


# Title: Exemption from the retiree deferral form requirement

## PEBB Program Administrative Policy 21-1

<b>Contact:</b>	Policy and Rules Coordinator, ERB Division	<b>Effective:</b>	January 1, 2023
<b>Associated RCW:</b>	41.05.080	<b>Owner:</b>	Policy, Rules, & Compliance Manager, ERB Division
<b>Associated PEBB Board Policy Resolutions:</b>	PEBB Policy Resolution 2022-04	<b>Approved by:</b>	
<b>Associated WAC:</b>	182-08-197 182-12-109 182-12-171 182-12-180 182-12-200 182-12-205 182-12-265	<b>Position:</b>	Director of the PEBB Program
<b>Assoc. fed law/reg:</b>		<b>Date approved:</b>	August 24, 2022
<b>Associated Forms &amp; Communication</b>	<p>Forms:</p> <ul style="list-style-type: none"> <li>• PEBB Retiree Election Form (form A) 51-4031</li> <li>• PEBB Retiree Change Form (form E) 51-0007</li> </ul> <p>Publication:</p> <ul style="list-style-type: none"> <li>• Retiree Enrollment Guide HCA 51-0205</li> </ul> <p>PEBB Website:</p> <ul style="list-style-type: none"> <li>• Deferring Coverage</li> </ul> <p>Pers/Pay Extranet:</p> <ul style="list-style-type: none"> <li>• PEBB Retiree Health Insurance Checklist</li> </ul>		

### Purpose:

This policy exempts certain retirees from the “deferral form requirement” under WAC 182-12-171 (1)(d), 182-12-180 (3)(d), 182-12-205 (4)(a), and 182-12-265 (1), (2), and (3). Under the procedural “deferral form requirement,” the retiree must submit a PEBB Retiree Election Form (form A) or a PEBB Retiree Change Form (form E) requesting deferral within the required time frame.

The exemption applies to certain retirees who are not required to submit a form and all retirees during the first year of implementation, in 2001, when the new form was not consistently available.

WAC 182-12-109: "Subscriber" means the employee, retiree, continuation coverage enrollee, or survivor who has been determined eligible by the PEBB Program, employer group, or state agency, is enrolled in PEBB benefits, and is the individual to whom the PEBB Program and contracted vendors will issue all notices, information, requests, and premium bills on behalf of an enrollee.

**Policy:**

1. A subscriber is exempt from the deferral form requirement under the following circumstances:
  - a. A retiring employee, a retiring school employee, or a retiree enrolled as a dependent in a health plan sponsored by Public Employees Benefits Board (PEBB), a Washington state educational service district, or School Employees Benefits Board (SEBB) as described in WAC 182-12-200;
  - b. The retiree met all procedural and substantive eligibility requirements between January 1, 2001 and December 31, 2001, as described in WAC 182-12-205(5);
  - c. The subscriber transitioned from one type of medical coverage to another type of medical coverage as described in WAC 182-12-205 (3)(a) through (e). To be eligible for this exemption, the subscriber must have met all procedural and substantive eligibility requirements when they first deferred enrollment in PEBB retiree insurance coverage under WAC 182-12-205; or
  - d. When a retiree becomes eligible for the employer contribution toward PEBB benefits, PEBB retiree insurance coverage will be automatically deferred by the PEBB Program. When a subscriber is no longer eligible for the employer contribution toward PEBB benefits, they must enroll or defer PEBB retiree insurance coverage as described in WAC 182-12-171, 182-12-200, or 182-12-205.
2. A subscriber who qualifies for exemption from the deferral form requirement in (1) must meet all other applicable requirements in WAC 182-12-180, 182-12-200, 182-12-205, and 182-12-265 to be eligible to enroll in a PEBB health plan after deferral.