

Long Term Disability Retiree (Terminated from HRE)

An employee who has been terminated in HRE, is receiving Long Term Disability benefits, and retires from Long Term Disability may be entitled to the state paid insurance benefit (according to the benefit available to active retirees upon retirement). The steps for creating an **Automated Retirement Worksheet (HB213) Part II** are outlined below.

- 1) Complete the 'Retirement Worksheet Part I - HB213 Employee Sick Leave Benefit Estimate' spreadsheet.

__ Input the retiree's Leave Balances into the 'Current YTD Amount' column for each applicable category listed.

__ Estimate the compensation the participant would have received for the year if the participant was paid at the rate of compensation paid immediately before becoming permanently and totally disabled. (*LTD payments made to the employee are a benefit and do not count toward gross earnings on the Retirement Worksheet Part I.*)

Estimate the **number of hours the employee would have worked**
(as if they had been working and had not been on LTD): _____

Multiply the **hours by the number of pay periods in the year**
(up to the pay period prior to the final payday) x _____

Sub Total: _____

Multiply by the **rate of pay the employee had at termination** x _____

Total: (*Input in the **Gross Pay Current YTD Amount** field*) = _____

- 2) Update the HRE Termination action to reflect the employee's retirement from LTD. Include the following comments: Retirement from LTD, retirement date, hourly rate (at termination), last day paid, last day worked, leave balances, leave payout information, insurance coverage dates, and any other pertinent information.

- 3) Create the **Automated Retirement Worksheet (HB213) Part II**. (This must be done even if the employee does not have any Program I Sick or Converted Sick leave.) You should be able to add a 'New' worksheet for the employee as long as they were terminated from the HR system within the last 18 months.

If you cannot add a 'New' worksheet for the employee, proceed as follows:

A. Identify an active employee that is in the same org key that the terminated LTD employee was in. (*If that org key no longer exists, create a worksheet for an active employee that is housed in an org key that has the FINET coding that you want used for the LTD employee.*)

B. Create the **Automated Retirement Worksheet (HB213) Part II** for the active employee. (This is necessary to get the information for the 'Division' field. The worksheet you create for the active employee will be deleted as soon as the worksheet for the LTD employee is created.)

C. Email the following information to Crisanta Gwilliam cgwilliam@utah.gov

__ Name and EIN (for the active employee used)

__ Name, EIN, Hourly Rate and Retirement Year (for the employee retiring from LTD)

- 4) You will be notified as soon as the **Automated Retirement Worksheet (HB 213) Part II** has been created for the LTD employee. At which time you will need to update the worksheet for the employee retiring from LTD as follows:

__ **Last Day Actually Worked** (*Enter the actual last day worked*)

__ **Last Day Paid** (*Enter the last day the employee was paid*)

__ **Date of Final Ins. Deduction** (*Enter the date the LTD insurance coverage ends, the state paid insurance begins when the LTD benefit ends*)

__ **Complete Section III - Insurance and Dependent Information for Retiree, Spouse and Dependents**
(*It may be necessary for you to contact PEHP for this information*)

__ **Comments** (*i.e., EE is retiring from LTD, if the employee does not have any Pre06 Sick and/or Converted Sick leave balances indicate that*). Click the **Update** button so the comments will be update to the worksheet.)

__ Add the '**Signed by Person Completing the Form**' and '**Signed by Applicant**' eSignatures. (*The terminated employee will not have UMD access to e-Sign the worksheet.*)

- 5) Once the **Automated Retirement Worksheet (HB 213) Part II** is complete, signed and ready for the Finance Review and eSignature, send an Email to State Payroll: payroll@utah.gov with the 'Retirement Worksheet Part I - HB213 Employee Sick Leave Benefit Estimate' spreadsheet included as an attachment.