Board Policy

Peralta Community College District

Internal Revenue Service

Agreements

Prevailing Collective Bargaining

Limited to:

Pharmaceuticals, including, but not
the more efficiently and according to ap-
to the administrator, designee.

Funds

Gift of

Public

College District

Peralta

December 2006

Policy Statement

Medicare B Plan

Medicare

College District

Peralta

Pleasant Hill, CA 94523
2300 Center Court Blvd, Suite 400
Boulder Pointe

Send your annual verification to:

Where do I send the documentation?

agent

generated

quarterly basis, here who generated to pay premiums

upon attainment of age 65 and once a year thereafter

How often is documentation required?

Healthcare

prescription drug statement (copy of check),

Medicare assignment letter

Your annual Social Security statement

Any of the following documents are acceptable documents:

What is the Medicare B premium documentation

requests may be considered a gift of public funds.

negotiated and mutually acceptable.

Bargaining Agreement - effective 1/1/07, we will adhere to the eligibility criteria

No

Frequently Asked Questions

2007

to receive a Medicare B Reimbursement in

If you did not retire under a PFL contract, am I eligible?
What is Medicare B?

Medicare B helps pay for doctor services and many other medical services and supplies that may not be covered by hospital insurance.

During your employment life with Peralta, you may have contributed to the Medicare program through wages or earnings. Your contributions may meet the eligibility criteria for government-paid benefits in addition to what you receive from Peralta as a retiree enrolled in our group plan.

Background

For many years, Peralta faculty did not contribute to Medicare and were, therefore, excluded from using Medicare as a resource for medical coverage upon reaching age 65. In recent years, faculty have been extended the opportunity to pay into the Medicare program in anticipation of receiving a benefit upon retirement from the District.

Who do we reimburse?

Based on the existing criteria established in the collective bargaining agreements, we are authorized to reimburse:

- Retirees from the Peralta Federation of Teachers
- Eligible dependents (spouse/domestic partner) of retirees from the Peralta Federation of Teachers

Why do we reimburse?

As an incentive to attract faculty into the Medicare program through Peralta employment, the District agreed to implement a program which reimburses premiums withheld from Social Security or otherwise paid to Centers for Medicare Services (CMS). In recent years, faculty has been extended the opportunity to pay into Medicare in anticipation of receiving a benefit upon retirement from the District. Non-faculty have always paid into Medicare through their monthly payroll.

Where do I go for more information?

For questions regarding...

- Reimbursement eligibility criteria or a copy of the Peralta Medicare B Summary Plan Description - contact the Benefits Office (510) 587-7838, option 5#
- Accuracy of payments & receipt of documentation - contact Benefit Dynamics (925) 956-0534.
- Medicare eligibility and benefits - call (800) 772-1213 or visit your local Medicare office.

What’s new for 2007?

Did you know that reimbursement programs such as the Medicare B program are subject to IRS rules?

Although we have had the program around for a few years now, we are required to ensure that the District is compliant in its' administration of this program. Based on the Collective Bargaining Agreements, following are the highlights of the Peralta Medicare B Reimbursement Program. To receive a reimbursement, the retiree must:

1. have retired under the Peralta Federation of Teachers Collective Bargaining Agreement; and
2. maintain Peralta coverage as secondary to Medicare if age 65 or older; and,
3. provide verification of Medicare premiums paid at least annually and no later than 90 days after the end of the fiscal year. Our fiscal year ends on June 30.

We reimburse quarterly, April, July, October, January, subject to our receipt of your verification of premiums paid.

More plan administration details can be found in the Summary Plan Description. You may either:

- call the Benefits Office 510 587 7838, option 5# or,
- download your personal copy from the website: www.pswbenefits.net/eralta/retirees

(Available After January 8)