



RETIREE BENEFIT CHANGES PROCEDURE (BEN-P005)

Clarksville-Montgomery County School System

1.0 SCOPE:

- 1.1 This procedure outlines the process of a retiree making a change in their current benefits.

2.0 RESPONSIBILITY:

- 2.1 Benefits Associate

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

3.0 APPROVAL AUTHORITY:

- 3.1 Chief Human Resource Officer

4.0 DEFINITIONS:

- 4.1 ACH: Automated Clearing House

5.0 PROCEDURE:

- 5.1 A retired employee requests a change in their benefits.
- 5.2 Benefits Associate determines what change the retiree is requesting (i.e. dependent child, spouse coverage).
 - 5.2.1 Retiree completes a Request to Delete Dependents Medical & Dental Policy Form ([BEN-F006](#)) if this is the requested change.
 - 5.2.2 Retiree completes Request to Cancel from Blue Cross Blue Shield (ref. [BEN-F005](#)) if they want to terminate their own policy.
 - 5.2.3 Retiree completes Blue Cross/Blue Shield form Add Dependent/Change Request if they want to enroll a dependent.
- 5.3 Benefits Associate notifies Blue Cross/Blue Shield of change by email, mail, or makes change on Blue Cross Blue Shield website.
- 5.4 Benefits Associate changes the premium in the retiree log, Retiree Listing Report, Retiree Matching Report, and ACH Report if premium is paid by ACH.
- 5.5 Benefits office reviews retiree insurance reports on a monthly basis for needed changes.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Request to Delete Dependents Medical & Dental Policy Form ([BEN-F006](#))
- 6.2 Request to Cancel from Blue Cross Blue Shield Form ([BEN-F005](#))
- 6.3 Blue Cross/Blue Shield Add Dependent/Change Request Form (APP-ADC)



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7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Associated Documents	File cabinet	Indefinitely	Permanent	Secured Building
Reports	Computer	Perpetual	Permanent	Electronic Backup

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
10/02/03		Initial Release
12/12/03	A	Add 5.2.3, reference ACH debit spreadsheet in 5.5 and other retiree insurance spreadsheet in 5.6
11/30/06	B	Change Benefit Manager to Benefit Associate throughout, change approval authority, update flowchart
2/08/12	C	Deleted "Assistant" in 3.1. Added "child" in 5.2, changed info in 5.3, 5.4 and 5.6. Deleted 5.5. Updated the Retention table to reflect Reports instead of spreadsheet. Updated logo.
8/16/18	D	5.3, replaced "forwards information to" with "notifies", inserted "of change" after BCBS, added "or makes change on BCBS website".

9.0 FLOWCHART:

9.1 A flowchart detailing this process can be found in "Exhibit A" of this procedure.

***** End of Procedure *****

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