
Retiree Health Reimbursement Program

Visual:

RETIREE HEALTH REIMBURSEMENT PROCESS:

STEP 1



CalPERS deducts the full medical premium from Retiree's pension amount, less the City's minimum contribution.

STEP 2



Outside reimbursement administrator issues a check/direct deposit to reimburse Retiree on a monthly basis.

STEP 3



CalPERS Retiree (warrant) check is deposited and paid to Retiree on a monthly basis.

Contacts:

CalPERS Headquarters

Address:

Lincoln Plaza North 400 G St.
Sacramento, CA 95811

Contact Center:

888 CalPERS (or 888-225-7577)

Business Hours: Mon-Fri, 8am-5pm

The Advantage Group (TAG)

Address:

43471 Ridge Park Drive, Suite B
Temecula, CA 92590

Phone Employees/Members:

877-506-1660

Email: support@enrollwithtag.com

End of Year Process:

- 1) Reimbursement administrator will mail substantiation form to retiree.
- 2) Complete substantiation form and mail to reimbursement administrator directly.

City Share of Healthcare Premium

Retiree Health Benefit:

Retiree health benefit levels are negotiated in labor agreements. Currently, labor agreements break down retiree medical benefits by groups according to the hire date, retirement date, and employee group at the time of retirement. To review what retiree medical group you are in, please see the Retiree Medical Matrix on our webpage here: https://www.cityofpaloalto.org/gov/depts/human_resources/retirees/default.asp

Background:

Contracting agencies are required to provide an employer health contribution toward the cost of the monthly premium for all eligible employees and annuitants. PEMHCA requires minimum contribution amounts and allows for various contribution methods. [Contact CalPERS](#) to discuss the options available to you.

Revised 06/2020

The Health premium reimbursements for May 2011 through August 2011 were processed directly by the City. On August 1, 2011, the City entered into a contract with an outside vendor for overall monthly administration of the retiree reimbursement program including reviewing, calculating, and processing reimbursements.