

# Preparation checklist

## for remittance changes to QuickLink/Trust Advantage

School districts using Excel

What's happening?	What you need to do
<p><b>Auto, home, and umbrella insurance</b></p> <p>Payroll deductions will discontinue when the current policy expires.</p> <p>We have/will contact participating employees at least 50 days before their expiration date to make future payment arrangements. We offer SmartPlan, which is a monthly debit from a checking or savings account.</p>	<p>Continue to send us remittance files at <a href="https://weabenefits.com/secure/quicklink">weabenefits.com/secure/quicklink</a>. As policies expire, remove the deduction code from the pay record. Once your remittance file no longer contains records, you can stop sending the remittance file.</p>
<p><b>IRA</b></p> <p>Payroll deductions discontinue by April 4.</p> <p>We sent a letter to participating employees in December/January to contact us for alternative contribution methods. We offer SmartPlan, which is a monthly debit from a checking or savings account.</p> <p>As we make that change, we'll email you to stop that employee's IRA deduction.</p>	<p>Submit your remittance files with IRA products at <a href="https://weabenefits.com/secure/quicklink">weabenefits.com/secure/quicklink</a> <b>before April 4</b> to draw before April 8. On April 4, we will no longer accept remittance files with IRA deductions.</p> <p>After your last remittance file with IRAs is submitted at <a href="https://weabenefits.com/secure/quicklink">weabenefits.com/secure/quicklink</a>, remove IRA deduction codes from the employee's pay records.</p>
<p><b>403(b)</b></p> <p>These will continue to be deducted but remitted via another method and site.</p> <p>You will continue to take deductions as usual and your employees should not notice any changes.</p> <p>Around March 12, you will receive a separate communication on how to submit the 403(b) deductions on the new site starting on April 14.</p>	<p>Submit your remittance files with 403(b) products at <a href="https://weabenefits.com/secure/quicklink">weabenefits.com/secure/quicklink</a> <b>before April 4</b> to draw before April 8. On April 4, we will no longer accept remittance files with 403(b) deductions on this site.</p> <p><b>Between April 4-13, you will be unable to submit 403(b) remittances;</b> the new site will be available on April 14. Please see <a href="https://weabenefits.com/yourplanaccess-upgrade">weabenefits.com/yourplanaccess-upgrade</a> for more information.</p>

Need assistance?

- For questions on the above steps: Jessica Pape at 1-800-279-4030, Extension 1101 or [jpape@weabenefits.com](mailto:jpape@weabenefits.com).
- For questions on submitting 403(b) remittances: Kellie Jo Roesslein at 1-800-279-4030, Extension 2032 or [kroesslein@weabenefits.com](mailto: kroesslein@weabenefits.com).
- More information can be found at [weabenefits.com/yourplanaccess-upgrade](https://weabenefits.com/yourplanaccess-upgrade).