
Medicare Reimbursement Procedure (BEN-P007)

Milford Public School District

1.0 SCOPE:

- 1.1 This procedure describes the process by which the Benefits Department initiates reimbursement of Medicare B payments to eligible retired employees.

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

Approval Signature on File

Signature

Date

4.0 DEFINITIONS:

- 4.1 AP Accounts Payable

5.0 PROCEDURE:

- 5.1 Retirees mail proof of payment for Medicare Part B to Benefits Department.
- 5.2 Using Excel, Benefits Department prepares and approves paperwork for reimbursement.
- 5.3 Completed Medicare Reimbursement check requests and back up are given to AP department for processing with next check run.
- 5.4 A copy of completed check request is filed in Benefits Department for reference as needed.
- 5.5 A list of monthly and fiscal year payments is maintained in Benefits Department. This list is distributed at end of each month to: AP Dept; & Chief Accountant.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Medicare Reimbursement Document
- 6.2 Excel Spread Sheet: Medicare Reimbursement Payment List
- 6.3 Invoice / Back up (provided by individual retirees)
- 6.3.1 Monthly copy of bank or charge statement showing payment
- 6.3.2 Quarterly Medicare Part B Invoice for previous billing period
- 6.3.3 Annual Form SSA 1099 for previous year
- 6.4 Word Document: Criteria for Medicare Part B Reimbursement

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Copy Check Request & List of all reimbursed	Benefits Office	3 years	shred	Locked Cabinet in Locked Office

Medicare Reimbursement Procedure (BEN-P007)
Milford Public School District

retirees

Word & Excel
Documents

Electronic

Electronic

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
04/22/2004	A	Initial Release

* * * E n d o f p r o c e d u r e * * *