

(√)	RETIREMENT CHECKLIST
CalPERS Retirement	
☐	<u>Meet with CalPERS retirement consultant</u> Call CalPERS for an appointment 888-225-7377.
☐	<u>District Office CalPERS contact</u> District Office CalPERS contact is Shawn Klemens 925-229-6867.
Retirement from the District	
☐	<u>Notify Employer of Retirement</u> Employee must send a memo to College President copying supervisor with last day of service and first day of retirement.
☐	<u>Review and Complete List of Final Duties</u> Employee must meet with their supervisor and college human resource staff to review and complete list of final duties such as returning office keys, disabling passwords etc.
Retiree Health Benefits	
☐	<u>Review Human Resource Procedure 1120.07</u> – found at www.4cd.edu select Governing Board, select Policies and Procedures, select Human Resources. <u>Please note:</u> The 70 point category requires 10 years of service with the Contra Costa Community College District. <u>Please note:</u> Surviving spouses are addressed in section 9 and 10. <u>Please see:</u> If hired after July 1, 2005, please review the Local 1 contract or Management Council Manual under retiree benefits. <u>Point calculator:</u> Contact Renita Mack - RMack@4cd.edu or 925-229-6855 to request a point calculator to calculate total points toward retirement.
☐	<u>Retirement letter concerning medical and dental coverage</u> A retiree letter will be sent from the Human Resources Department at the District Office (contact Renita Mack at 925-229-6855 or RMack@4cd.edu) describing the retiree's medical and dental coverage.

☐	<u>Vision Services and Employee Assistance Program</u> According to Human Resources Procedure 1120.07 (Retiree Benefit Provision) neither the Vision Services Plan, nor the Employee Assistance Program are part of the retiree benefit plan. However, participation by retirees was negotiated to allow retirees eligible for medical and dental coverage to participate in a District sponsored voluntary retiree Vision Services Plan (VSP) and Employee Assistance Program by paying the full premium. The enrollment form can be found at www.4cd.edu, select Human Resources, Benefits and Retirees. Complete the form and return the form as indicated on the form. The District Office Payroll Department (925-229-6863) will invoice participants. <u>Please note:</u> Many retirees continue the VSP and Employee Assistance program through COBRA (for 18 months) before enrolling in the voluntary District sponsored retiree VSP and Employee Assistance program.
☐	<u>Moving Outside Kaiser Medical Coverage Area</u> Retirees with Kaiser medical coverage that move outside of a Kaiser service area must enroll in the Anthem Blue Cross medical plan which has a national network in order to continue medical coverage. Contact Renita Mack at 925-229-6855 or RMack@4cd.edu for more information.
Social Security	
☐	<u>Active Employees and Retirees</u> Active employees and retirees turning 65 years of age are strongly advised to meet with a Social Security (800-772-1213) representative (with spouse, if applicable) to discuss: 1) Eligibility for ALL social security programs and payments, 2) Eligibility for Medicare A and B, and 3) Deferral of Medicare Part B enrollment until retirement (if still working for the District). <u>Please note:</u> Neither of the District's providers (Kaiser Permanente or Anthem Blue Cross) allow employees (or spouse if applicable) who have not retired from the District to enroll in a Medicare plan (Kaiser Senior Advantage plan or Anthem Medicare). The employee must first retire from the District in order to enroll in a District sponsored Medicare plan.
Medicare Plan	
☐	<u>Medicare Plans</u> Retirees of the District that are eligible for Medicare A and B are required to enroll in Medicare A and B through their Social Security Office (800-772-1213), then enroll in a District sponsored Medicare plan. The District's plans are Anthem Medicare PPO which is a national plan and Kaiser Senior Advantage.
☐	<u>Reimbursement for Medicare Part B</u> Retirees (and spouse, if applicable) of the District that are enrolled in a District

sponsored Medicare plan are eligible for reimbursement of Medicare Part B premiums on quarterly basis. The reimbursement forms are available at the District website at www.4cd.edu, select Human Resources, Benefits and then retirees.

Please note: Medicare Part B reimbursement is **ONLY** available to retired employees who are on a District sponsored Medicare plan. Employees who are still working for the District and have not retired are **NOT** eligible for Medicare Part B reimbursement.

Life Insurance



Life Insurance

The District's term life insurance policy ends on the last day of paid service. However, employees have the option of converting to an individual plan at the time of retirement. If interested, go to www.4cd.edu, then select Human Resources, Benefits and Sun Life, then select the document titled, "Conversion Application." This document will provide guidance on how to determine your cost to continue and the forms and documents that need to be submitted to Sun Life.

If you need assistance, please contact Renita Mack at 925-229-6855 or RMack@4cd.edu.