

Preparation checklist

for remittance changes to QuickLink/Trust Advantage

School districts using Skyward Qmlativ

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 send us remittance files at weabenefits.com/secure/quicklink. 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>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 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 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. In Qmlativ, look at the entries for lines of business 800002 and 800003 in the "special screen" and their associated deduction codes. 2. Remove the deduction codes from the employee's pay records that are using these deduction codes. 3. Remove the entries for 800002 and 800003 in the "special screen."
<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. In Qmlativ, remove entries for employees in the "special screen" for line of business codes 800011-800103. Also remove from any set up screens particular for this remittance process. 2. 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 Roesslein at 1-800-279-4030, Extension 2032 or kroesslein@weabenefits.com.
- More information can be found at weabenefits.com/yourplanaccess-upgrade.