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RETIREE HEALTH PROCEDURES (RSK-P002)  
SACRAMENTO CITY UNIFIED SCHOOL DISTRICT

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**1.0 SCOPE:**

- 1.1 This procedure describes the process in which the benefit department processes health benefits for a new retiree or current retiree.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

**2.0 RESPONSIBILITY:**

- 2.1 Employee Benefits Technician

**3.0 APPROVAL AUTHORITY:**

- 3.1 Director of Risk Management

*Marianne Clemens*  
\_\_\_\_\_  
Signature

4/6/2009  
\_\_\_\_\_  
Date

**4.0 DEFINITIONS:**

- 4.1 CALPERS/PERS –Public Employee Retirement System
- 4.2 STRS – Sacramento Teachers Retirement System
- 4.3 Eligible Dependent – legal spouse, natural children, adopted children, step-children
- 4.4 ESCAPE – District fiscal and personnel computer system
- 4.5 BMI – Scanning System
- 4.6 VBAS – Benefit Management System

**5.0 PROCEDURE: NEW RETIREES**

- 5.1 Member comes in to Benefits Office indicating retirement or Benefit Technician may be notified by personnel or payroll.
- 5.2 Benefit Technician determines retiree benefit eligibility based on bargaining unit agreement and data from personnel office and ESCAPE back sheet which may include years of service, age at retirement, date of hire and break in service. Benefit Technician gives employee correct information packet and forms for medical, dental, vision and life.
- 5.3 Retiree is advised that at age 65, retiree must enroll in Medicare benefits through Social Security if eligible. Medicare Part A is earned. Everyone is eligible to purchase Medicare Part B. Member must provide a Medicare card if over 65 and show written proof from Social Security office if not eligible for Medicare Part A.
- 5.4 Benefit Technician assists retiree with completion of forms and answers employee questions. Member selects out of pocket premium options (Dental, Vision, Life and eligible dependent medical coverage). Technician informs retiree of estimated benefit cost.
- 5.5 Benefit Technician receives completed forms from the retiree and adds the effective dates and appropriate group numbers as required.
- 5.6 Benefit Technician obtains Director's authorization signature on Form RSK – F002A.
- 5.7 Benefit Technician forwards completed forms to the appropriate insurance carrier for Medicare Plans only and enters data in VBAS. Correct forms are submitted for STRS or PERS retirement system deductions.

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- 5.8 Benefit technician enters appropriate data and sets up retiree pay cycle and reimbursement in ESCAPE and VBAS.
- 5.9 Benefit technician scans documents into the district document system (BMI). Hardcopies are filed.

**6.0 PROCEDURE: CURRENT RETIREES**

- 6.1 Current Retirees may only make changes in their health benefits during a qualifying event as defined by the health carriers or during Open Enrollment.
- 6.2 Benefit Technician assists retiree with completion of forms and answers questions. Technician informs retiree of estimated benefit cost.
- 6.3 Benefit Technician receives completed forms from the retiree and adds the effective dates and appropriate group numbers as required.
- 6.4 Benefit Technician forwards completed forms to the appropriate insurance carrier or enters data in ESCAPE and VBAS. Correct forms are submitted for STRS or PERS retirement system deductions.
- 6.5 Benefit technician enters appropriate data and sets up reimbursement in ESCAPE and VBAS.
- 6.6 Benefit technician scans documents into BMI. Hardcopies are filed.

**7.0 ASSOCIATED DOCUMENTS:**

- 7.1 CalPERS Forms – external documents
  - 7.1.1 PERS-HBD-86 for CalSTRS members
  - 7.1.2 PERS- AESD-1 Appointment Status
  - 7.1.3 PERS-PRS-346 Direct Authorization Deduction Request
    - 7.1.3.1 A01095 Dental
    - 7.1.3.2 A11182 Life
    - 7.1.3.3 A01022 Vision
    - 7.1.3.4 A01023 Health Net EW
    - 7.1.3.5 A01020 Kaiser
- 7.2 CalSTRS Forms – external document
  - 7.2.1 D445 Health Plan or Option Deduction Form
    - 7.2.1.1 507240 Dental
    - 7.2.1.2 507245 Life
    - 7.2.1.3 507230 Vision
    - 7.2.1.4 507070 Health Net EW

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7.2.1.5 507060 Kaiser

7.2.2 STRS MS 0556 Insurance Premium Deduction Authorization form

7.3 BRMS SCUSD Retiree Reimbursement Direct Deposit Form- external document

7.4 Medicare Card issued by Social Security Office - external document

7.5 Union Contracts – external documents

7.6 RSK – F002A Retiree Health Form

7.7 PSL – F008 Resignation Retirement Form from Personnel

**8.0 RECORD RETENTION TABLE:**

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Members' back sheets and/or salary cards	Scanning	One year, then goes to warehouse	After 5 years shredded	Scanning is pass code protected
Members Retiree enrollment forms	Scanning	One year, then goes to warehouse	After 5 years shredded	Scanning is pass code protected
Members forms indicating deletion of dep	Scanning	One year, then goes to warehouse	After 5 years shredded	Scanning is pass code protected
STRS & Pers deduction form	Scanning	One year, then goes to warehouse	After 5 years shredded	Scanning is pass code protected

**8.0 REVISION HISTORY:**

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
11/8/04	A	Revised per audit input to be less detailed
7/12/06	B	Revised to include VBAS procedure
4/3/08	C	Accidentally deleted from the web site
4/6/09	D	Update to reflect current process and forms

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