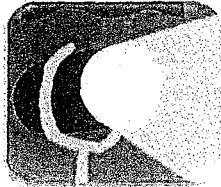




# PERALTA BENEFITS - EVERYONE

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## Benefits Spotlight

Checklist & Checkup:  
Thinking about Retirement or Already Retired?  
Are you the Survivor of a Peralta Retiree?

### PRE-RETIREMENT CHECKLIST

#### Within 90 days of Retirement

- Contact PERS or STRS for counseling and guidance.
- Contact Social Security and/or Medicare to inquire about income or medical options.

#### Within 60 days

- Complete COBRA Election Notice to continue dental or flexible benefit plan participation beyond your effective retirement date.

#### Within 30 days of Retirement

- Inform your department (use guidance in the Collective Bargaining Agreement)
- Complete Universal Benefit Enrollment Form in order to:
  - Confirm your insurance coverage for you and your eligible dependents as a PCCD retiree.
  - Update your beneficiary on file.
- Schedule personal appointment with Benefits Office. Bring:
  - Copy of recent paycheck
  - Resignation letter
  - Universal Benefit Enrollment form

### POST-RETIREMENT CHECKLIST

#### Semi-Annually

- Retirees and eligible dependents should submit the Kaiser Reimbursement Form. Reimbursements are processed each July and January.

#### Annually

- Inform the district agent (Benefit Dynamics) of any changes to your Medicare premium or within 30 days of your premium change.

#### Within 30 days

- Notify the District of your change of address.

### Survivors Checklist

- 1. Notify Benefits Office of retiree's death. Call 510.587.7838 option 5.
- 2. Consider enrolling in medical insurance within 60 days of retiree's death.
- 3. Pay premiums on a monthly basis.
  - Submit Kaiser Co-pay reimbursement form.
  - Send annual Medicare premium verification.



**CHECK OUT YOUR BENEFITS INFORMATION CENTER (BIC)!**

To learn more about your welfare benefits, visit your Benefit Information Center (BIC) website:

[www.peralta-newbenefits.net](http://www.peralta-newbenefits.net) or [www.peralta-retirees.nswbenefits.net](http://www.peralta-retirees.nswbenefits.net)