COVERAGE CAUTION

TRS does not allow for dual coverage. It's a good idea to make sure that employees are well-informed about when their benefits end in the event that they are changing districts and picking up coverage there.

