



## Benefit Change for Retirees Procedure (BEN-P002)

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 in which the Risk Management Office uses to change an employee record from active to retired status at the Washoe County School District.

### 2.0 RESPONSIBILITY:

- 2.1 Risk Manager

### 3.0 APPROVAL AUTHORITY:

*(Approval signature on file)*

- 3.1 Benefits Coordinator

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

### 4.0 DEFINITIONS:

- 4.1 CDS – CDS Group Health Third Party Administrator
- 4.2 HH – Hometown Health Third Party Administrator
- 4.3 PERS – Public Employees Retirement System

### 5.0 PROCEDURE:

- 5.1 Risk Management is in receipt of the Employee Insurance Eligibility Form (HR-F538) or the Insurance Eligibility webform initiated by Human Resources.
- 5.2 The form is date stamped.
- 5.3 The Risk Management Technician updates the benefit information in the financial software system.
  - 5.3.1 If the employee has not requested insurance continuation, the Risk Management Technician enters data into CDS database and forwards to HH if applicable.
  - 5.3.2 If the employee has requested continuation of coverage, the Risk Management Technician has the employee complete the appropriate Retiree Insurance Premium Deduction/Change Form (BEN-F002 or BEN-F003).
    - 5.3.2.1 Copy of the form is given to the employee and entered into the database and HH if applicable.
    - 5.3.2.2 Copy of the form is given to the Risk Management Technician who notifies PERS and enters information into the Retiree Database.
  - 5.3.3 File is marked with a blue dot, signifying retiree and returned to the Active Insurance File Cabinet.

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**WASHOE COUNTY SCHOOL DISTRICT**  
**Benefit Change for Retirees**  
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**6.0 ASSOCIATED DOCUMENTS:**

- 6.1 Employee Insurance Eligibility Form (HR-F538)
- 6.2 Retiree Insurance Premium Deduction/Change Subsidy Eligible Form (BEN-F002)
- 6.3 Retiree Insurance Premium Deduction/Change Non-Subsidy Eligible Form (BEN-F003)

**7.0 RECORD RETENTION TABLE:**

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Employee Eligibility Insurance Form	Active Insurance File Cabinet	6 years from loss of coverage	Discard as desired	Standard file cabinet in secure office
Retiree Insurance Premium Deduction/Change Subsidy Eligible Form	Active Insurance File Cabinet	6 years from loss of coverage	Discard as desired	Standard file cabinet in secure office
Retiree Insurance Premium Deduction/Change Non-Subsidy Eligible Form	Active Insurance File Cabinet	6 years from loss of coverage	Discard as desired	Standard file cabinet in secure office

**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 as "Risk Management" in 1.1; redefined 4.1, 4.2, and 4.3; added "Management" to title identification in 5.3, 5.3.1, 5.3.2, and 5.3.2.2; identified form numbers in 5.3.2 and 6.1; updated Record Retention Table.
05/05/09	C	3.1 replaced "Risk Management Senior Technician" with "Benefits Coordinator"; 5.1 added "or the Insurance Eligibility webform initiated by" after "(HR-F538)"; 5.3 replaced "Bi-Tech" with "financial software."

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