

## RETIREMENT BENEFITS ELIGIBILITY GUIDELINES

General guidelines regarding eligibility are:

- a) Must have completed ten (10) full-time years during which time a District contribution has been made to a group plan.
- b) Must have continuous (no breaks) service (exceptions are such conditions as medical leave and layoff) for the last ten (10) years **or** have been employed by San Jose Unified School District (SJUSD) twenty (20) or more years.
- c) Must be retiring from active service (service retirement).
- d) The Human Resources office will make final eligibility approval.
- e) Retirees have the same option as regular employees during the Open Enrollment period.
- f) Kaiser members who move out of the service area can change medical plans at the time of move to the Foundation plan with no break of coverage.

If you believe you are eligible, you must complete an application form and return it to the Human Resources/Employee Services Department.

\*\*The contribution plan is as follows:

- a) At least 55 years, but under 65 years, \$80/month.
- b) 65 years and over, \$35/month.
- c) If a PERS member retires from age 50-55, retiree pays full premium until 55.
- d) If a CalSTRS member retires under the normal retirement age of 60, they can not work in any CalSTRS-related service for the first six calendar months after they retire.

Certain positions for the purposes of retiree benefits may be deemed eligible although the position is less than eight hours per day. In this case, the amount of the contribution is prorated.

Effective July 1, 1993, the Board of Education approved modification to this plan as follows:

- a) Credit will be given toward the Foundation premium for Medicare coverage: \$30/month for Part B only, \$45/month for Parts A & B. Additional (same increment) is given for an eligible spouse.
- b) At age 65, a Foundation retiree and their spouse must purchase Medicare Part B.

The contribution plan is annually subject to Board approval.

The District policy states that if any insurance plan is terminated, it cannot be reinstated unless the Retiree is continuously covered as a dependent on the District plan under another Employee or Retiree.