



Name and/or Address Change Procedure (BEN-P001)

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

1.0 SCOPE:

1.1 This procedure describes the process used by the Risk Management Office to make name and address changes for employees at the Washoe County School District.

2.0 RESPONSIBILITY:

2.1 Risk Manager

3.0 APPROVAL AUTHORITY:

3.1 Benefits Coordinator

(Approval signature on file)

4.0 DEFINITIONS:

Signature _____

Date _____

4.1 TPA – Third Party Administrator

5.0 PROCEDURE:

5.1 Risk Management is in receipt of a Change of Name and/or Address Form (HR-F535).

5.2 The form is date stamped.

5.3 The Risk Management Secretary / Receptionist makes copies for the Group Health TPA and Human Resources and forwards. If the change is for a member on the Health Maintenance Plan, a copy is also forwarded to Health Maintenance Plan TPA.

5.3.1 File folder is updated with the new name change and re-filed.

5.3.2 If the change is for an address change, the Risk Management Secretary / Receptionist will follow the above steps except 5.3.1.

5.4 The original form (HR-F535) is filed in the employee’s personnel file.

6.0 ASSOCIATED DOCUMENTS:

6.1 Change of Name and/or Address Form (HR-F535)

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Change of Name and/or Address Form	(1) copy to Human Resources Personnel File and (1) copy for Group Health TPA	6 years after coverage ends	Discard as desired	Standard file cabinet in secured office

Washoe County School District

Name and/or Address Change Procedure (BEN-P001)

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
6/2/05	A	Initial release
5/15/07	B	Re-identified department name as "Risk Management" in 1.1; identified form number in 5.1 and 6.1; added "Management" to title of secretary in 5.3 and 5.3.2; updated Record Retention Table.
04/27/09	C	3.1 changed "Risk Management Senior Technician" to "Benefits Coordinator"; 5.3.1 replaced "changed" with "updated" and deleted period after "change," made "And" lower-case and joined sentences; 5.3.2 added "except 5.3.1" to end of sentence.

***** End of procedure *****