

(√)	RETIREMENT CHECKLIST
Cal PERS Retirement	
<input type="checkbox"/>	<p><u>Contact Cal PERS</u></p> <p>Contact Cal PERS at 888- 225-7377 for a phone consultation or to set up an appointment with a counselor at the Walnut Creek Office for determining appropriate retirement date, receiving retirement estimate and for assistance completing retirement paperwork.</p>
<input type="checkbox"/>	<p><u>Contact District Payroll Department</u></p> <p>Contact Diane Bradford at the District Office Payroll Department 925-229-1000x1241 to verifying accumulated sick leave balance and complete paperwork for Cal PERS.</p>
Retirement from the District	
<input type="checkbox"/>	<p><u>Notify Employer of Retirement</u></p> <p>Send memo to College President copying supervisor with last day of service and first day of retirement.</p>
<input type="checkbox"/>	<p><u>Review and Complete List of Final Duties</u></p> <p>Meet with supervisor and college Human Resources Assistant to review and complete list of final duties like returning office keys and disabling e-mail and passwords, etc.</p>
<u>District Retiree Health Benefits</u>	
<input type="checkbox"/>	<p><u>Human Resources Procedure 1120.07</u></p> <p>Review Human Resources Procedure 1120.07 Retiree Benefit Provisions found at http://www.4cd.net select Governing Board select Policies and Procedures select Human Resources.</p> <p><u>Please note:</u> The 70 point category also requires 10 years of service with the Contra Costa Community College District.</p> <p><u>Please note:</u> Surviving spouses are addresses in Section 9 and 10 of Human Resources Procedure 1120.07.</p>
<input type="checkbox"/>	<p><u>Managers, Supervisors and Confidential Employees</u></p> <p>Review Article 8.8 to 8.12 of the Managers, Supervisors and Confidential Employees Personnel Manual</p>

<input type="checkbox"/>	<p><u>Local 1 Employees</u> Review Article 20.4.7 of the Local 1 contract</p> <p><u>Please note:</u> Article 20.4.7.5.1 – Part-time Service – Addresses the proportionate amount of the premium cost that the retiree who was part-time as an active employee will be required to pay in retirement.</p>
<input type="checkbox"/>	<p><u>Calculating Your Total Points</u></p> <p>Use the Excel Spreadsheet Retirement Point Calculator for assistance in calculating your total points found under http://www.4cd.net select District Office select Human Resources select Benefits and select Retiree.</p>
<input type="checkbox"/>	<p><u>Receive a Retiree Letter Regarding Medical and Dental Coverage</u></p> <p>A retiree letter will be sent from the District Office Human Resources Department describing medical and dental coverage as a retiree.</p>
<input type="checkbox"/>	<p><u>Enrollment in Retiree Vision Services Plan and Retiree Employee Assistance Program</u></p> <p>A review of Human Resources Procedure 1120.07 - Retiree Benefit Provisions will show that neither the Vision Services Plan (VSP) nor the Employee Assistance Program (EAP) continue as a paid health benefits for retirees.</p> <p>However, retirees eligible for medical and dental coverage may enroll in CCCCD's Retiree Vision Services Plan (VSP) and the Retiree Employee Assistance Program (EAP) at the retiree's own cost.</p> <p>Retirees interested in this plan must enroll at the time of retirement. Retirees who discontinue the Retiree VSP and/or EAP plan coverage after enrollment will not be allowed to re enroll.</p> <p>Attached to the retiree letter regarding medical and dental coverage will be a Retiree VSP and EAP enrollment form containing instructions on how to enroll. Once enrolled, the retiree will be billed by the District Office Payroll Department 925-229-1000x1248.</p> <p>The enrollment form is also found under http://www.4cd.net select District Office select Human Resources select Benefits and select Retiree.</p>
<input type="checkbox"/>	<p><u>Moving Outside Medical Coverage Area</u></p> <p>Notify District Office Human Resources staff in Benefits at 925-229-1000x1294 if enrolled in Health Net or Kaiser retiree medical coverage and moving outside of medical provider service areas to discuss alternatives.</p>
<h2>Social Security</h2>	
<input type="checkbox"/>	<p><u>Determine Eligibility for Retirement Payments</u></p> <p>Contact Social Security at 1-800-772-1213 to determine eligibility and retirement estimate.</p>
<input type="checkbox"/>	<p><u>Determine Eligibility for Medicare</u></p> <p>Contact Social Security 1-800-772-1213 to determine eligibility for Medicare Part A</p>

	<p>and B.</p> <p>Please note: The Human Resources Department does not provide advice on Medicare enrollment.</p>
<input type="checkbox"/>	<p><u>Coordinate Medicare with CCCCDC Medical Plan</u></p> <p>If enrolled in Medicare Part A and B send a copy of your Medicare Part A and B card to the District Office Human Resources, attention Benefits, to begin the process of coordinating your medical plan with Medicare.</p>
<input type="checkbox"/>	<p><u>Reimbursement for Medicare Part B</u></p> <p>Retirees and spouses who meet eligibility requirements for medical benefits in retirement and who are enrolled in medical benefits through CCCCDC may receive reimbursement for Medicare Part B premium payments.</p> <p>Reimbursements begin in February of each year for the previous year. In order to receive reimbursement, attach a copy of Form SSA-1099 or similar document to the reimbursement request form and mail it to the address indicated on the form.</p> <p>The reimbursement request form is found under http://www.4cd.net select District Office select Human Resources select Retiree.</p>

Life Insurance

<input type="checkbox"/>	<p><u>Life Insurance Ends on Last Day of Paid Service</u></p> <p>Please note: Your life insurance benefit through Sun Life will end on your last day of paid service with the District. You have the option of converting to a Sun Life Assurance of Canada individual policy.</p>
<input type="checkbox"/>	<p><u>To Continue Life Insurance through an Individual Plan</u></p> <p>Contact (if continuing) Sun Life Customer Service Center at 1-800-247-6875 for up-to-date premium rates and assistance with the forms.</p>
<input type="checkbox"/>	<p><u>To Continue Life Insurance through an Individual Plan</u></p> <p>Request (if continuing) District Office Human Resources staff in Benefits at 925-229-1000x1294 to complete Notice of Group Life Conversion form and return it to you.</p>
<input type="checkbox"/>	<p><u>To Continue Life Insurance through an Individual Plan</u></p> <p>Download (if continuing) and complete the Employee's Kit for Group Life Conversion and submit paperwork and personal check to Sun Life as directed.</p> <p>Forms found under http://www.4cd.net select District Office select Human Resources select Benefits and select Sun Life Assurance of Canada and print Group Life Conversion Employee Kit and Notice of Group Life Conversion.</p>

Retiree Health Benefits for Employees Hired On or After August 1, 2005

Retiree Health Benefits for Employees Hired On or After August 1, 2005 - Agreement Between Contra Costa Community College District, United Faculty members, Local 1 members and Managers/Supervisors/Confidential employees. Retiree Health Benefits for Employees Hired On or After August 1, 2005: Employees hired on or after August 1, 2005 and their dependents will be eligible to continue receiving District sponsored medical and dental benefits under the current provisions until Medicare eligible. Once Medicare eligible, should the retiree elect to stay on any District sponsored health or dental plan, the retiree shall pay 50% of the district's cost for health and 50% of the dental fully insured premium equivalent*. The spouse may stay in the district sponsored health or dental plan, once Medicare eligible, by paying the 100% of the District's premium cost. The District shall also permit current and future retirees to purchase participation in VSP or EAP by paying for one or both at the premium rate specified by the carrier for District retirees. **The current CCCD dental plan is a fully self-insured plan (i.e. the District administers and pays claims directly). The premium rates are determined by formulas used by the District's benefits consultant to forecast actual costs. Current rates are posted on the District web site or are available by contacting the District Human Resources Department.*

1. If a retiree who is under Medicare eligibility age has an older spouse, coverage for the older spouse shall end the first of the month following the spouse's eligibility for Medicare. However, under this scenario, the retiree's coverage shall continue until the first of the month following the retiree's eligibility for Medicare. If a retiree is older than his/her spouse, coverage for the spouse and dependents (if any), shall end the first of the month following the retiree's eligibility for Medicare. When referring to spouse, this language shall also mean any qualifying domestic partner.

2. Once the retiree is eligible for Medicare, the retiree and spouse may remain on the District's retiree health plan. However, the retiree will be required to pay 50% of the District's cost for the premiums quarterly in advance. When a spouse who is older than the retiree becomes eligible for Medicare and is thus dropped from the District's sponsored program, the spouse may remain on the District's retiree health plan provided the retiree pays for the spousal portion of the premiums quarterly in advance. When referring to spouse, this language shall also mean any qualifying domestic partner.

3. The same concepts noted above shall apply to retirees selecting 2-party coverage health plans, 2 + coverage, etc.