

BENEFIT COORDINATOR WEBINAR

STATE AGENCIES

Nov. 29, 2011

Benefit Coordinator Resources

- Online information, forms, and instructions at wvpeia.com
- Shopper's Guides and Summary Plan Descriptions
- Minnesota Life Benefits Booklet, Rate Sheets, and Forms
- Mountaineer Flex Benefits Booklet and Forms
- PEIA Customer Service
- PEIA Benefit Coordinator Liaison – MickiAnne Henkels



West Virginia Public Employees Insurance Agency

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Benefit Coordinators

Announcements

↑ Important announcements and updates about PEIA health insurance and related services ... [Learn more.](#)

Premium Rates

See employers' portion of the premium rates for Preferred Provider (PPB) Plans ... [Learn More.](#)

Benefit Coordinator Briefing

↑ The BC Briefing provides timely updates about health insurance and other services provided by PEIA ... [Learn more.](#)

Benefit Coordinator Training

Benefit coordinators can participate in [Open Enrollment Training](#), [PEIA 101](#) and other classes to help them carry out this important role. You can enroll on-line, too.

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Benefit Coordinator Announcements

Wells Fargo TPA to be Purchased

Third Party Administrator agrees to be purchased by HealthSmart

Upcoming Hearings and Presentation

Hearings will be held in Charleston, Beckley, Martinsburg, Morgantown, Wheeling and Huntington.

PEIA Weight Management Program

Change your lifestyle and improve your health with PEIA's Weight Management Program!

Ornish Heart Disease Programs Coming

Learn how to prevent or reverse heart disease at an upcoming Dr. Dean Ornish event.

Premium Discounts Still Available

Save up to \$14 a month for participating in Improve Your Score and having a Advance Directive/Living Will.

Early Warning Reports and Billing Attribute Reports

Learn the differences between these reports and which one to use to determine premiums for the new plan year

Get Your SPD

The Summary Plan Description for Plan Year 2012 is now available.

Check Your Discounts

Check the status of your Improve Your Score and Advance Directive/Living Will discounts before Plan Year 2012 starts.

Premium Discount

Premium Discounts available throughout plan year

Lost ID Card?

Contact Wells Fargo to get a replacement ID card for a Preferred Provider (PPB) Plan.

Weight Watchers Discount

Weight Watchers offers discount to PEIA members who join in 2011.

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Benefit Coordinator Briefing

Below are updates and information about managing member benefits for benefits coordinators. You can subscribe to the BC Briefing by click on the RSS Feed button

[Benefit Coordinator Training Documents](#)

Benefit Coordinator Training Documents are available online

[Lost or Missing ID Cards](#)

Receiving a new or replacement ID card is easy!

[Walgreens Pharmacy change effective Dec. 31st](#)

Walgreens Pharmacy will stop participating in the PEIA pharmacy network at the end of the year

[Timely Filing of Medical Claims](#)

How long do you have to file a claim?

[PEIA Weight Management Program](#)

Change your lifestyle and improve your health with PEIA's Weight Management Program!

[Face to Face Diabetes Management Program](#)

Face to Face Diabetes Management Program offers members many benefits.

[Early Warning Reports and Billing Attribute Reports](#)

Learn the differences between these reports and which one to use to determine premiums for the new plan year

[Premium Discount](#)

Premium Discounts available throughout plan year

[Living Will Affidavit for New Enrollees](#)

New enrollees can complete their Living Will Affidavit online or with the new enrollment form.

[Policyholders Can View Their "Improve Your Score" Status Online](#)

Policyholders can view their Improve Your Score status at Manage My Benefits

[Notices from PEIA Regarding Documentation for Eligibility and Changes](#)

Watch your inbox for notices from PEIA regarding documentation required.

[Minnesota Life sending forms to update beneficiaries](#)

MN Life sending letters and forms to policyholders to update their beneficiaries in 2011.

[Online Transfer Process](#)

Tomblin, Donna G



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Benefit Coordinators

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See employers' portion of the [premium rates](#) for Preferred Provider (PPB) Plans ... [Learn More.](#)

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Training Request Form

Fields Marked * are Required

First Name *

Last Name *

Organization *

Street Address

City

State

Zip

Email *

Phone *

Training Event

Comments

- Non-State Agency Web Contributions Training - Dec. 6 Stonewall Resort
- Non-State Agency Web Contributions Training - Dec. 7 Oglebay Resort
- PEIA 101 - December 7**
- PEIA 101 - February 1, 2012
- PEIA 101 - March 7, 2012
- EPIA 101 - April 4, 2012



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Open Enrollment Ends April 30
 Make changes to your insurance and other benefits by the end of April.

PEIA Offers Premium Discounts
 In plan year 2012, members can enjoy lower premiums by having a living will and through the Improve Your Score program.

Forms and Downloads

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Manage My Benefits

PEIA > Find a Form

Find a Form

The following is an alphabetical list of forms and documents on the Web site.

If a form has **MMB** next to it, you can complete it online by going to [Manage My Benefits](#). It's easier, faster and leads to fewer mistakes than printing a form and sending it to PEIA.

Forms

Allergy Test Precertification Form

Basic and/or Optional Life Insurance Change of Beneficiary Form (**MMB**)

Basic Life Insurance Enrollment Form (**MMB**)

Bayer Meter Request Fax Order Form

Benefit Coordinator Supply Order Form

Change-in-Address Form (**MMB**)

Change-in-Status Form (**MMB**)

CKD Initial Screening Form

Coordination of Benefits Form

Dependent Ineligibility Form

Dependent Qualification Affidavit

Direct Deposit Form

Direct Draft Form

Discount Waiver Request Form

Disabled Dependent Eligibility Application

Drug Formulary Inquiry Form

Employer's Authorization to Remove PEIA Coordinator

ESRD Initial Screening Form

Evidence of Insurability Form

Health Benefits Enrollment Form (**MMB**)

HealthCheck Forms (go to "Provider Information")

HIPAA Authorization Form

Improve Your Score Premium Discount Form

Mainframe Access Request Form

Medical Claim Form

Medical Home Application and Physician Selection Form

Medical Home ID Card Request Form

Medical Home Provider Application Form

Medicare COB Drug Claim Form

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Third Party Administrator agrees to be purchased by HealthSmart
- [Upcoming Hearings and Presentation](#)
Hearings will be held in Charleston, Beckley, Martinsburg, Morgantown, Wheeling and Huntington.
- [Medicare Advantage Prescription Drug RFP Now Available](#)
Information about the Medicare Advantage Prescription Drug request for proposal

Related Items

Forms and Downloads

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Benefit Coordinators

- Enrollment Forms
- Shopper's Guides
- Summary Plan Descriptions
- Premium Rates
- Preferred Provider (PPB) Plans
- Life Insurance
- Mountaineer Flexible Benefits
- Training & Instructional Documents
- Benefit Coordinators Reference Manual
- Other Post-Employment Benefits (OPEB)
- Payroll & Financial Reporting Information
- Other Documents



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February 2011 Benefit Coordinator Reference Manual

- [How to Manage My Benefits](#)
- [Eligibility](#)
- [Premium Accounts](#)
- [Life Insurance](#)
- [Mountaineer Flex Benefits - Coming soon!](#)
- [COBRA](#)
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Recent Improvements to Manage My Benefits Website

- Revised registration process:
 - More user-friendly
 - Increased security with unique user names, e-mail addresses, and security questions
 - Improved functionality to better manage employee's information
 - Role selection option to save time and effort

Next Phase of Improvements to Manage My Benefits Website

- Add ability to securely attach scanned documents in Manage My Benefits when enrolling for benefits or making qualifying event changes; documentation would follow the process so can be seen and used by BCs for approvals
- Comments to also be made visible for approvals/disapprovals
- System will no longer delete existing qualifying events
- Improved transfer screens to show additional BC information
- Capture and display additional information for agencies (phone numbers, coordinators, etc.)
- Archive older incomplete transactions from system
- Additional access improvements to come in subsequent phase

How to Use Manage My Benefits (Policyholders)

- Detailed instructions for new employees are found on Pages 7 through 14 of the How To Manage My Benefits section of the online BCRM
- Allows employees and retirees to complete all eligibility transactions (except retirement and termination of all benefits)
- Only paper submitted will be documentation required with the Documentation Memo

Benefits Administration System (BAS) Web Application



[Enrollment Selection Menu](#) [My Account](#) [Shopper's Guide](#)

Enrollment Selection Menu

View or print coverage now in effect.	View/Print My Current Coverage
View or print choices made previously but are not yet in effect.	View/Print My Pending Coverage
View or print coverage that will be effective as of July 1, 2011	Coverage for the Next Plan Year
Verify your address and coverage attributes.	Policyholder Summary
Verify your tobacco affidavit choice.	Tobacco Affidavit
Verify your living will choice.	Advanced Directives / Living Will
Add new or edit existing dependents.	Dependent Summary
Choose your health benefits.	Manage My Health Benefits
Choose your optional life insurance.	Manage My Optional Life Insurance
Choose your dependent life insurance.	Manage My Dependent Life Insurance
View or change beneficiary information.	Beneficiary Summary

How to Use Manage My Benefits (Benefit Coordinators)

- Register as a Benefit Coordinator using the Need to Register function in Manage My Benefits
- Must register separately as a Benefit Coordinator, Web Contributions Coordinator, and policyholder

Logged In As: [Benefit Coordinator](#)

Welcome, Mickianne! ([Logout](#))

Benefits Administration System (BAS) Web Application



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Benefit Coordinator Menu

Search for Policyholder Coverage Changes.	Search Coverage Changes
View All Policyholder Coverage Changes.	View All Coverage Changes
Review Assigned Agencies.	View Agency(ies)
Transfer a Policyholder Between Agencies.	Transfer Policyholder
Review Transfers.	Review Policyholder Transfers

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Benefits Administration System (BAS) Web Application



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Number of results returned: 4

Now Showing: **Awaiting My Approval Only** | [Click here to Show Everything](#)

XXXXXXXXXX	XXX-XX-XXXX	HEALTH DEPT
	Final Date	Status
Health:	11/02/2011	SUBMITTED
		Review Health
XXXXXXXXXX	XXX-XX-XXXX	HEALTH DEPT
	Final Date	Status
Basic:	11/15/2011	DATA UPLOADED TO BAS
Health:	11/16/2011	DATA UPLOADED TO BAS
Optional:	11/15/2011	DATA UPLOADED TO BAS

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Transfers

- Transfers from one participating agency to another without a lapse in employment allows benefits to continue uninterrupted
- Transfers made online allow direct rollover of benefits; once approved, the receiving BC can view the new employee's coverage in Web Contributions the following day
- PEIA collects updated salary information from the receiving BC on which the premium at the new (receiving) agency will be based
- A Transfer is NOT a qualifying event; no changes can be made to the policyholder's coverage unless a financial hardship is created by the transfer, and that requires an appeal, in writing, with supporting documentation

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Online Transfer Procedure

- All you need is the transferring employee's name and social security number to begin the transfer:
- 1. Select Transfer Policyholder from the menu, then enter the employee's SSN. When the name pops up, click on it.
- 2. Pick the first letter of the RECEIVING agency's name off the alphabetical list, and click on that agency in the list.
- 3. The benefit coordinator RECEIVING the employee always sets the new index code for the employee (or **choose "No IDX Needed" if you're a non-state agency**) and the effective date of the transfer.
- 4. The benefit coordinator who is SENDING or losing the employee sets or agrees with the transfer effective date.
- The system notifies the 'other' (non-originating) benefit coordinator via e-mail when a transfer is pending, asking them to log in and review the transfer. Once the 'other' benefit coordinator has approved the transfer, the system notifies the policyholder of the transfer via e-mail (if there is an e-mail address on record for the policyholder). When the transfer is complete, the employee will be moved from the SENDING agency's account to the RECEIVING agency's account.
- The agency losing the employee **MUST NOT** go into the Web Contributions System and terminate coverage for the employee. **If you terminate coverage, the transfer cannot happen.** **No action in the Web Contributions System is necessary.**

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Benefit Coordinator Transfer Search

Agency Name:

ABCDEFGHIJKLMNOPQRSTUVWXYZ0123456789



OR

Last Name:

First Name:

OR

SSN: - -

Review Agency Selection

Click an agency name to view all search results for that agency.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9

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- **PENDLETON CO HEALTH DEPT**
- **PENDLETON COMMUNITY CARE**
- **PENDLETON SENIOR & FAMILY**
- **PETERSBURG, CITY OF**

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Transfer Search Results

Click on the name of the employee to review the transfer request.

<u>Name</u>	<u>SSN</u>	<u>From Agency</u>	<u>To Agency</u>	<u>Status</u>
DELANCEY, CHARLES L.	XXX-XX-XXXX	HEALTH DEPT	WEST VIRGINIA UNIVERSITY	Submitted

[New Search](#)

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Submission of Documentation

Qualifying Events:

- Submit Documentation **with a Change-In-Status form** for qualifying events. The Change-In-Status form can be found on **Page 6** in the Forms & Instructions section of the Benefit Coordinator Reference Manual.
- If the documentation is **not** available at the time the Change-In-Status is submitted, mail it to PEIA with the **Documentation Checklist** found on **Page 9** in the Forms & Instructions section of the Benefit Coordinator Reference Manual.

Open Enrollment:

- If Open Enrollment changes were made online at Manage My Benefits, the required documentation should be submitted using the **Documentation Checklist** found on **Page 9** in the Forms & Instructions section of the Benefit Coordinator Reference Manual.
- Submit Documentation **with an Open Enrollment Transfer form** to add dependents, change health coverage, or update your tobacco status. The Open Enrollment Transfer form will be generated and sent to the policyholder when they contact PEIA Customer Service.

State of West Virginia - Public Employees Insurance Agency Change-In-Status Form

Change in Status

Complete this form to change the status of your coverage. Complete all sections as appropriate except the sections "AGENCY" and "PEIA" and return to your benefit coordinator.

EMPLOYEE	Name (Last) _____ (First) _____ (MI) _____ (Generation: Jr., Sr., etc.) _____		Social Security Number _____	
	Street Address _____ Check if New Address <input type="checkbox"/>		County of Residence _____ Home Phone () _____	
	City _____ State _____ Zip _____		Job Title _____ Work Phone () _____	
	Do you participate in the IRS Section 125 Premium Conversion Plan sponsored by PEIA, if available? <input type="checkbox"/> YES <input type="checkbox"/> NO 			

CHANGE TYPE	Please indicate the type of status change you are making:	
	<input type="checkbox"/> 001	Change name as listed above to: (Last) _____ (First) _____ (MI/Gen) _____
	<input type="checkbox"/> 002	Transfer employee's premium billing from Employer Account # _____ To Account # _____ within the same agency
	<input type="checkbox"/> 003	Add Dependents to: Mark your choice(s): <input type="checkbox"/> Health <input type="checkbox"/> Dependent Optional Life Insurance (Check one) <input type="checkbox"/> Plan 1 <input type="checkbox"/> Plan 2 <input type="checkbox"/> Plan 3 <input type="checkbox"/> Plan 4 <i>If outside the initial enrollment period, an Evidence of Insurability Application for Coverage is required for life insurance coverage.</i>
	<input type="checkbox"/> 004	Remove Dependents from: Mark your choice(s): <input type="checkbox"/> Health <input type="checkbox"/> Dependent Optional Life Insurance
	<input type="checkbox"/> 005	Change in managed care plan (Requires PEIA approval if outside open enrollment) From: (Plan Name) _____ To: (Plan Name) _____
	<input type="checkbox"/> 006	Add Health coverage. (Check only one) <input type="checkbox"/> PEIA PPB Plan A <input type="checkbox"/> PEIA PPB Plan B <input type="checkbox"/> PEIA PPB Plan C <input type="checkbox"/> Health Plan HMO Plan A <input type="checkbox"/> Health Plan HMO Plan B
	<input type="checkbox"/> 007	Drop Health coverage. Keep life insurance ONLY. (This terminates health coverage for policyholder and all dependents.)
<input type="checkbox"/> 008	Tobacco status change	

DEPENDENT	Name (Last, First, MI, Generation)	Address (If different from above)	Relationship (Circle One)	Sex/Category	Birth Date	Social Security Number	Other Insurance (Plan Name)
	-----	-----	SP CH				
	-----	-----	SP CH				
	-----	-----	SP CH				
	-----	-----	SP CH				

CATEGORY for Dependent Child(ren): Relationship Code 1. Child (biological or adopted) 2. Step-child 3. Grandchild 4. Court-Ordered Dependent Child 5. Student (age 19-25) 6. Other In dependent column titled "Sex/Category", please include both gender and relationship code (e.g., M1 for Male Child; F3 for Female Grandchild; F25 for Female Step-child/Student, etc.). If adding a dependent child other than your biological or adopted child, a notarized copy of documentation is required showing that the child is completely dependent upon the member for financial support.

REASON	Policyholder must provide documentation for every type of status change.					
	<input type="checkbox"/> 1	Marriage	<input type="checkbox"/> 5	Death of spouse or dependent	<input type="checkbox"/> 9	Ineligibility of dependent child due to age, marriage, or loss of full-time student status
	<input type="checkbox"/> 2	Divorce	<input type="checkbox"/> 6	Beginning or end of spouse's employment	<input type="checkbox"/> 10	Change from full-time to part-time employment or vice-versa for employee or spouse
	<input type="checkbox"/> 3	Birth of Child	<input type="checkbox"/> 7	Significant change in health coverage due to spouse's employment	<input type="checkbox"/> 11	Open Enrollment
<input type="checkbox"/> 4	Adoption	<input type="checkbox"/> 8	Unpaid leave of absence by employee or spouse	<input type="checkbox"/> 12	Other (please specify): _____	
I certify that on ____/____/____ (date of event) I incurred the status change marked above, and I, therefore, wish to change my plan benefits as indicated. I understand that the change requested must be consistent with the event. I further understand that I am required to maintain documentation of this event, and I may be requested to provide this documentation to the WV Public Employees Insurance Agency, my employer, or the Internal Revenue Service for Section 125 purposes.						



Improve Your Score Discount

- \$10 per month discount off the standard health premium
- **Active** employees in PEIA **PPB Plans A, B or C**
- Not available to retired policyholders or HMO policyholders
- Based upon participation and not the color-coded outcome
- Results received year-round; discount will begin in month following receipt and processing of scores



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Health Information

Health & Wellness Programs

PEIA provides various care management programs and the Pathways to Wellness program. Care management programs include tobacco cessation benefits, Face to Face Diabetes Program and other programs. Pathways to Wellness includes the Improve Your Score program and other successful plans ... [Learn more.](#)

Web Sites

Recommended Web sites for information about maintaining and improving your health ... [Learn more.](#)

Health Tips

Practical tips for maintaining and improving your health ... [Learn more.](#)



Join WeightWatchers in 2011 and get a \$15 discount off the \$40 membership fee. Show your PEIA Medical Card to get the discount. Then pay \$12 / week to participate. Contact your nearest WeightWatchers location for more info.



Welcome to PEIA Pathways to Wellness

Studies have shown workplace wellness programs significantly improve long-term health, reduce absenteeism and health care costs, minimize job-related accidents and improve employee morale. Participation in the Pathways to Wellness program could make your worksite a healthier and more productive environment providing a great benefit to your employees.

[» Learn More](#)

Worksite of the Month

Bruceton School
[Click Here](#)
[View Archive](#)

Quick Links

Select

Enroll Your Worksite

- » FAQs
- » Online Application
- » Support Letter
- » Worksite Criteria
- » Enrollment Letter
- » Success Stories

Worksite Resources

- » Health Screens
- » Saturday Morning Screens
- » Health Promotion Consultants
- » Health Resources
- » Grant Program
- » Worksite Coordinators

News & Announcements

Eligibility for the PEIA Weight Management Program has changed! If you have a Body Mass Index of 25 or greater; or for a woman a waist circumference of 35 inches or more; or 40 inches or more for a man, you may



Show your PEIA Medical Card to get the discount. Then pay \$12 / week to participate

Contact your nearest WeightWatchers location for more info.

Home | PEIA Web Site | Ask Pathways | Contact

Health Screens

Select by Map

Select by List

Health screens for various PEIA locations are now scheduled. Talk to your [Pathways Health Promotion Consultant](#) to schedule a health screen.

Read our [Blood Testing Definitions pamphlet](#) for more information on the testing offered at PEIA Pathways to Wellness health screens.

Click your county on the map below to view Health Screens in your county.



Worksite of the Month

Bruceton School

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Quick Links

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- » FAQs
- » Online Applicatic
- » Support Letter
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- » Enrollment Letter
- » Success Stories

NEW! Saturday Mornin Screens

WV Work It Ou
Program





Show your PEIA medical card to get the discount. Then pay \$12 / week to participate.

Contact your nearest WeightWatchers location for more info.

Home | PEIA Web Site | Ask Pathways | Contact Us

Health Screens

Select by Map

Select by List

Health Screens for Putnam County:

[Go Back](#)

Date	County	Location	HPC
1/12/2012	Putnam	Putnam County Career and Technology Center	Mandy Childers
1/26/2012	Putnam	Eastbrook Elementary	Mandy Childers
3/8/2012	Putnam	Rock Branch Elementary	Mandy Childers
3/23/2012	Putnam	Lakeside Elementary	Mandy Childers
4/4/2012	Putnam	Hurricane High School	Mandy Childers
4/17/2012	Putnam	Poca Middle School	Mandy Childers

Worksite of the Month

WV DOT/DOH -
Randolph County -
District 8
Headquarters Office
[Click Here](#)
[View Archive](#)

Quick Links

Select

Go

Enroll Your Worksite

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- » [Online Application](#)
- » [Support Letter](#)
- » [Worksite Criteria](#)
- » [Enrollment Letter](#)
- » [Success Stories](#)

Improve Your Score Discount

(continued)

For the plan year **2013**, ANY of the following:

- “green” score
- seeing their physician
- participating in PEIA’s Face to Face Diabetes Program
- participating in the PEIA Weight Management Program
- participating in the Dr. Ornish Program for Reversing Heart Disease
- participating in the Ornish Spectrum education program

Living Will Discount

- \$4 per month off the standard health insurance premium for active and retired health policyholders
- PEIA PPB Plans, Special Medicare Plan or the Humana Medicare Advantage plan
- Completed one of these forms:
 - WV Living Will Form (or form for your state of residence)
 - WV Medical Power of Attorney form
 - WV Combined Living Will and Medical Power of Attorney form
 - Five Wishes form (Aging with Dignity for \$5 per copy call 1-888-594-7437)
 - Appropriate form for out-of-state residents
- DO NOT mail the actual form to PEIA

Leaves of Absence

- For non-Worker's Compensation medical, personal, and family leave approved by the employer, the employee may continue coverage
- For personal leave, the monthly premium is paid as established by employer
- For non-Worker's Compensation medical leave, monthly documentation (physician's statement) to the employer is required, and employer is obligated to pay their portion only for a period of one year
- For Worker's Compensation leave, the employer is required to pay their portion of the premium for as long as the employee is on Worker's Compensation

Leaves of Absence

- The employer must hold open the position when the employee is on leave
- If the employee fails to pay their portion of the premium, employer may terminate coverage
- A leave is NOT a qualifying event allowing changes to coverage
- If out of area while on leave, the policyholder should contact Wells Fargo TPA (if coverage is through a PPB Plan) with their new/temporary address so that their network is transferred to that area

Retirement

- Last employer immediately prior to retirement is a participating employer in the PEIA Plan and employee must meet the minimum eligibility requirements of the State retirement system or a PEIA-approved retirement system in order to continue health and life benefits into retirement
- Education employees who participate in a non-state retirement system such as TIAA- CREF or similar plans must meet the minimum eligibility requirements of the State Teachers Retirement System
- Retiring employee and their dependent(s) must re-enroll as a retiree during the month of retirement or two months following in order to continue health and/or life benefits
- Employees who participate in an approved non-state retirement system must meet the minimum eligibility requirements of the public Employees Retirement System

Retirement (continued)

- Non-Medicare retirees continue in their current health plan until the next open enrollment, when they have the same open enrollment rights as active employees
- PPB Plan Member Medicare retirees who retire during a plan year, and retired employees who become Medicare eligible during the plan year, are transferred to PEIA's Special Medicare Plan for the remainder of that plan year; at the beginning of the following plan year, members will be transferred from the Special Medicare Plan to PEIA's Medicare Advantage Plan
- HMO Plan Member Medicare retirees may be transferred to the Special Medicare Plan or choose to stay in the HMO
- Participants in the Special Medicare Plan have Original Medicare parts A & B as their primary coverage, and their secondary medical and prescription claims are paid by Wells Fargo TPA and Express Scripts, Inc.

Termination of Coverage for Retirees

- **Retiring Employees**— coverage terminates at the end of the month in which an employee ceases active employment unless the employee re-enrolls for coverage as a retiree during the month of retirement or the following two months.
- **Retired Employees**— Non-Medicare retirees who elect to no longer participate in PEIA will be covered until the end of the month in which they choose to cease participation provided they have a qualifying event; if there is not a qualifying event, they cannot cease coverage until the next open enrollment period. Medicare retirees who elect to no longer participate in PEIA will be covered until the end of the month in which they choose to cease participation.

Special Retirement Situations

- Deferred retirement – If an employee separates from employment before retirement from a participating employer under the State retirement plan, he or she can not enroll as a retiree in a PEIA plan if they had other private sector employment just prior to retirement. To be eligible for PEIA, the employee's last employer immediately prior to retirement must have been a public entity that participates in the State retirement systems or a PEIA-approved retirement system, **and** in the PEIA Plan.
- Returning to active employment with a participating agency after retirement will cause a loss of the right to use accrued annual/sick leave toward extended employer-paid PEIA coverage except in the case where the employee participated in the plan prior to July 1, 2001 and becomes re-employed with a participating agency within two years of their retirement; in that case, the employee may apply accrued leave earned after re-employment to extend employer-paid benefits after retiring from the new position.

Special Retirement Situations (cont.)

- An employee with 20 years service who separates from a public entity prior to retirement may enroll in PEIA health benefits for up to two years following separation and will be required to pay 105% of their premium until such time as they meet eligibility requirements as a full retiree.
- An employee who is granted disability retirement by a state retirement system or who receives Social Security disability benefits may continue coverage in the PEIA Plan as a retired employee if they meet the minimum eligibility rules of the applicable state retirement system; premiums are at the 25 years or more of service level for these retirees.

Extending Employer-Paid Coverage

- When an employee moves directly from active public employment into a State or PEIA-approved retirement system, they may be eligible to extend employer-paid insurance upon retirement depending upon the employer.
 - Not available to any one hired on or after July 1, 2001.
 - Elected public officials are not eligible for this benefit.
 - If an employee defers retirement, they cannot defer accrued sick or annual leave to use later.
- Certain employees have the option to use accrued sick/annual leave to increase their retirement benefits or to extend their employer-paid insurance coverage.
 - Accrued leave can be used to increase years of service for pension or to extend insurance coverage, but accrued leave may not be divided between the two options.
 - The election of how to apply the accrued leave cannot be revoked.

Extending Employer-Paid Coverage

(State agencies, county boards of education, other eligible employees)

- The amount of the employer-paid insurance coverage which can be received depends upon when the employee came into the PEIA plan:
 - **Before July 1, 1988:**
 - 2 days of accrued leave = 100% of one month's premium for single coverage
 - 3 days of accrued leave = 100% of one month's premium for family coverage
 - **Between July 1, 1988 and June 30, 2001:**
 - 2 days of accrued leave = 50% of one month's premium for single coverage
 - 3 days of accrued leave = 50% of one month's premium for family coverage
 - **On or After July 1, 2001:**
 - Not eligible for extended employer-paid insurance upon retirement
 - **If there is a lapse in coverage after July 1, 2001:**
 - Not eligible for extended employer-paid insurance upon retirement

Other Benefits for Retirees

- Basic Life Insurance
 - decreases at specific ages and at retirement
 - retiree pays the premium
 - if retiree has extended employer-paid insurance they will pay the premium once the extended coverage is exhausted
- Optional/Dependent Life
 - maximum amount available is \$150,000
 - to increase the amount of coverage at retirement, policyholder must complete and submit the Evidence of Insurability Application for Coverage within the month or retirement or the two following months
 - the life insurance carrier must approve the increase
 - To carry the same or to decrease the amount of coverage at retirement, no medical information is required

Privacy Practices

- HIPAA applies to personal health information that is identifiable - including names and addresses.
- Information may be received from policyholder, physicians, hospitals, and others providing health care services
- Information must be kept confidential
- Information is used to:
 - provide benefits
 - assist healthcare professionals in providing treatment
 - make claim payments
 - provide customer service to policyholders
 - other reasons as listed on pages 104 to 105 of the Summary Plan Description

Privacy Practices

(continued)

- US Department of Health & Human Services Office of Civil Rights
Minimum Necessary Standard
 - When using, disclosing, or requesting PHI (Personal Health Information), reasonable efforts must be made to use, disclose, or request only the **minimum amount necessary for the intended purpose**
 - The Coordinator should only gather the **minimum** information necessary to complete the function/form
 - Forms should be completed and submitted with necessary documentation but **no additional attachments** (post-it notes, marginal notes, etc.)

Notes / Q & A
