

Preparation checklist

for remittance changes to QuickLink/Trust Advantage

School districts using Skyward PaC/SMS

What's happening?	What you need to do
<p>Auto, home, and umbrella insurance</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 download billing files and send us remittance files at weabenefits.com/secure/quicklink until your remittance file no longer contains records, which may be into the summer/fall.</p>
<p>IRA</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 your employees move to a different method, we'll add a record to your billing file to stop that employee's IRA deduction.</p>	<p>Submit your remittance files with IRA products at weabenefits.com/secure/quicklink before April 4 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 weabenefits.com/secure/quicklink:</p> <ol style="list-style-type: none"> 1. Go to the Trust Advantage interface screen in Skyward PaC (Human Resources, Payroll, Reporting, Master Files). 2. In the "Employee Summary" section of the screen, delete anyone with a line of business of 800002 or 800003. 3. Click the Line of Business button in the upper left corner. 4. Edit the entries for 800002 and 800003 and look at the associated deduction code. 5. Delete the Line of Business entries for 800002 and 800003, which will stop them from generating on the remittance file going forward. 6. Using the deduction codes from #4 above, remove these codes from the employees' pay records.
<p>403(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 weabenefits.com/secure/quicklink before April 4 to draw before April 8. On April 4, we will no longer accept remittance files with 403(b) deductions on this site.</p> <p>After your last remittance file with 403(b) is submitted at weabenefits.com/secure/quicklink:</p> <ol style="list-style-type: none"> 1. Go to the Trust Advantage interface screen in Skyward PaC (Human Resources, Payroll, Reporting, Master Files). 2. Click the Line of Business button in the upper left corner. 3. Delete entries with codes 800011-800103, which will stop them from generating on the remittance file going forward. 4. Between April 4-13, you will be unable to submit 403(b) remittances; the new site will be available on April 14. Please see weabenefits.com/yourplanaccess-upgrade for more information.

Need assistance?

- For questions on the above steps: Jessica Pape at 1-800-279-4030, Extension 1101 or jpape@weabenefits.com.
- For questions on submitting 403(b) remittances: Kellie Jo Roeslein 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.