Benefits Spotlight

PRE RETIREMENT CHECKLIST

Within 90 days of Retirement-for counseling and guidance:
- Contact California Public Employees Retirement System (CalPers) about annuity benefits
- Contact California State Teachers Retirement System (CalSTRS) about annuity benefits
- Contact Social Security about income options
- Contact Medicare to inquire about medical options

Within 60 days (after retirement)
- Complete COBRA Election Notice to continue the following benefits beyond retirement effective date:
  - Dental coverage
  - Flexible benefit plan participation under Medical and/or dependent Care Reimbursement Account IRS Code 125
  - Employee Assistance Program

Within 30 days of Retirement
- Inform your department (use guidance in the Collective Bargaining Agreement)
- Complete Universal Benefit Enrollment Form in order to:
  - Confirm your insurance coverage for you and your eligible dependents as a PCCD retiree
  - Update your beneficiary on file
- Schedule personal appointment with Benefits Office. Bring:
  - Copy of recent paycheck
  - Resignation letter
  - Universal Benefit Enrollment form
  - Collective Bargaining Agreement

POST-RETIREMENT CHECKLIST

Semi-Annually
- Retirees and eligible dependents should submit the Kaiser Reimbursement Form
  Reimbursements are processed each July and January

Annually
- Inform the district’s agent (Benefit Dynamics) of your Medicare premium

Within 30 days
- Notify the District of your change of address
- Inform the district’s agent of change in Medicare Premium amount

Survivors Checklist
- 1. Notify Benefits Office of retiree’s death. Call 510.587.7838 option 5
- 2. Consider enrolling in medical insurance within 60 days of retiree’s death
- 3. Pay premiums on a monthly basis
  - Submit Kaiser Co-pay reimbursement form, if applicable send annual Medicare premium verification

CHECK OUT YOUR BENEFITS INFORMATION CENTER (BIC)!
To learn more about your welfare benefits, visit your Benefit Information Center (BIC) website:
www.peralta.pswbenefits.net or www.peralta retirees.pswbenefits.net