



# Los Angeles Unified School District Benefits Administration Branch

## RETIREMENT ELIGIBILITY VERIFICATION FORM

Complete this form to request the verification of eligibility for District Sponsored Health Benefits. Employee must be in paid status and eligible for benefits at the time of request. Please allow 90 days for research and response. If you are retiring within 6 months, you do not need to complete this form. Please complete and submit the Application for Continuation of Health Benefits (HI22) only.

Employee Number	Last Name	First Name	M.I.
Telephone Number	Birthdate	Email Address	
Employee Classification (Please check one):			
Certificated <input type="checkbox"/>		Classified <input type="checkbox"/>	
Retirement Type (Please check one):			
Service Retirement <input type="checkbox"/>		Disability Retirement <input type="checkbox"/>	
Estimated Retirement Date: _____			
<b><u>In order for your request to be processed, estimated retirement date must be within 24 months of date of request.</u></b>			

I understand I must comply with the rules and requirements of the District, Bargaining Unit provisions, and Retirement System. I understand the information provided to me is solely to be used for an estimated retirement date and only pertains to eligibility for District-sponsored medical, dental, and vision retiree coverage.

Employee Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Complete and return this form (fax or email preferred) to:**

**Fax: (213) 241-4247**

**Email: [benefits@lausd.net](mailto:benefits@lausd.net)**

Los Angeles Unified School District - Benefits Administration

P.O. Box 513307

Los Angeles, CA 90051-1307

Phone: (213) 241-4262

**Website: <http://benefits.lausd.net>**

**If you change your address, you must notify Benefits Administration or you may fail to receive important benefits information. Failure to receive information could result in the loss of your benefits.**

## **Retirement with Health Benefits Eligibility Guidelines**

### **TO RECEIVE COVERAGE AS A RETIRED EMPLOYEE, YOU MUST MEET THE FOLLOWING REQUIREMENTS:**

1. Select any available plan you wish to be enrolled in at the time of retirement. If your selection is different than the plan you are currently enrolled in, the effective date will be the first of the following month after your retirement date.

If you are not enrolled in a medical, dental, or vision plan, you must contact Benefits Administration regarding enrollment procedures **before** your retirement date.

2. You must resign to **retire** from District service and be eligible to receive an allowance from your retirement system (CalSTRS or CalPERS) for either age or disability retirement the day after your District resignation.

- You are not eligible for retirement health benefits if you separated, resigned without retiring, or were dismissed from District service.
- Your District resignation date and CalSTRS/CalPERS retirement date must be consecutive dates (and may include weekend days).
- If there is a gap between your District resignation date and your CalSTRS/CalPERS retirement date, you will not be eligible for retiree health benefits.

3. You must receive a monthly retirement payment from your retirement system. **If you take deferred retirement (that is, leaving funds on deposit with the retirement system for withdrawal at a later date) or a lump sum distribution, you are not eligible for these retirement health benefits.**

4. You must meet the following requirements:

- a. For employees hired prior to March 11, 1984, five (5) consecutive years of qualifying service immediately prior to retirement shall be required in order to qualify for retiree health benefits for the life of the retiree.
- b. For employees hired on or after March 11, 1984, but prior to July 1, 1987, ten (10) consecutive years of qualifying service immediately prior to retirement shall be required in order to qualify for retiree health benefits for the life of the retiree.
- c. For employees hired on or after July 1, 1987, but prior to June 1, 1992, fifteen (15) consecutive years of qualifying service immediately prior to retirement shall be required, or ten (10) consecutive years immediately prior to retirement plus an additional ten (10) years which are not consecutive.
- d. For employees hired on or after June 1, 1992, years of qualifying service and age must total at least eighty (80) in order to qualify for retiree health benefits. For employees who have a break in service, this must include at least ten (10) consecutive years immediately prior to retirement.
- e. For employees hired on or after March 1, 2007 shall be required to have a minimum of fifteen (15) consecutive years of service with the District immediately prior to retirement, in concert with the "Rule of 80" eligibility requirement (section 4.0 (d) above) to receive employee and dependents' health and welfare benefits (medical dental and vision) upon retirement as provided for in this agreement.
- f. For employees hired on or after April 1, 2009, years of qualifying service and age must total at least eighty-five (85) in order to qualify for retiree health benefits. This must include a minimum of twenty-five (25) consecutive years of service with the District immediately prior to retirement.
- g. For School Police (sworn personnel), if you were hired on or after April 1, 2009, the employee's age plus the number of consecutive qualifying years of service, when added together, must equal 80 and you must have twenty (20) consecutive years of qualifying service immediately prior to retirement.

5. Medicare requirement (Effective January 1, 2010):

- If you and/or your dependent reach/are age 65 or older you must enroll and remain enrolled in Medicare Part B. **If you do not enroll in Medicare Part B, you will lose your health benefits until proof of enrollment is submitted.**
- If you and/or your dependent are eligible for Medicare Part A premium-free from the Centers of Medicare and Medicaid Services (CMS), you must enroll and remain enrolled in Medicare A.
- If you are not eligible for Medicare Part A premium-free from CMS, you must verify ineligibility by providing LAUSD Benefits Administration with a confirmation letter from CMS. **Not complying with Medicare A requirements will negatively impact your medical and prescription coverage.**

If you are a member of Kaiser, you must enroll in Senior Advantage (Kaiser's Medicare Advantage Plan) in order to maintain your coverage. If you are a member of Health Net HMO, you must enroll in Seniority Plus (Health Net Medicare Advantage Plan) in order to maintain your coverage. All retirees in Anthem Medicare Preferred (PPO) Medical plan or Health Net Seniority Plus plan must have Medicare parts A and B.