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## Retirement Over 65 Procedure (BEN-P003)

Milford Public School District

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### 1.0 SCOPE:

- 1.1 This procedure describes the steps in which the Benefits Department processes Retirements.

The on-line version of this procedure is official. All printed versions are uncontrolled copies.

### 2.0 RESPONSIBILITY:

- 2.1 Director of Human Resources

### 3.0 APPROVAL AUTHORITY:

- 3.1 Benefits Coordinator

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Approval Signature on File  
Signature Date

### 4.0 DEFINITIONS:

- 4.1 PAN – Personnel Action Notice.
- 4.2 COBRA – Continuation Of Group Health Benefit After Termination
- 4.3 HIPAA – Protected Health Information.

### 5.0 PROCEDURE:

- 5.1 Benefits Department is in receipt of retirement PAN generated by Human Resources Department.
- 5.2 Appropriate information forms according to contract based on age are forwarded to retiree.
- 5.3 Information is deleted from the active system keyed into the retirement system. (Microsoft Works)

### 6.0 ASSOCIATED DOCUMENTS:

- 6.1 PAN (PER-F004)
- 6.2 Medical/Dental Enrollment Forms – External Document
- 6.3 Life Enrollment Forms – (BEN-F009)
- 6.4 Plan Choice Response Forms (BEN-F006)
- 6.5 Medicare Eligibility Form (BEN-F007)

### 7.0 RECORD RETENTION TABLE:

| <u>Identification</u>     | <u>Storage</u>  | <u>Retention</u> | <u>Disposition</u>      | <u>Protection</u>               |
|---------------------------|-----------------|------------------|-------------------------|---------------------------------|
| Documents 6.1 through 6.5 | Benefits Office | 99 years         | 99 years                | Locked Cabinet<br>Locked Office |
| Benefits Data Base        | Electronic      | 99 years         | Benefits Retiree System | Electronic BackUp               |

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**8.0 REVISION HISTORY:**

| <u>Date:</u> | <u>Rev.</u> | <u>Description of Revision:</u>  |
|--------------|-------------|--|
| 08/25/2003   | A           | Initial Release  |
| 04/27/2004   | B           | Remove original 5.1 statement, 6.0, Add form #s to 6.1 and 6.3, 7.0, change Retention field to 99 years. |

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