



## 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.

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

### 2.0 RESPONSIBILITY:

- 2.1 Benefits Associate

### 3.0 APPROVAL AUTHORITY:

- 3.1 Assistant Human Resources Director

### 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, 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 emails information to Blue Cross/Blue Shield.
- 5.4 Benefits Associate changes the ACH debit authorization.
- 5.5 Benefits Associate changes ACH debit excel spreadsheet by adjusting the code and premium amount.
- 5.6 Benefits office reviews other retiree insurance spreadsheet 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)

### 7.0 RECORD RETENTION TABLE:

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

### **8.0 REVISION HISTORY:**

<b><u>Date:</u></b>	<b><u>Rev.</u></b>	<b><u>Description of Revision:</u></b>
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

### **9.0 FLOWCHART:**

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

**\*\*\* End of procedure \*\*\***

# Retiree Benefit Changes Flowchart

