



PERS Notice of Rate Change Procedure (BEN-P003)

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 makes retiree benefit 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)

Signature

Date

4.0 DEFINITIONS:

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

5.0 PROCEDURE:

Individual Change

- 5.1 A retiree wishing to make an individual change to their coverage:
 - 5.1.1 completes the Enrollment Change Form (BEN-F001)
 - 5.1.1.1 for adding or removing a dependent
 - 5.1.1.2 for adding or removing coverage
 - 5.1.2 or the retiree can submit a letter to Risk Management requesting the change and include their signature and social security number.
- 5.2 The letter and/or Enrollment Change Form is date stamped.
- 5.3 The technician makes copies and updates the CDS System and forwards to HH if applicable.
- 5.4 The Technician gives the form or letter to the technician handling retiree changes.
 - 5.4.1 Updates retiree database which gives new rate.
 - 5.4.1.1 PERS is notified by e-mail of the new rate to be deducted from PERS check of the retiree.
 - 5.4.1.2 If the retiree does not have PERS deduction, the retiree is notified of the new rate.

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5.4.2 The Enrollment Change Form or letter is filed in retiree file.

Life Insurance Change

5.5 Risk Management sorts database for when a retiree turns age 70, on a monthly basis.

5.5.1 A list of affected retirees is forwarded to the technician handling retiree change.

5.5.1.1 Follow steps 5.4.1 through 5.4.1.2 above.

5.5.2 A copy of the list is filed in each individual retiree file.

Mass Retiree Rate Change

5.6 Rate system in the retiree database is changed due to Board of Trustees' approval.

5.6.1 If retiree is PERS deduction, the change is sent via e-mail to PERS.

5.6.2 If not PERS, a letter is sent to affected retirees notifying of new rate.

6.0 ASSOCIATED DOCUMENTS:

6.1 Enrollment Change Form (BEN-F001)

6.2 List of Age 70 Employees

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
List of age 70 employees	Employee Files	7 years after coverage ends	Discard as desired	Locked office
Enrollment Change Form	Risk Management Files	6 years	Discard as desired	Standard file cabinet in secured 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; added "Enrollment" to form name in 5.1; changed "employee" to "retiree" in 5.4.1.2; renamed document in 6.1; updated Record Retention Table.
05/05/09	C	3.1 replaced "Risk Management Senior Technician" with "Benefits Coordinator"; Rearranged Section 5.1 to read: "A retiree wishing to make an individual change to their coverage:"; then added Sections 5.1.1, 5.1.1.1, 5.1.1.2, and 5.1.2.

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