

# LIVE VIRTUAL BOARD MEETING



TO VIEW VIA WEB



TO PROVIDE PUBLIC COMMENT

You may submit a request to speak during Public Comment or provide a written comment by emailing [PublicComment@lacera.com](mailto:PublicComment@lacera.com). If you would like to remain anonymous at the meeting without stating your name, please let us know.

**Attention:** Public comment requests must be submitted via email to [PublicComment@lacera.com](mailto:PublicComment@lacera.com).

LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION  
300 N. LAKE AVENUE, SUITE 650, PASADENA, CA

A REGULAR MEETING OF THE BOARD OF RETIREMENT  
LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION

300 N. LAKE AVENUE, SUITE 810, PASADENA, CA

9:00 A.M., WEDNESDAY, JUNE 2, 2021\*

This meeting will be conducted by the Board of Retirement by teleconference under the Governor's Executive Order No. N-29-20.

Any person may view the meeting online at  
[https://members.lacera.com/lmpublic/live\\_stream.xhtml](https://members.lacera.com/lmpublic/live_stream.xhtml)

*The Board may take action on any item on the agenda,  
and agenda items may be taken out of order.*

- I. CALL TO ORDER
- II. APPROVAL OF MINUTES
  - A. Approval of the Minutes of the Regular Meeting of May 5, 2021
- III. PUBLIC COMMENT

(Written Public Comment - You may submit written public comments by email to [PublicComment@lacera.com](mailto:PublicComment@lacera.com). Correspondence will be made part of the official record of the meeting. Please submit your written public comments or documentation as soon as possible and up to the close of the meeting.

Verbal Public Comment - You may also request to address the Committee. A request to speak must be submitted via email to [PublicComment@lacera.com](mailto:PublicComment@lacera.com). We will contact you with information and instructions as to how to access the meeting as a speaker. If you would like to remain anonymous at the meeting without stating your name, please let us know.)
- IV. OTHER COMMUNICATIONS
  - A. For Information
    - 1. April 2021 All Stars
    - 2. Chief Executive Officer's Report  
(Memo dated May 24, 2021)

V. CONSENT ITEMS

- A. Ratification of Service Retirement and Survivor Benefit Application Approvals. (Memo dated May 25, 2021)
- B. Recommendation as submitted by Shawn Kehoe, Chair, Operations Oversight Committee: That the Board approve to move our current mainframe technology to a hosted, multi-tenant platform, while LACERA prepares to move to a server-based solution and authorize LACERA to enter into a contract for such services with Mainline Information Systems partnered with Data Management, Inc. at a one-time cost of \$15,000, and an annual cost of \$342,000. (Memo dated May 20, 2021)

VI. ITEMS EXCLUDED FROM CONSENT ITEMS

VII. NON-CONSENT ITEMS

- A. Recommendation as submitted by Santos H. Kreimann, Chief Executive Officer: That the Board consider and approve the proposed strategic planning process and timeline and authorize staff to issue a Request for Proposal (RFP), evaluate the responses to the RFP, and select a Strategic Planning consultant to assist LACERA in developing and implementing a sustainable and ongoing Strategic Planning process. (Memo dated May 28, 2021)

VIII. REPORTS

- A. Presentation by Bob Lavigna from CPS HR Consulting and Roberta Van Nortrick, Training Coordinator/Project Manager, regarding the Employee Engagement Survey Results. (Memo dated May 17, 2021)
- B. For Information Only as submitted by Barry W. Lew, Legislative Affairs Officer, regarding Monthly Status Report on Legislation. (Memo dated May 24, 2021)
- C. For Information Only as submitted by Barry W. Lew, Legislative Affairs Officer, regarding an Update on SACRS 2021 Legislative Platform. (Memo dated May 19, 2021)

VIII. REPORTS (Continued)

- D. For Information Only as submitted by Ted Granger, Interim Chief Financial Officer, regarding the following reports:

Monthly Education and Travel Reports for April 2021

(Public Memo dated May 20, 2021)

(Confidential Memo dated May 20, 2021 – Includes Anticipated Travel)

3<sup>rd</sup> Quarter Education and Travel Expenditure Reports

(Memo dated May 20, 2021)

- E. For Information Only as submitted by Steven P. Rice, Chief Counsel, regarding the May 2021 Fiduciary Counsel Contact and Billing Report. (Memo dated May 26, 2021) (Privileged and Confidential Attorney-Client Communication/Attorney Work Product)

IX. ITEMS FOR STAFF REVIEW

- X. GOOD OF THE ORDER  
(For information purposes only)

XI. EXECUTIVE SESSION

- A. Potential Threats to Public Services or Facilities  
(Pursuant to Subdivision (a) of California Government Code Section 54957)

Consultation with: LACERA Chief Executive Officer - Santos H. Kreimann, Systems Division Interim Manager - Kathy Delino, Chief Information Security Officer - Bob Schlotfeldt, and Other LACERA Staff.

- B. Conference with Legal Counsel – Anticipated Litigation  
Significant Exposure to Litigation (Pursuant to Paragraph (2) of Subdivision (d) of California Government Code Section 54956.9)

1. Administrative Appeal of Everette Wade

XII. ADJOURNMENT

*\*Although the meeting is scheduled for 9:00 a.m., it can start anytime thereafter, depending on the length of the Committee meeting preceding it.*

*Documents subject to public disclosure that relate to an agenda item for an open session of the Board of Retirement that are distributed to members of the Board of Retirement less than 72 hours prior to the meeting will be available for public inspection at the time they are distributed to a majority of the Board of Retirement Members at LACERA's offices at 300 N. Lake Avenue, Suite 820, Pasadena, CA 91101, during normal business hours of 9:00 a.m. to 5:00 p.m. Monday through Friday.*

*Requests for reasonable modification or accommodation of the telephone public access and Public Comments procedures stated in this agenda from individuals with disabilities, consistent with the Americans with Disabilities Act of 1990, may call the Board Offices at (626) 564-6000, Ext. 4401/4402 from 8:30 a.m. to 5:00 p.m. Monday through Friday or email [PublicComment@lacera.com](mailto:PublicComment@lacera.com), but no later than 48 hours prior to the time the meeting is to commence.*

MINUTES OF THE REGULAR MEETING OF THE BOARD OF RETIREMENT  
LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION

300 N. LAKE AVENUE, SUITE 810, PASADENA, CA

9:00 A.M., WEDNESDAY, MAY 5, 2021

This meeting was conducted by the Board of Retirement by teleconference under the Governor's Executive Order No. N-29-20.

PRESENT: Alan Bernstein, Chair

Vivian H. Gray, Vice Chair

Gina Zapanta, Secretary

JP Harris (Alternate Retired)

Shawn R. Kehoe

Keith Knox

Wayne Moore

Ronald Okum

William Pryor (Alternate Safety)

Les Robbins

Herman Santos

STAFF ADVISORS AND PARTICIPANTS

Santos H. Kreimann, Chief Executive Officer

John Popowich, Assistant Executive Officer

Johanna Fontenot, Interim Chief Counsel

Francis J. Boyd, Senior Staff Counsel

STAFF ADVISORS AND PARTICIPANTS (Continued)

Vincent Lim, Disability Litigation Manager

Allison E. Barrett, Senior Staff Counsel

Eugenia W. Der, Senior Staff Counsel

Jason E. Waller, Senior Staff Counsel

Ricki Contreras, Disability Retirement Manager

Tamara Caldwell, Disability Retirement Specialist Supervisor

Vickie Neely, Disability Retirement Specialist Supervisor

Kerri Wilson, Disability Retirement Specialist Supervisor

Hernan Barrientos, Disability Retirement Specialist Supervisor

Ricardo Salinas, Disability Retirement Specialist Supervisor

Amabelle Delin, Disability Retirement Specialist

Michelle Yanes, Disability Retirement Specialist

Angie Guerrero, Disability Retirement Specialist

Maria Muro, Disability Retirement Specialist

Anna Kwan, Disability Retirement Specialist

Nossaman LLP

Ashley Dunning, Partner

Peter Mixon, Partner

I. CALL TO ORDER

The meeting was called to order virtually by Mr. Bernstein at 9:00 a.m.

## II. APPROVAL OF MINUTES

- A. Approval of the Minutes of the Regular Meeting of April 7, 2021
- B. Approval of the Minutes of the Regular Meeting of April 15, 2021

Mr. Kehoe made a motion, Mr. Okum seconded, to approve the minutes of the regular meeting of April 7, 2021 and April 15, 2021. The motion passed (roll call) with Messrs. Knox, Santos, Okum, Moore, Kehoe, Robbins, Bernstein, Ms. Gray and Ms. Zapanta voting yes.

## II. PUBLIC COMMENT

There were no requests from the public to speak.

## III. OTHER COMMUNICATIONS

### A. For Information

#### 1. March 2021 All Stars

Mr. Popowich announced the winners for the month of March: Sarah Robles, Steve Salinas, Courtney Cook, and Scott Rhodes. Persian Petrov was recognized as the Web Watcher and Priscilla Hernandez was recognized as the Rideshare winner.

#### 2. Chief Executive Officer's Report (Memo dated April 26, 2021)

Mr. Kreimann provided an update to the Board regarding the recruitment of the Chief Operating Officer and Assistant Executive Officer.

## IV. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

### Safety Law Enforcement

### Service-Connected Disability Applications

On a motion by Mr. Robbins, seconded by Mr. Okum, the Board of Retirement



IV. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

Safety Law Enforcement (Continued)  
Service-Connected Disability Applications

approved a service-connected disability retirement for the following named employees who were found to be disabled for the performance of their duties and have met the burden of proof. The motion passed (roll call) with Messrs. Knox, Santos, Okum, Moore, Kehoe, Robbins, Bernstein, Ms. Gray and Ms. Zapanta voting yes.

<u>APPLICATION NO.</u>	<u>NAME</u>
451D	WAYNE P. WATERMAN
452D	ANDREA G. STELLA
453D	MICHAEL V. DAVIS
454D	RUTHIE V. DAILY
455D	TODD A. GRINCEWICH
456D	JASON P. AMES
457D*	ROOSEVELT JOHNSON
458D	HENRY SAUCEDO
459D	ALBA RODRIGUEZ
460D*	CHRISTOPHER M. BLASNEK
461D**	SONIA B. SERRANO
462D**	DJOKO I. VAN DAMME
463D**	JOHN R. SAGARDIA

\*Granted SCD – Employer Cannot Accommodate

\*\*Granted SCD – Retroactive

IV. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

Safety Law Enforcement (Continued)  
Service-Connected Disability Applications

<u>APPLICATION NO.</u>	<u>NAME</u>
464D	RICHARD W. BIDDLE
465D*	THOMAS J. ALBANESE (DEC'D)
466D	DENNIS P. GILL (DEC'D)
467D	MARK W. LINDSEY
468D	MICHAEL A. BARLOW

Safety Fire, Lifeguards  
Service-Connected Disability Applications

On a motion by Mr. Pryor, seconded by Mr. Okum, the Board of Retirement approved a service-connected disability retirement for the following named employees who were found to be disabled for the performance of their duties and have met the burden of proof. The motion passed (roll call) with Messrs. Knox, Santos, Okum, Moore, Kehoe, Robbins, Bernstein, Ms. Gray and Ms. Zapanta voting yes.

<u>APPLICATION NO.</u>	<u>NAME</u>
1349B	KEVIN R. KLAR
1350B	KEVIN R. FREYMOND
1351B	CHARLOTTE GRAHAM
1352B	ROBERT P. GOLDMAN

\*Granted SCD – Survivor Benefit

IV. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

General Members

Service-Connected Disability Applications

On a motion by Mr. Santos, seconded by Mr. Okum, the Board of Retirement made a motion to approve a service-connected disability retirement for the following named employees who were found to be disabled for the performance of their duties and have met the burden of proof. The motion passed (roll call) with Messrs. Knox, Santos, Okum, Moore, Kehoe, Robbins, Bernstein, Ms. Gray and Ms. Zapanta voting yes.

<u>APPLICATION NO.</u>	<u>NAME</u>
2213C*	BEATRIZ CARBONELL
2214C	JOSE A. GUERRERO
2215C	MARIA G. BANUELOS
2216C*	JOAN MARGARET R. ANDERSON
2217C*	JOVAN Y. VERDIN
2218C*	WAHEEDAH CARTER
2219C	CHRISTINA A. RAMIREZ
2220C	LOUISE R. DODSON
2221C**	JANETTE E. PANTOJA
2222C***	VICTORIA M. CHING
2223C*	RODNEY L. MORRIS

\*Granted SCD – Employer Cannot Accommodate

\*\*Granted SCD – Salary Supplemental

\*\*\*Granted SCD – Retroactive Employer Cannot Accommodate

IV. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

General Members (Continued)  
Service-Connected Disability Applications

<u>APPLICATION NO.</u>	<u>NAME</u>
2224C*	GABRIELA HERNANDEZ
2225C**	EDNA M. STRONG
2226C**	TACYE S. CONTRERAS
2227C***	ROSITA L. BRANNON
2228C**	2020-1MD

General Members  
Nonservice-Connected Disability Applications

On a motion by Mr. Santos, seconded by Ms. Gray, the Board of Retirement made a motion to approve a nonservice-connected disability retirement for the following named employee who was found to be disabled for the performance of her duties and has met the burden of proof. The motion passed (roll call) with Messrs. Knox, Santos, Okum, Moore, Kehoe, Robbins, Bernstein, Ms. Gray and Ms. Zapanta voting yes.

<u>APPLICATION NO.</u>	<u>NAME</u>
4403	KATHLEEN N. EALEY-TUTT

\* Granted SCD – Salary Supplemental

\*\*Granted SCD – Retroactive Employer Cannot Accommodate

\*\*\*Granted SCD – Employer Cannot Accommodate

V. CONSENT ITEMS

Ms. Gray made a motion, Mr. Okum seconded, to approve Consent Items A-F, except B. The motion passed (roll call) with Messrs. Knox, Bernstein, Okum, Moore, Kehoe, Robbins, Santos, Ms. Gray and Ms. Zapanta voting yes.

- A. Ratification of Service Retirement and Survivor Benefit Application Approvals. (Memo dated April 27, 2021)
- B. Recommendation as submitted by Joseph Kelly, Chair, Audit Committee: that the Board approve and adopt the revised Audit Committee Charter. (Memo dated April 27, 2021)

This Item will be agendaized at a future meeting pending additional information.

- C. Recommendation as submitted by Ricki Contreras, Division Manager, Disability Retirement Services: That the Board grant the appeal and request for an administrative hearing for applicant Christopher G. Joy. (Memo dated April 22, 2021)
- D. Recommendation as submitted by Les Robbins, Chair, Insurance, Benefits, and Legislative Committee: That the Board adopt a “Support” position on Assembly Joint Resolution 9, which would request the Congress of the United States to enact, and the President to sign, legislation that would repeal the Windfall Elimination Provision and Government Pension Offset from the Social Security Act. (Memo dated April 23, 2021)
- E. Recommendation as submitted by Les Robbins, Chair, Insurance, Benefits, and Legislative Committee: That the Board adopt a “Support” position on H.R. 82, which would enact the “Social Security Fairness Act of 2021.” (Memo dated April 23, 2021)
- F. Recommendation as submitted by Les Robbins, Chair, Insurance, Benefits, and Legislative Committee: That the Board direct its voting delegate to vote YES on sponsorship by the State Association of County Retirement Systems (SACRS) of Senate Bill 634 for the SACRS 2021 legislative platform. (Memo dated April 23, 2021)

## VI. REPORTS

- A. Presentation by Ashley Dunning, Partner and Peter Mixon, Partner of Nossaman LLP, regarding First Amendment Training - Free Speech Rights and Fiduciary Duties: A Governance Challenge for Retirement System Trustees. (California Continuing Legal Education (CLE) Credit Available) (Memo dated April 6, 2021)

Ashley Dunning and Peter Mixon provided a presentation to the Board and answered questions.

- B. For Information Only as submitted by Ricki Contreras, Division Manager, Disability Retirement Services, regarding the Application Processing Time Snapshot Reports. (Memo dated April 26, 2021)

This Item was received and filed.

- C. For Information Only as submitted by Barry W. Lew, Legislative Affairs Officer, regarding Monthly Status Report on Legislation. (Memo dated April 25, 2021)

This Item was received and filed.

- D. For Information Only as submitted by Ted Granger, Interim Chief Financial Officer, regarding the following reports:

Monthly Education and Travel Reports for March 2021

(Public Memo dated April 22, 2021)

(Confidential Memo dated April 22, 2021 – Includes Anticipated Travel)

This Item was received and filed.

- E. For Information Only as submitted by Steven P. Rice, Chief Counsel, regarding the April 2021 Fiduciary Counsel Contact and Billing Report. (Memo dated April 9, 2021) (Privileged and Confidential Attorney-Client Communication/Attorney Work Product)

This Item was received and filed.

## VII. ITEMS FOR STAFF REVIEW

The Board requested that Consent Item B, which refers to the revised Audit

VII. ITEMS FOR STAFF REVIEW (Continued)

Committee Charter be held until staff can clarify and review questions raised regarding the Procurement Policy and sole course agreements.

VIII. GOOD OF THE ORDER  
(For information purposes only)

Trustees and staff shared their condolences for the passing of Staff Counsel, Jill Rawal.

IX. DISABILITY RETIREMENT CASES TO BE HELD IN CLOSED SESSION

A. Applications for Disability

APPLICATION NO. & NAME

BOARD ACTION

5181B – JACQUELINE G. RAYES\*

Mr. Knox made a motion, Mr. Okum seconded, to grant a nonservice-connected disability retirement pursuant to Government Code Section 31720 and 31724 since the employer cannot accommodate. The motion passed (roll call) with Messrs. Knox, Santos, Okum, Moore, Kehoe, Robbins, Ms. Gray voting yes; and Mr. Bernstein abstaining. Ms. Zapanta was not present for the vote.

5182B – REX H. OPPENHEIMER

Ms. Gray made a motion, Mr. Okum seconded, to deny a service-connected disability retirement and find the applicant not permanently incapacitated since the employer can accommodate. The motion passed (roll call) with Messrs. Knox, Santos, Okum, Moore, Kehoe, Robbins, Bernstein, and Ms. Gray voting yes. Ms. Zapanta was not present for the vote.

\*Applicant Present

IX. DISABILITY RETIREMENT CASES TO BE HELD IN CLOSED SESSION

A. Applications for Disability

APPLICATION NO. & NAME

BOARD ACTION

5183B – CARLOS H. FERNANDEZ

Mr. Knox made a motion, Mr. Okum seconded, to deny a service-connected disability retirement and find the applicant not permanently incapacitated. The motion passed (roll call) with Messrs. Knox, Santos, Okum, Kehoe, Robbins, Bernstein, Ms. Gray voting yes, Mr. Moore voting no and Ms. Zapanta abstaining.

5103B – PHILIP D. WILKES\*

Mr. Kehoe made a motion, Mr. Okum seconded, to grant a nonservice-connected disability retirement pursuant to Government Code Section 31720. The motion passed (roll call) with Messrs. Knox, Santos, Okum, Moore, Kehoe, Robbins, Bernstein, Ms. Gray and Ms. Zapanta voting yes.

5145B – SHERRY S. AKHAVAN

Mr. Okum made a motion, Mr. Santos seconded, to grant a service-connected disability retirement pursuant to Government Code Section 31720 and 31724. The motion passed (roll call) with Messrs. Knox, Santos, Okum, Moore, Kehoe, Robbins, Bernstein, Ms. Gray and Ms. Zapanta voting yes.

5155B – ARNETTE A. WEST

Mr. Knox made a motion, Mr. Pryor seconded, to deny a service-connected disability retirement and find the applicant not permanently incapacitated and ineligible for a disability retirement. The motion passed (roll call) with Messrs. Knox, Santos, Okum, Moore, Kehoe,

\*Applicant Present



IX. DISABILITY RETIREMENT CASES TO BE HELD IN CLOSED SESSION

A. Applications for Disability

APPLICATION NO. & NAME

BOARD ACTION

5155B – ARNETTE A. WEST (Continued) Robbins, Bernstein, Ms. Gray and Ms. Zapanta voting yes.

B. Staff Recommendations

1. For Information Only as submitted by Ricki Contreras, Division Manager, Disability Retirement Services, regarding the 2021 Quarterly Reports of Paid Invoices – 1<sup>st</sup> Quarter. (Memo dated April 21, 2021)

This Item was received and filed.

X. ADJOURNMENT

There being no further business to come before the Board, the meeting was adjourned at 10:50 a.m.

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GINA ZAPANTA, SECRETARY

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ALAN BERNSTEIN, CHAIR



May 24, 2021

TO: Each Trustee,  
Board of Retirement  
Board of Investments

FROM: Santos H. Kreimann *SHK*  
Chief Executive Officer

SUBJECT: **CHIEF EXECUTIVE OFFICER'S REPORT – MAY 2021**

The following reflects the Chief Executive Officer's Report for May 2021 that highlights a few of the operational activities that have taken place during the past month, key business metrics to monitor how well we are meeting our performance objectives, and our educational calendar.

### **Planning for a Return to Work**

In April of 2020, LACERA closed the Member Service Center (MSC) as part of our efforts to protect LACERA staff members from the COVID-19 Pandemic. Staff quickly shifted gears, working collaboratively with Systems to develop new technologies allowing us to provide the same one-on-one counseling safely and securely as we provided in the MSC, only virtually. The team developed new procedures and trained staff on new technology applications at an accelerated pace. The virtual MSC has been a tremendous success serving more than 3,350 members since it went live.

With the COVID-19 vaccination program in full swing and LA County now in the Yellow Tier, and Governor Newsom considering re-opening California by mid-June, it is time for LACERA to begin our own re-opening process. Since the MSC closed, LACERA staff members in the Business Continuity Unit have been working with the Executive Office and Member Services to modify the MSC to allow us to re-open safely and securely. Modifications included updated cleaning protocols after each member visit and physical modifications to the lobby and the individual offices. All these modifications were in preparation for the day we could return to serving members in person.

We are pleased to announce a limited re-opening of the Member Service Center on July 6, 2021. We will begin opening up a small number of appointments and gradually increasing the number of in-person appointments throughout July and August in preparation for a full opening in September 2021.

There will be some changes to the way in which the MSC operates. We will no longer accept walk-in appointments. Several years ago, the MSC moved to an appointment-based service model, but we still allowed members to walk in and we would assist them as time permitted. This often led to long wait times for these members. We have elected to complete the transition to an appointment only service center. Members will be advised that we do not accept walk-ins and any members that do walk in will be offered assistance in setting up an appointment. Additionally, members will be advised to drop off documents using the drop-off mailbox just to the right of the main entrance to the building.

In addition, to the one-on-one meetings in the MSC, we will continue to offer the very popular virtual counseling sessions as well. All member workshops and seminars will continue to be held as webinars for the foreseeable future.

While the vaccination program has had tremendous success, we will continue with all the planned safety protocols we developed to address the pandemic. The physical modifications will remain, and staff will be required to follow all social distancing and cleaning protocols designed to protect both members and staff. Staff and members who visit the MSC will be required to wear a face mask at all times, and we ask all members to self-check their temperature and answer key COVID-19 risk prevention questions before entering the MSC.

### **California Reopening Update**

On March 4, 2020, Governor Newsom declared a State of Emergency related to the COVID-19 outbreak. He subsequently issued a series of Executive Orders to carry out his management and leadership responsibilities in dealing with the pandemic. In accordance with public health directives on social distancing, he issued Executive Order N-29-20 on March 17, 2020 to waive the requirements in the Brown Act related to the physical presence of a local agency's governing body, staff, and members of the public as a condition for holding public meetings. Consequently, many local agencies have held public meetings using videoconference and telephonic technology with limited in-person presence at the meeting location.

On April 6, 2021, Governor Newsom announced a plan to fully open California's economy on June 15, 2021, if there is a sufficient vaccine supply and hospitalization rates continue to be low and stable. His announcement indicated that "everyday activities will be allowed, and businesses can open with common-sense risk reduction measures." At this point, the details are not clear as to what the reopening means for the waiver of the Brown Act requirements and whether Executive Order N-29-20 will be rescinded as of June 15, 2021.

There will be two Board and committee meetings that will take place on June 16 and June 24, 2021. Staff in the Executive Office and Legal Office met with LACERA's state lobbyist, Joe Ackler, to discuss the issue of the reopening. It may be unlikely for there to be an abrupt transition back to the existing Brown Act requirements in June, but it may be prudent to plan for how the

July Board and committee meetings will take place, if the Executive Order were to be rescinded. Accordingly, we will modify our existing hybrid plan for the possibility of on-premises public meetings after June in which all Trustees and essential staff will be required to return to in-person meetings at the LACERA offices. Mr. Ackler will engage with the Governor's Office and legislative staff to keep us updated on any further developments and to advocate for a gradual transition for the reestablishment of the Brown Act public meeting requirements.

### **Retiree Healthcare "March Madness" Enrollment Update**

Each year over the Memorial Day weekend, LACERA mails out an Annual Letter and enrollment packet to retired members and survivors who are currently enrolled in one of the LACERA-administered healthcare plans.

This year, we have scheduled approximately 56,000 packets to be mailed out on May 28, 2021. The Annual Packet mailing will include the new 2021-2022 monthly healthcare premium rates effective July 1, 2021. In addition, the mandated or healthcare benefit changes approved by the Board of Retirement at the April meeting will be included in this packet. The mandated changes are contract changes required by the carrier to be in compliance with State regulatory agencies requirements, legal name change filed with the Department of Managed Care to Cigna's Medicare Advantage plan in Arizona, and required benefit changes in accordance to State law and/or health care legislation recently passed.

As a result of this mailing, we anticipate seeing our call volume increase by an additional 1,500 or more calls over the next month, as has occurred over the last couple of years.

We have included a copy of the Annual Packet with this report for your reference.

### **Update on Post COVID-19 Return to Office Planning**

Our Business Continuity team and the Executive Office continue to develop and refine plans to return staff to the office when it is safe to do so. The Business Continuity team is wrapping up a series of meetings with Division managers and developing individual plans tailored for each division. Our target goal is to begin having staff in the office on a regular basis beginning mid-September. The current plan is to have staff report to work on an alternating schedule with some time working remotely and some time working in the office. We will continually evaluate how this arrangement works and adjust over time.

## **COVID-19 Response Update**

The COVID-19 rate in Los Angeles County continues to decrease. Should this trend continue, and the number of vaccinations continues to rise, the June reopening date proposed by Governor Newsome will mark the end of many restrictions for Los Angeles County Residents.

LACERA had no confirmed positive COVID-19 results and only had one reported incident of a staff member exposure over the last month.

LACERA continues to follow the Public Health guidelines, including limiting the number of staff members physically in our offices daily. Based on the most recent numbers, we are averaging approximately 13% of our staff in the office on any given day. Again, efforts continue to be made to prepare the office for a safe return to work when conditions change.

The County has expanded the vaccination eligibility list to allow persons 16 and older to be vaccinated. Information has been shared with our staff and they have been provided information about vaccination clinics and have been provided with information about the ability to be vaccinated during working hours. Staff members who have been fully vaccinated can report that information to Human Resources if they choose to do so, but it is not required. As of the time of this memo, 5.7% (25 staff members) reported being fully vaccinated.

## **Recruitment Updates**

Our Human Resources team is currently in the process of running several promotional exams and open competitive exams to fill vacancies with the most qualified internal and external candidates. Finding the right candidates who will add value to the organization and help move us forward in meeting our goals is the top priority of our Human Resources Division. Here is an update on our current recruitment exams:

- Deputy Chief Executive Officer: An employment offer letter contingent upon the successful candidate passing a background check has been executed by both parties. I plan to provide more information about the candidate to the Board under a separate cover letter early next week once all the contract terms and a start date is finalized.
- Assistant Executive Officer: Alliance Resources Consulting conducted the search for the Assistant Executive Officer, which concluded on May 14, 2021. Alliance will conduct the first-level screening and provide a list of qualified candidates.
- Retirement Benefits Specialist (RBS) III: This is to fill seven (7) vacancies in Benefits and Member Services. Applications were accepted through May 5, 2021 and candidates are undergoing the examination process.

- Competitive candidates are encouraged to apply for the following recruitments. The recruiting period will remain open until a pool of qualified applications are received.
  - Senior Accountant
  - Media Artist
  - Senior Disability Retirement Specialist
  - Procurement and Supply Clerk
  
- Financial Analyst III: Interested candidates should submit their resumes for consideration.

### **Labor Negotiations Update**

LACERA issued a Request for Proposal (RFP) on March 30, 2021 soliciting Labor Negotiation services. Six firms submitted proposals by the April 20, 2021 deadline. The RFP evaluation committee interviewed four qualified firms and made a recommendation to the CEO. LACERA will start its pre-negotiation preparation in anticipation of successful negotiations with our labor partners at SEIU.

SHK: jp  
CEO report May 2021.doc

Attachments

June 2021

Dear LACERA Member:

The 2021 – 2022 benefits plan year is almost here! This packet contains important information about your LACERA-administered retiree healthcare plans:

- ***Retiree Healthcare Benefits Update*** — what's new for 2021 – 2022. Periodically, there are regulatory changes that require modifications to some of the benefits offered by your LACERA-administered health plans. This year, the changes are minimal. Please read the enclosed *Benefits Update* carefully to learn about these important changes. Please note, you do not have to take any action unless you want to make changes to your current LACERA-administered healthcare coverage.
- ***Retiree Healthcare Benefits Guide*** — an overview of the health plans available to you and important details about your LACERA-administered healthcare benefits.
- ***Tier 1 and Tier 2 Monthly Premium Rates Booklet*** — 2021 – 2022 monthly contribution rates for LACERA-administered health plans, effective July 1, 2021. (If you're enrolled in a Kaiser plan outside of California or the Cigna Preferred with Rx plan in Phoenix, Arizona, you'll receive a separate mailing from LACERA.)

For the upcoming plan year, the premiums for LACERA-administered health plans are increasing by an average of 1.2%. The premium increase will vary by plan, so some members will experience a higher increase than average, while others will experience a lower increase. Please review this booklet for your new monthly contribution rates for 2021 – 2022.

- ***Notice of Creditable Coverage*** — an official statement that your LACERA-administered medical plan provides you with prescription drug coverage that is, on average, as good as or better than the coverage offered by the Medicare Part D standard plan. As a participant in the LACERA-administered Retiree Healthcare Benefits Program, you should not enroll in non-LACERA Medicare Part D plans for the following reasons:
  - **Non-Medicare Eligible Retirees:** All LACERA-administered plans offer prescription drug coverage that is, on average, as good as or better than that available through Medicare.

*(please see reverse)*

- **Medicare Eligible Retirees and Dependents:** This notice does not apply to you. The coverage you are enrolled in through LACERA is a Medicare Plan. As you are already enrolled in a Medicare plan, you do not have to do anything.

**Enrolling in a non-LACERA Medicare Part D plan may jeopardize your LACERA medical plan.**

As you're learning about what's new for your health plans in the coming new plan year, it's also a good idea to see what health and wellness programs your health plans offer. All of the LACERA-administered health plans offer Disease Management Programs — these programs offer support for the management and prevention of many common medical conditions, such as hypertension, congestive heart failure, and diabetes. Remember, the care of your health is in *your* hands. LACERA-administered health plans offer you the tools to take control.

Through LACERA, you also have access to *Staying Healthy Together*, a series of health-related programs and workshops that provide information, tools, and resources to help you make healthy decisions in your life. Every six months, the program focuses on a new health-related topic. You can explore each topic by reading the “Staying Healthy Together” section of LACERA’s *Spotlight* newsletter and attending a *Staying Healthy Together* workshop with other retirees. Visit [www.lacera.com/healthcare/StayingHealthyTogether](http://www.lacera.com/healthcare/StayingHealthyTogether) to learn more and explore links to other health-related websites.

LACERA and the Board of Retirement will continue this year, as every year, to ensure cost-effective, high-quality, and comprehensive coverage for our retirees.

Sincerely,



Santos H. Kreimann  
Chief Executive Officer

Enclosures:

*Retiree Healthcare Benefits Update*  
*Retiree Healthcare Benefits Guide*  
*Monthly Premium Rates Booklet*  
*Notice of Creditable Coverage*





# Retiree Healthcare Benefits UPDATE

## Kaiser Permanente Members (outside California) and Cigna Preferred with Rx Members (Phoenix, Arizona)

For those enrolled in Kaiser Permanente outside California (Kaiser – Colorado, Kaiser – Georgia, Kaiser – Hawaii, Kaiser – Oregon, Kaiser – Washington), plan changes and rates are determined by the Kaiser Permanente region in which you reside. You will receive a separate mailing from LACERA.

Those enrolled in Cigna Preferred with Rx, Phoenix, Arizona will also receive a separate mailing from LACERA.

## PRIVACY NOTICE REMINDER

The Health Insurance Portability and Accountability Act (HIPAA) of 1996 requires health plans to comply with privacy rules. These rules are intended to protect your personal health information from being inappropriately used and disclosed. The rules also give you additional rights concerning control of your own healthcare information.

This Plan's HIPAA Privacy Notice explains how the group health plan uses and discloses your personal health information. You are provided a copy of this Notice when you enroll in the Plan. You can get a copy of the HIPAA Privacy Notice (LACERA Retiree Healthcare) from the LACERA website at [www.lacera.com/healthcare/healthcare.html](http://www.lacera.com/healthcare/healthcare.html).

## IMPORTANT MEDICARE PART D NOTICE

If you are a **Non-Medicare Eligible Retiree**, included in this packet is your **Medicare Part D Notice of Creditable Coverage (NOCC)**. (Medicare Eligible Retirees and Dependents: This notice does not apply to you.)

- *What it is:* An official statement that your LACERA-administered medical plan provides you with prescription drug coverage that is, on average, as good as or better than the coverage offered by the Medicare Part D model plan.
- *What to do with it:* Read it and keep it in a safe place.
- *Why it is important:* If you later decide to enroll in a Medicare Part D plan outside of the LACERA-administered plans, showing your NOCC will prevent you from paying a penalty for late enrollment in Medicare Part D.
- *If you misplace it:* You may download a copy of the NOCC from LACERA's website at [www.lacera.com/healthcare/pdf/new\\_retiree\\_packet/nocc.pdf](http://www.lacera.com/healthcare/pdf/new_retiree_packet/nocc.pdf), or contact LACERA's Retiree Healthcare Division at (800) 786-6464 and press 1, or (626) 564-6132, or email LACERA at [healthcare@lacera.com](mailto:healthcare@lacera.com).

### Two Important Things to Remember!

- You should not enroll in another Medicare Part D plan. Please consult with LACERA first if you are thinking of enrolling in another plan.
- If you are enrolled in a Medicare Part D plan not offered through LACERA, please contact LACERA immediately. The Centers for Medicare & Medicaid Services (CMS) will not allow you to be enrolled in two prescription drug plans, and your coverage with LACERA may be jeopardized.

## June 2021

This *Benefits Update* provides information about:

- Retiree Healthcare Premium rates that will become effective July 1, 2021.
- Changes to LACERA's Retiree Healthcare Benefits Program for the 2021 – 2022 plan year.

If you have any questions about the information in this *Benefits Update*, please contact LACERA's Retiree Healthcare Division at (800) 786-6464 and press 1, or (626) 564-6132, or by email at [healthcare@lacera.com](mailto:healthcare@lacera.com).

## Do You Need to Take Action?

Your current LACERA-administered healthcare coverage will continue for the upcoming plan year unless you actively make changes. **You do not have to take any action unless you want to make changes to your current LACERA-administered healthcare coverage.**

## Premium Rate Changes for 2021 – 2022

On July 1, 2021, overall premiums will increase by an average of 1.2%. This means that some plans and coverage levels will experience a higher increase than the average, while others will experience a lower increase. Please refer to the enclosed *Monthly Premium Rates Booklet* for your 2021 – 2022 rates. **If you are enrolled in Kaiser Permanente outside of California or Cigna Preferred with Rx (Phoenix, Arizona), you will receive a separate mailing from LACERA.**

## Plan Changes for 2021 – 2022

Changes to your benefits for the 2021 – 2022 plan year are minor. This means you will continue to have access to most of the same benefits and levels of coverage you have now. There are, however, a few changes that will take effect July 1, 2021. Some of these changes are described in this document.

## Los Angeles County Retiree Healthcare Benefits Program—Tier 2

As authorized by the Los Angeles County Board of Supervisors on June 17, 2014, and previously communicated, County employees hired after June 30, 2014 who are eligible for LACERA membership will participate in the **Los Angeles County Retiree Healthcare Benefits Program – Tier 2**. This program offers benefits covering medical, hospital, and dental/vision services to County retirees and their eligible dependents. The County retiree **medical and dental/vision subsidy** applies only to **retiree-only coverage**. If you enroll dependents, you will pay the difference on any monthly premium that exceeds the retiree-only benchmark amount. The LACERA-administered Retiree Healthcare Benefits Program provided to current retirees and members hired prior to July 1, 2014 are protected and remain unchanged.

For more details about the Tier 2 Program, please refer to the Retiree Healthcare Benefits Guide, or go to [www.lacera.com/healthcare/RHC-Tier2.html](http://www.lacera.com/healthcare/RHC-Tier2.html).



The information below summarizes the key changes to LACERA's medical plans effective July 1, 2021. This is not intended to be a comprehensive list of all 2021 – 2022 plan changes. For more details, see your healthcare plan documents, or contact your carrier.

## Anthem Blue Cross Prudent Buyer Plan and Plans I, II and III

For all Anthem plans, no changes beyond mandated contractual changes have been made to the plan design. For more details, see your Anthem healthcare plan documents or LACERA Summary of Benefits book. You may also contact Anthem Blue Cross to request one.

## Cigna Preferred with Rx Plan (Phoenix, AZ)

The plan name has changed to Cigna Preferred with Rx (previously Cigna-HealthSpring Preferred Rx). Cigna will be sending new ID cards to Cigna Preferred with Rx Plan members reflecting the name change. Those enrolled in this plan will also receive a separate mailing from LACERA.

### ■ Prescription Drugs

- Initial Coverage Limit: \$4,130 (once you reach this limit, you continue to pay your cost share until you reach the Catastrophic Phase)
- Catastrophic Phase Begins: \$6,550 in true out-of-pocket costs (TrOOP)
- Standard Catastrophic Member Cost Share — once you reach the Catastrophic Phase, you pay:
  - Generic Drugs (including brand-name drugs treated as generic): greater of \$3.70 or 5%
  - All Other Drugs: greater of \$9.20 or 5%

## Cigna Network Model Plan

Please note that no changes beyond mandated contractual changes have been made to the plan design. For more details, see your Cigna healthcare plan documents or LACERA Summary of Benefits book. You may also contact Cigna to request one.

## Cigna Dental/Vision Plans

Please note that no mandated contractual changes have been made to the dental and vision plans.

## Kaiser Permanente Senior Advantage

Please note that no changes beyond mandated contractual changes have been made to the plan design. For more details, see your Kaiser Permanente plan documents or LACERA Summary of Benefits book. You may also contact Kaiser to request one.

## Kaiser Permanente HMO

Please note that no changes beyond mandated contractual changes have been made to the plan design. For more details, see your Kaiser Permanente plan documents or LACERA Summary of Benefits book. You may also contact Kaiser to request one.

## UnitedHealthcare® Group Medicare Advantage

Benefit changes include:

### ■ Prescription Drugs

- Initial Coverage Limit: \$4,130 (once you reach this limit, you continue to pay your cost share until you reach the Catastrophic Phase)
- Catastrophic Phase Begins: \$6,550 in true out-of-pocket costs (TrOOP)
- Standard Catastrophic Member Cost Share — once you reach the Catastrophic Phase, you pay:
  - Generic Drugs (including brand-name drugs treated as generic): greater of \$3.70 or 5%
  - All Other Drugs: greater of \$9.20 or 5%

## UnitedHealthcare HMO

Please note that no changes beyond mandated contractual changes have been made to the plan design. For more details, see your UnitedHealthcare plan documents or LACERA Summary of Benefits book. You may also contact UnitedHealthcare to request one.

## SCAN Health Plan

Benefit changes include:

### ■ BrainHQ

- A brain fitness program application that strengthens your mind through games that focus on attention, memory, brain speed, intelligence, navigation, and people skills exercises
- \$0 copay
- To start using BrainHQ, please go to scan.brainhq.com.
- For additional questions, call 1-888-844-6598 (TTY: 711), Monday through Friday, 7:30 a.m. - 4 p.m.

### ■ Health Tech

- A technology support line that provides training and education on how to use a computer or tablet to access medical care, BrainHQ, and/or information
- \$0 copay
- To access technology support assistance, please call 1-833-437-0555 (TTY: 711), 24 hours a day, 7 days a week

### ■ Prescription Drugs

- 3-Month Supply extended to 100 days, both Retail and Mail Order
- Catastrophic Phase Begins: \$6,550 in true out-of-pocket costs (TrOOP)
- Standard Catastrophic Member Cost Share — once you reach the Catastrophic Phase, you pay:
  - Generic Drugs: greater of \$3.70 or 5%
  - Brand-Name Drugs: greater of \$9.20 or 5%

## Two Ways to Save Money and Time on Prescriptions

There are many ways to save money—and make your life easier when filling prescription drugs. Generic prescription drugs and electronic prescriptions (or e-prescriptions) may both make a big difference.

### 1. Switch to Generic Drugs

Generic drugs often cost less than their brand-name equivalents – saving you money.

Why the cost difference? When prescription drug patents expire, generic equivalents become available at a lower cost because more companies can manufacture them.

Ask your doctor if a generic equivalent is available and right for you. You can also contact your individual medical plan providers for specific information about their prescription drug list.

### 2. Save Time with Electronic Prescriptions

Instead of using paper prescriptions, many doctors today are sending prescriptions to pharmacies electronically. It may be a faster, more efficient, and more accurate way to get your prescriptions filled.

How does it work? It's simple:

1. Your doctor sends the prescription electronically to your local pharmacist.
2. The pharmacist sees it on his or her computer within minutes and fills it for you. Your claim is automatically submitted to your insurance carrier, setting in motion a reimbursement payment to you, based on your plan benefits.
3. You pick up your prescription at the pharmacy.

By working with your doctor and pharmacy, you can take full advantage of potential prescription discounts and conveniences. If you have any questions, please contact your LACERA-administered health plan directly.

# Retiree Healthcare Benefits GUIDE

This *Benefits Guide* presents an overview of the LACERA-administered health plans, details about administrative rules and procedures, and insurance carrier contact information. For information about premium rates and important plan changes for the 2021 – 2022 plan year, please refer to the *Benefits Update* and *Monthly Premium Rates Booklet* included in this packet.

## Disease Management Programs

Disease Management Programs help LACERA members with certain chronic conditions (for example, hypertension, congestive heart failure, diabetes) to take advantage of support, tools, and information to help them manage their diseases. These programs also help LACERA fulfill one of its long-standing objectives regarding our members: to give you the tools you need to enjoy the best possible quality of life. All LACERA-administered medical plans have Disease Management Programs as part of their benefits. If you have a chronic disease, call your plan to learn how you can participate — your health is in your hands!

- **If you are in an HMO:** Call your HMO at the number listed at the back of this *Benefits Guide*.
- **If you are in Anthem Blue Cross Plan I, II, or III:** Call Accordant at (800) 948-2497. For Pharmacy Advisor Counseling (with Anthem Blue Cross Plans I, II, and III) call (866) 624-1481. The Pharmacy Advisor is a program that provides personal pharmacy care for adults managing conditions like diabetes, high blood pressure, and heart disease.
- **If you are in Anthem Blue Cross Prudent Buyer:** Call ConditionCare at (800) 522-5560.
- **If you are enrolled in a Cigna medical plan, your disease management program is called Your Health First:** Call (855) 246-1873 for more information.
- **If you are in Kaiser Permanente:** Your disease management programs are automatically integrated in your care. For Wellness Coaching by phone in English or Spanish call (866) 862-4295 to make an appointment.

## Medicare Prescription Drug Program

In compliance with the Medicare Prescription Drug, Improvement, and Modernization Act of 2003 (MMA), Medicare introduced a prescription drug benefit called Medicare Part D on January 1, 2006. You may continue to receive information from the Centers for Medicare & Medicaid Services (CMS) and LACERA about your prescription drug options.

**As a reminder, please do not enroll in non-LACERA Medicare Part D plans before consulting with LACERA first.** If you do, you may jeopardize your coverage with LACERA — not just your prescription drug coverage, but all of your other medical coverage as well, and you may not be able to switch back to LACERA coverage until later. Also, if you have a Medicare Part D plan from an employer/agency other than LACERA, please consult with LACERA — CMS will not allow for both, and your coverage with LACERA may be jeopardized.

LACERA strives to ensure that our members continue to receive the best possible prescription drug coverage. If you have questions, please contact LACERA's Retiree Healthcare Division at (800) 786-6464 and press 1, or at (626) 564-6132, or email us at [healthcare@lacera.com](mailto:healthcare@lacera.com).



## Medicare Part B Premium Reimbursement Program Renewal

On December 8, 2020, the Board of Supervisors approved the 2021 Medicare Part B Premium Reimbursement Program for eligible LACERA-administered Medicare Plan enrollees.

Under the Medicare Part B Premium Reimbursement Program, the County reimburses members for their Medicare Part B premiums (up to the standard amount only) on a tax-free basis, provided members/eligible dependents meet the following eligibility requirements:

- Currently enrolled in both Medicare Parts A and B.
- Currently enrolled in a LACERA-administered Medicare HMO plan (such as Cigna Preferred with Rx, Kaiser Permanente Senior Advantage, UnitedHealthcare® Group Medicare Advantage (HMO), or SCAN) or a Medicare Supplement Plan (Anthem Blue Cross Plan III).
- Currently paying for their Medicare Part B premium themselves.
- They are not being reimbursed for their Medicare Part B premium by another agency, such as a different employer, or by the state.

Under the Los Angeles County Retiree Healthcare Benefits Program – Tier 2, the County subsidizes the full amount of **only the retiree's/survivor's** Medicare Part B Premium (up to the standard amount only).

The Medicare Part B Premium Reimbursement Program is subject to annual review by the Board of Supervisors. If you meet all of the requirements listed above and upon verification, the reimbursement amount is added to your monthly pension allowance (non-taxable).

If you and/or your eligible dependent meet all the requirements listed above and are eligible to receive the Medicare Part B premium reimbursement, you and/or your eligible dependent must provide documentation from the Social Security Administration (SSA) indicating how much you and/or your eligible dependent pay for your Medicare Part B monthly premium. The SSA verification must clearly list your name and information. LACERA sends the Request for Medicare Part B Premium Verification Notice usually in December, following the Board of Supervisors approval continuing the program for the following year, on an annual basis. If you have questions, or would like to request a verification letter, you can call Social Security directly at (800) 772-1213 (TTY (800) 325-0778), visit your local SSA office, or visit their website: [www.ssa.gov](http://www.ssa.gov).

**Please note:** 1099's are not acceptable as a form of verification as they do not list the Medicare Part B monthly premium amount.

**REMINDER:** If it is determined that another agency or the State is reimbursing you and/or your eligible dependent's Part B premium, we will suspend the reimbursement and you will be responsible for repaying any overpaid amount. As soon as you receive your new Medicare Part B verification letter from Social Security or Medicare, please submit a copy to LACERA's Retiree Healthcare Division. You may upload the document to MyLACERA by visiting [www.lacera.com](http://www.lacera.com), clicking on the "My LACERA" tab, then "Sign In" or "Register Now."

## 2021 Medicare Part B Premiums

The Centers for Medicare & Medicaid Services (CMS) recently announced that the standard monthly premium for Medicare Part B enrollees will be \$148.50 for 2021, a \$3.90 increase from 2020. However, a statutory "hold harmless" provision applies each year to about 70% of enrollees. For these enrollees, any increase in Part B premiums must be lower than the increase in their Social Security benefits. Social Security benefits will increase by 1.3% in 2021 due to the Cost of Living adjustment. **Therefore, some beneficiaries who were held harmless against Part B premium increases in prior years will have a premium increase in 2021.**

Higher income Medicare enrollees who filed an individual (or married and filing separately) 2019 tax return showing a modified adjusted gross income greater than \$88,000 (or \$176,000 for a joint tax return) are responsible for a larger portion of the estimated total cost of Part B benefit coverage. If you have questions, please contact the Social Security Administration at (800) 772-1213 (TTY (800) 325-0778) or [www.ssa.gov](http://www.ssa.gov), or contact Medicare at (800) 633-4227 or [www.medicare.gov](http://www.medicare.gov).

<b>Part B: Monthly Premiums</b>	
<b>(Medicare beneficiaries pay premiums directly to the Social Security Administration)</b>	
<b>Annual Income (File individual tax return)</b>	<b>2021 Monthly Premium</b>
\$0 – \$88,000	\$148.50 (standard amount)
\$88,001 – \$111,000	\$207.90
\$111,001 – \$138,000	\$297.00
\$138,001 – \$165,000	\$386.10
\$165,001 – \$500,000	\$475.20
over \$500,000	\$504.90

## Los Angeles County/City of Los Angeles Reciprocity

Los Angeles County and the City of Los Angeles have a contract to provide a retiree health insurance reciprocity program for members who meet the established eligibility requirements. An eligible member’s retirement date and years of service with each system will determine eligibility for full or limited reciprocity, as well as the plan for which he or she is eligible. If you think you may be eligible, please call LACERA’s Retiree Healthcare Division at (800) 786-6464 and press 1, or at (626) 564-6132, or email us at [healthcare@lacera.com](mailto:healthcare@lacera.com).

## County Contributions Towards Healthcare Monthly Premiums Based on Retirement Service Credit

The County contributes an amount equal to a percentage of your healthcare plan premium of the benchmark Anthem Blue Cross Plan I and Anthem Blue Cross Plan II indemnity medical plans and the Cigna indemnity dental/vision plan.

- **For members with 10 years of retirement service credit**, the County contributes 40% of your selected healthcare plan premium or 40% of the benchmark plan rate (**Tier 1:** Anthem Blue Cross Plans I and II for medical and Cigna Indemnity for dental/vision; **Tier 2** based on **retiree-only premium:** Non-Medicare-Eligible – Anthem Blue Cross Plans I and II, Medicare-Eligible – Anthem Blue Cross Plan III, and Cigna Indemnity for dental/vision), whichever is less. For more information on Tier 2, see the section below titled: Los Angeles County Retiree Healthcare Benefits Program – Tier 2.
- **For each year of retirement service credit beyond 10 years**, the County contributes an additional 4% per year of your selected healthcare plan premium or 4% of the benchmark plan rate (**Tier 1:** Anthem Blue Cross Plans I and II for medical and Cigna Indemnity for dental/vision; **Tier 2** based on **retiree-only premium:** Non-Medicare-Eligible – Anthem Blue Cross Plans I and II, Medicare-Eligible – Anthem Blue Cross Plan III, and Cigna Indemnity for dental/vision), whichever is less, up to a maximum of 100% for a member with 25 years of service credit. Members (including those with 25 years of service) are required to pay the difference each month on premiums exceeding the benchmark amount.

Although **retirees with less than 10 years of service credit** are not eligible for the County subsidy, they are eligible to enroll in LACERA-administered retiree healthcare benefits. In such cases, these retirees are responsible for the full amount of the monthly insurance premium amounts. The County's subsidy amount towards a member's healthcare premium is paid to the LACERA-administered health plan(s) that members choose to enroll in. Cash payment or cash payment towards the healthcare premium in a non-LACERA administered health plan is not an available option.

## Los Angeles County Retiree Healthcare Benefits Program — Tier 2

On June 17, 2014, the Los Angeles County Board of Supervisors (County) authorized a **new retiree health insurance program for new County employees who are hired after June 30, 2014 and are eligible for LACERA membership.**\* The program, titled the **Los Angeles County Retiree Healthcare Benefits Program – Tier 2**, offers benefits covering hospital services, medical services, and dental/vision services to County retirees and their eligible dependents. Retiree healthcare benefits are not changing for current active, deferred, and retired members and their eligible survivors hired before July 1, 2014. The LACERA-administered Retiree Healthcare Benefits Program provided to current retirees and members hired prior to July 1, 2014 are protected and remain unchanged.



### Basic Tier 2 Provisions:

- The County retiree **medical and dental/vision subsidy applies to retiree-only coverage. The County subsidy is based on retiree-only coverage, regardless of whether the retiree includes an eligible dependent(s) on his or her healthcare plan.** If you enroll dependents, you will pay the difference on any monthly premium that exceeds the retiree-only benchmark amount.
- Medicare-eligible retirees and eligible dependents **must enroll in Medicare Parts A and B and in a corresponding Medicare health plan, such as a Medicare Advantage Prescription Drug Plan (MA-PD) or Medicare Supplement Plan.**
- A retiree and his or her eligible dependents must be **enrolled in the same medical plan**, unless some, but not all, family members are Medicare-eligible. In such case, the Medicare-eligible individuals must enroll in a Medicare Plan and non-Medicare-eligible individuals must enroll in the corresponding non-Medicare health plan.

### Benchmark Plans (retiree-only coverage):

- Medicare-ineligible retirees – Anthem Blue Cross I and II
- Medicare-eligible retirees – Anthem Blue Cross III
- Dental/vision – Cigna Indemnity Dental

### Retirees Eligible for Medicare

- Mandatory enrollment in LACERA-administered Medicare Plans
  - Must enroll in Medicare Parts A and B
  - Must enroll in Medicare Advantage Prescription Drug Plan (MA-PD) or Medicare Supplement Plan
  - Also applies to eligible dependents who are Medicare-eligible

- County subsidizes the full amount of the **retiree's self-only** Medicare Part B Premium (standard amount); subsidy is tax-free provided the retiree meets eligibility requirements, subject to an annual review by the Board of Supervisors.
- Medical benchmark plan: retiree-only coverage in the Anthem Blue Cross Plan III

For more details about the Tier 2 Program, go to [www.lacera.com/healthcare/RHC-Tier2.html](http://www.lacera.com/healthcare/RHC-Tier2.html) or contact LACERA.

*\*Affected new employees first became eligible for LACERA membership on or after August 1, 2014 and were not eligible for reciprocity with a reciprocal agency based on service prior to August 1, 2014.*

## Plan Limitations and Exclusions

Each LACERA-administered health plan has its own exclusions, limitations, arbitration provisions, and contracts with Medicare with respect to healthcare services they can provide to their members. Please refer to the documents for each plan and **read them carefully and understand the rules** to become familiar with the provisions as they apply to the plan in which you are enrolled. You can obtain plan documents by requesting them directly from the insurance carrier.

## Dependent Eligibility

In order to cover your eligible spouse/dependent child(ren)/domestic partner/adopted child(ren), the official documents listed below must be provided to LACERA at the time of enrollment. Your enrollment form will be processed upon receipt of all required documents. We encourage you to submit photocopies of the necessary documents but will accept original documents.\*

- Photocopy of Certified Marriage Certificate or photocopy of Certificate of Domestic Partnership\*\* with the California Secretary of State.
- Photocopy of Certified Birth Certificate for eligible dependent children.  
All photocopies must be submitted with a signed Certificate Attestation Form – downloadable from the Brochures and Forms page of [www.lacera.com](http://www.lacera.com) – to certify that the copy submitted is a correct copy and contains no alterations from the original.
- Copy of legal court document for adopted children.
- Current physical or mental handicap verification form/physician statement/proof of continuous coverage for handicap child/proof of financial support.

You can easily provide LACERA with the necessary documents by:

- Uploading a scanned copy to your My LACERA account,
- Sending via email to [welcome@lacera.com](mailto:welcome@lacera.com),
- Faxing to (626) 564-6155, or
- Mailing to: LACERA, PO Box 7060, Pasadena, CA 91109-7060.

*\* Please note it may take a few weeks to return the original documents to you.*

*\*\* Domestic Partnership: On July 30, 2019, Governor Gavin Newsom signed SB 30, which eliminates the limitations on who may form domestic partnerships, allowing opposite-sex couples under the age of 62 to be eligible to form domestic partnerships. The new law, which became effective January 1, 2020, states that all couples, regardless of age or sexual orientation, who are eligible to be married may register with the California Secretary of State as domestic partners. For more information, please contact the California Secretary of State, Public Information at (916) 653-6814 or visit their website at [www.sos.ca.gov](http://www.sos.ca.gov).*

## Medical Plan Highlights

The following non-Medicare plans are available to retirees and their eligible dependents.

### Indemnity Plans

		Deductible
<b>Anthem Blue Cross Plan I</b>	You may see any physician you choose; the plan pays 80% after the deductible has been met. Hospital room and board is covered at \$75 a day. There is no limit on your out-of-pocket expenses, and the plan's lifetime maximum benefit is \$1,000,000.	Individual — \$100 Family — \$100
<b>Anthem Blue Cross Plan II</b>	You may see any physician you choose; the plan pays 80% after the deductible has been met. Hospital room and board is covered at 90% for a network hospital (non-Medicare members only) or 80% for a non-network hospital for a semi-private room. Your out-of-pocket maximum for covered expenses is \$2,500 a year, including deductible (does not include amounts over allowable charges). This plan has a lifetime maximum benefit of \$1,000,000.	Individual — \$500 Family — \$1,500*
<b>Anthem Blue Cross Prudent Buyer Plan</b>	You may see any physician you choose: if you see a Prudent Buyer physician, the plan pays 80% after the deductible has been met; if you see a non-Prudent Buyer physician, the plan pays 70% after the deductible has been met. There is no limit on your out-of-pocket expenses, and the plan's lifetime maximum benefit is \$1,000,000.	Individual — \$100 Family — \$200**

### Health Maintenance Organizations (HMOs)

		Deductible	Office Visit Copay
<b>Cigna Network Model Plan</b>	You must select a network primary care physician for medical care.	N/A	\$5
<b>Kaiser Permanente</b>	You must receive ALL medical care from Kaiser Permanente, or Kaiser Permanente affiliated physicians, at a Kaiser facility, except in the case of a life-threatening emergency.	N/A	\$5
<b>UnitedHealthcare</b>	You must see network physicians for medical care.	N/A	\$5

\* Each family member must meet the individual deductible of \$500. \$1,000 is the maximum combined deductible for families with two participants. \$1,500 is the maximum combined deductible for families with three or more participants.

\*\* Each family member must meet the individual deductible of \$100. \$200 is the maximum combined deductible for families with two or more participants.



The following Medicare plans are available to retirees and their eligible dependents who are Medicare-eligible and currently enrolled in Medicare Parts A and B.

## Medicare Supplement Plan

		Deductible
<b>Anthem Blue Cross Plan III</b>	You should receive services from a physician who accepts Medicare assignment. When you receive services from a physician who accepts Medicare assignment, the plan pays 20% of Medicare-approved charges while Medicare pays 80% (in-network only). If you receive services from a physician who does not accept Medicare assignment, you will pay the full cost. This plan has an unlimited lifetime maximum benefit.	None

## Medicare HMOs (also called Medicare Advantage Prescription Drug (MA-PD) Plan)

		Deductible	Office Visit Copay
<b>Cigna Preferred with Rx</b>	You must see network physicians for medical care.	N/A	\$0
<b>Kaiser Permanente Senior Advantage*</b>	You must receive ALL medical care from Kaiser Permanente, or Kaiser Permanente affiliated physicians, at a Kaiser facility, except in the case of a life-threatening emergency.	N/A	\$5
<b>UnitedHealthcare Group Medicare Advantage (HMO)*</b>	You must see network physicians for medical care.	N/A	\$5
<b>SCAN Health Plan*</b>	You must see network physicians for medical care.	N/A	\$5

\* If you are enrolled in the above plans, Medicare will not reimburse or pay for any treatment outside your elected healthcare plan. Your plan will not cover you for treatment received outside the plan's network except in an emergency.

		Deductible	Cost
<b>Cigna Indemnity Dental/Vision</b>	<b>Dental:</b> You may see any dentist in the U.S. for dental care.	Individual — \$25 Family — \$50	20%*
	<b>Vision:</b> You may receive in-network or out-of-network benefits.	N/A	Depends on service
<b>Cigna Dental HMO/Vision</b>	<b>Dental:</b> You must see network dentists for dental care.	N/A	\$0**
	<b>Vision:</b> You may receive in-network or out-of-network benefits.	N/A	Depends on service

\* Member pays this percentage of usual and customary charges and the plan pays 80%, after deductible. Procedures with **high noble gold** are covered at 50%, after deductible.

\*\* Member copay, plus additional charges specified in the plan brochure. Cigna Dental HMO members can access a copayment schedule at [www.cigna.com](http://www.cigna.com).

## When and How You Can Change Medical Plans

In most cases, after completing a **six-month waiting period**, you can change from any LACERA-administered medical plan to any other LACERA-administered medical plan. Coverage is continuous, and you do not need to provide evidence of insurability.

### Procedure for Changing Medical Plans

1. Contact LACERA at (800) 786-6464 and press 1, or at (626) 564-6132, 7:00 a.m. to 5:30 p.m., Monday through Friday, and request a Change Form. You can download a copy of the Change Form from the website at [www.lacera.com](http://www.lacera.com). Look for RHC Brochures and Forms under the Retiree Healthcare tab.
2. Fill out the Change Form completely, and be sure to sign it and keep the last copy for your records.
3. Mail the rest of the form back to LACERA.
4. Coverage takes effect the first day of the month after completion of a six-month waiting period. The waiting period begins the month after your Change Form is received by LACERA.

### Exceptions to the Six-Month Waiting Period

The six-month waiting period will not apply if:

- You move out of your HMO service area.
- You're currently enrolled in the Anthem Blue Cross of California Prudent Buyer Plan and move out of the Prudent Buyer network area.
- You change from any LACERA-administered plan to SCAN Health Plan.
- You change from Anthem Blue Cross Plan I, Anthem Blue Cross Plan II, Anthem Blue Cross Prudent Buyer Plan, Kaiser Permanente, UnitedHealthcare, or Cigna Network Model Plan to Kaiser Permanente Senior Advantage, UnitedHealthcare Group Medicare Advantage (HMO), SCAN, or Anthem Blue Cross III.
- You change **from** Anthem Blue Cross Plan I **to** Anthem Blue Cross Plan II.

If you qualify for an exception to the waiting period, your plan change is effective as follows:

<b>If Your Change Form Is Received By:</b>	<b>Your Plan Change Is Effective:</b>
The 15th day of any month	The 1st day of the month following receipt of your request

*Example: If your form is received by June 15, your plan change will be effective July 1.*

If your change is to enroll in a Medicare Advantage Prescription Drug (MA-PD) HMO, your plan change is effective as follows (provided a copy of your Medicare Part A and B card is received):

<b>If Your Change Form Is Received By:</b>	<b>Your Plan Change Is Effective:</b>
The 15th day of any month	The 1st day of the month following receipt of your request

*Example: If your form is received by June 15, your plan change will be effective July 1.*

## Disenrolling from the Medicare Advantage Prescription Drug Plan (MA-PD)

If you wish to disenroll from your LACERA-administered Medicare Advantage Prescription Drug Plan (MA-PD), you should contact the LACERA Retiree Healthcare Division.

Depending on the plan you're disenrolling from, you may have the use of your Medicare benefits within 30 – 45 days of disenrollment. However, you must complete a six-month waiting period before transferring to another LACERA-administered health plan, except SCAN Health Plan. If you do not contact LACERA to coordinate your disenrollment, you will be subject to Late Enrollment rules when reenrolling in another LACERA-administered plan.

The LACERA Retiree Healthcare Division will coordinate your transfer to another plan so you avoid being covered by only original Medicare (Part A and Part B) during the waiting period — it is not necessary for you to notify either your current insurance carrier or your local Social Security office.

## When and How You Can Change Dental/Vision Plans

In most cases, after completing a **one-year waiting period**, you can change from one LACERA-administered dental/vision plan to the other.

### Procedure for Changing Dental/Vision Plans

1. Request a Change Form by contacting LACERA at (800) 786-6464 and press 1, or at (626) 564-6132, 7:00 a.m. to 5:30 p.m., Monday through Friday. You can also download a copy of the Change Form from the website, at [www.lacera.com](http://www.lacera.com).
2. Fill out the Change Form completely and be sure to sign it and keep the last copy for your records.
3. Mail the rest of the form back to LACERA.
4. Coverage takes effect the first day of the month after completion of a one-year waiting period. The waiting period begins the month after your Change Form is received by LACERA.

### Exceptions to One-Year Wait:

- You move out of your Cigna dental/vision HMO service area.

If you qualify for an exception to the waiting period, your plan change is effective as follows:

If Your Dental Change Form is Received By:	Your Plan Change is Effective:
The 15th day of any month	The 1st day of the month following receipt of your request

*Example: If your form is received by June 15th, your plan change will be effective July 1st of the next month.*

Please note: The LACERA-administered group plans do not have an annual open enrollment period. You may make changes to your plans anytime; however, the waiting periods will apply accordingly: Medical - six months waiting period and Dental/Vision - one year waiting period.

**Important Reminder:** As a LACERA member, you are responsible for notifying LACERA to request a Change Form to add or remove dependents from your plan within 30 days of a qualifying event (e.g., marriage/divorce/registration or termination of a domestic partnership, birth, adoption, death, disenrollment). If you are adding an eligible dependent, LACERA must receive the enrollment form within 30 days of the qualifying event, otherwise the late enrollment rules will apply (please see pages 8 and 9 of this booklet for the rules).

## **Moving Permanently Out of Your Plan Network, Outside California, or Outside the United States**

The benefits offered by all LACERA-administered health plans change when an enrolled member moves outside the provider network. Moving to a new location can impact your plan's service area, rates, and coverage levels. Before moving outside your provider network, please contact the Retiree Healthcare Division to determine the options you have and the changes you can expect, as well as confirming coverage service areas.

## **If You Move Outside California or a Health Plan Service Area**

If you decide to move outside California or out of your health plan's service area, you may have to make changes to your health plans. The benefits offered under the LACERA-administered Retiree Healthcare Benefits Program's group healthcare plans change when an enrolled member moves outside of the provider's network. Moving to a new location outside of your plan's service area can impact your plan's rates and coverage levels. Insurance requirements vary from state to state, and there may be specific state provisions that result in differences in plan benefits. For example, some wellness programs and routine checkups for adults are available in California but not in other states.

If you move outside California or out of your healthcare plan's service area, you may find:

- Your current health plan is not available. HMO plans are available in defined geographic areas.
- Your benefits may be reduced if the provider is not in-network. Anthem Prudent Buyer is a California-based, preferred provider network.

Please notify LACERA first before disenrolling from your current health plan. Here's a quick overview of how each of your LACERA-administered plans handles out-of-area retirees:

<b>Health Plan</b>	<b>Out-of-Area Benefits</b>
<b>Anthem Blue Cross Plans I and II</b>	Plan pays 80% of covered expenses, although deductibles and hospital benefits differ between Plan I and Plan II. You are covered anywhere in the U.S. as well as in many foreign countries.
<b>Anthem Blue Cross Plan III (Medicare Supplement Plan)*</b>	Plan pays 20% of covered eligible Medicare expenses after Medicare pays. You are covered anywhere in the U.S. by hospitals or providers who accept Medicare assignment or provide Medicare-eligible services. You are covered in foreign countries for emergencies only.
<b>Anthem Blue Cross Prudent Buyer Plan*</b>	Plan pays 70% of covered expenses (80% if an emergency situation) for any physician in any state. You are covered in foreign countries for emergencies only.
<b>Cigna Network Model Plan/ Cigna Preferred with Rx (available in Maricopa County and Apache Junction, Pinal County, Arizona only)*</b>	You will need to change to another plan if you move outside California or Arizona.
<b>Kaiser Permanente/Kaiser Permanente Senior Advantage*</b>	You will need to change to another plan if you move to an area not covered by a Kaiser Permanente ZIP code service area.
<b>SCAN Health Plan*</b>	<p>SCAN Health Plan is available to LACERA retirees and their eligible dependents who are age 65 or older and under age 65 enrolled in Medicare Parts A and B. SCAN Health Plan is not available to family members who are under age 65 unless enrolled in Medicare Parts A and B.</p> <p>SCAN Health Plan is a Medicare Advantage Prescription Drug Plan inclusive of value-added benefits, i.e., Tivity Health SilverSneakers Fitness program, Independent Living Power (ILP) services, unlimited transportation for any medical need(s) and access to Preferred Pharmacy Network discounts. ILP is a program designed to help SCAN members remain in their homes as long as they can safely do so, avoiding and/or delaying a nursing home. ILP benefits include a Personal Care Coordinator who can arrange for the following services: caregiver, home-delivered meals, homemaker services, personal care, emergency response system, adult day care, inpatient custodial care and/or caregiver relief. Please note that ILP is only available in the five core counties of Los Angeles, Orange, Riverside, San Bernardino, and San Diego. Contact SCAN or LACERA for the service areas.</p>

## Health Plan

## Out-of-Area Benefits

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### UnitedHealthcare\*

You will need to change to another plan if you move outside California or outside the UnitedHealthcare service area ZIP code.

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### UnitedHealthcare Group Medicare Advantage (HMO)\*

You must first notify LACERA. You will need to switch to another plan if you move outside California.

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\* *If you move permanently to a foreign country, the medical plans available to you are the Anthem Blue Cross Plans I and II. Anthem Blue Cross does not preauthorize any medical services provided in foreign countries. You must pay first and then send the bills, proof of medical necessity, and your payment information, along with an Anthem Blue Cross Foreign Claim Form, to Anthem Blue Cross of California for reimbursement. Contact Anthem Blue Cross to obtain an Anthem Blue Cross Foreign Claim Form.*

## Continuation Coverage Through LACERA's COBRA Program

The Consolidated Omnibus Budget Reconciliation Act of 1985 (COBRA) is a federal program that mandates LACERA to offer temporary continuation of benefits to eligible dependents in certain circumstances where coverage would otherwise terminate.

Dependents are considered eligible for continuation of benefits if they experience a “qualifying event” while continuously covered under a LACERA-administered health plan.

Qualifying events include:

- A divorce or legal separation of a spouse of a LACERA member.
- Termination of domestic partnership of a LACERA member and domestic partner registered with the California Secretary of State.
- Death of a LACERA member if his or her surviving spouse/domestic partner and dependents are not eligible to receive LACERA survivor benefits.
- An eligible dependent child who reaches the maximum age for the plan.

The maximum amount of time that COBRA benefits can be continued is 36 months, except under certain circumstances. You cannot be denied coverage based on your health status. ***It is your responsibility to notify LACERA within 30 days from the date of the qualifying event in order to be eligible to continue your coverage through COBRA.***

COBRA participants are responsible for paying their own premiums at the current COBRA rate, which includes a 2% administrative fee. Each year the COBRA rate is adjusted to reflect the actual cost of coverage. If you elect to continue coverage, you pay the full cost of that coverage. Your first quarterly payment must be received by LACERA within 45 days of enrolling, and all subsequent payments must be received by the 15th day prior to each coverage month to avoid cancellation of coverage.

**Note:** The benefits, exclusions, rules, plan limitations, arbitration provisions and contracts that govern the LACERA-administered health plans also apply to any coverage provided through COBRA.



## If You Have Questions...

- For verification of health insurance coverage, your physician or pharmacist must call the number on your ID card. The numbers shown below **are for your use and not for physicians or pharmacists.**
- Call the insurance carriers at the numbers listed below if you need ID cards, health plan booklets, or claim forms, or if you have billing questions.

Carrier	Phone Number	Website
<b>Medical Carriers</b>		
Accordant (Disease Management — Anthem Blue Cross Plans I, II, and III)	(844) 393-0864 TTY (800) 735-2962	www.accordant.com
Anthem Blue Cross ConditionCare (with Anthem Blue Cross Prudent Buyer)	(800) 522-5560	www.anthem.com/ca
IngenioRx (Pharmacy Benefit Manager — Anthem Blue Cross Prudent Buyer Plan)	(833) 267-2129	www.anthem.com/ca
Anthem Blue Cross Plans I, II, and III	(800) 284-1110	www.anthem.com/ca
Anthem Blue Cross Prudent Buyer Plan	(800) 284-1110	www.anthem.com/ca
Utilization Review (Anthem Blue Cross Plans I and II, Prudent Buyer Non-Medicare Members Only)	(800) 274-7767	www.anthem.com/ca
Cigna Network Model Plan	(800) 244-6224	www.cigna.com
Cigna Preferred with Rx (Available in Maricopa County and Apache Junction, Pinal County, Arizona only)	(800) 627-7534	www.cigna.com
CVS Caremark (Pharmacy Benefit Manager — Anthem Blue Cross Plans I, II, and III)	(800) 450-3755	www.caremark.com
Kaiser Permanente	(800) 464-4000	www.kp.org
Kaiser Permanente Senior Advantage	(800) 443-0815	www.kp.org
SCAN Health Plan	(800) 559-3500	www.scanhealthplan.com
UnitedHealthcare	(800) 624-8822	www.myuhc.com
UnitedHealthcare Group Medicare Advantage (HMO)	(800) 457-8506 TTY 711	www.uhcretiree.com
	8:00 a.m. to 8:00 p.m., all time zones, Monday through Friday	

Carrier	Phone Number	Website
<b>Dental/Vision Carriers</b>		
Cigna Dental HMO	(800) 244-6224	www.cigna.com
Cigna Indemnity Dental	(800) 244-6224	www.cigna.com
Cigna Vision Plan	(877) 478-7557	www.cigna.com

**Contact LACERA if you wish to:**

- Change healthcare plans
- Clarify the administrative rules
- Update personal information

LACERA Resource	Contact Information	Hours of Operation
<b>Retiree Healthcare Division</b>		
<i>Telephone</i>	(800) 786-6464, press 1, or (626) 564-6132	7:00 a.m. to 5:30 p.m. PST, Monday through Friday
<i>E-mail</i>	healthcare@lacera.com	24 hours a day, seven days a week (Response times are during business hours only, 7:00 a.m. to 5:30 p.m., Pacific Standard Time (PST), excluding Federal Holidays.)
<i>Mailing address</i>	LACERA, P.O. Box 7060 Pasadena, CA 91109-7060	
<i>Fax</i>	Primary fax number: (626) 564-6155 Urgent cases only: (626) 564-6799	24 hours a day, seven days a week
<i>Access My LACERA</i>	Go to the www.lacera.com homepage. Click on the My LACERA logo at the bottom of the page, then "Sign In" or "Register Now."	24 hours a day, seven days a week
<i>Website</i>	www.lacera.com	24 hours a day, seven days a week
<b>LACERA Member Services Center</b>	300 North Lake Avenue 1st Floor Pasadena, CA	7:00 a.m. to 5:00 p.m. PST, Monday through Friday



You may contact the LACERA Retiree Healthcare Division to request new enrollment/change/cancellation forms for medical and/or dental/vision coverage.

Or, you may access and download the forms directly from the LACERA website:

- Go to [www.lacera.com](http://www.lacera.com).

- On the homepage, select the "Retiree Healthcare" tab at the top of the page.

- On the Retiree Healthcare homepage, click on the link located on the far right side of the page: "Access and download healthcare forms" underneath the "You might find this helpful! RHC Brochures and Forms Page" banner.

## **IMPORTANT REMINDERS – MEMBER RESPONSIBILITIES:**

- LACERA does not need information about your health or health conditions in order to assist you with your enrollment, administrative, or claims/service issues. In order to protect your private health information, we request that you limit your conversations and written correspondence with/to LACERA staff to your non-health issues only.
- You have the responsibility to read and understand, to the best of your ability, all information about your LACERA-administered retiree healthcare benefits or contact your carrier or LACERA if you need further clarification.
- You are responsible for notifying LACERA of any enrollment errors. Any time that you receive new ID cards from carriers, double check those to make sure you are in the healthcare plan you requested to be enrolled in on your enrollment form. Contact LACERA immediately if there are any discrepancies or problems.
- You are responsible for notifying LACERA to request an Enrollment Change Form(s) to add or remove a dependent(s) from your plan within 30 days of the qualifying event or change in family status, for example, marriage, birth, adoption, divorce, registration or termination of a domestic partnership, death, or disenrollment. The enrollment forms must be received by LACERA within 30 days of the qualifying event, otherwise the waiting period rules will apply. To ensure that you do not pay premiums for dependents that are no longer covered, you must contact LACERA and submit the enrollment form(s) within 30 days of the qualifying event. Any premiums paid for ineligible dependents may be refunded to you for a period of up to 12 months only. Contact LACERA if you have questions.

*In the event of any discrepancy between the information provided in this brochure and the formal SPD/Plan Document, the terms of the SPD/Plan Document will govern your entitlement to benefits, if any.*



**L/CERA**



Los Angeles County Employees Retirement Association

# 2021 Monthly Premium **RATES**

**For the LACERA Group Medical Insurance Plans  
and Group Dental/Vision Plans**

**TIER 1 AND TIER 2**

**Effective July 1, 2021**

# Tier 1

## Table of Contents

Anthem Blue Cross I . . . . .	1
Anthem Blue Cross II . . . . .	2
Anthem Blue Cross Prudent Buyer Plan . . . . .	3
Anthem Blue Cross III . . . . .	4–5
Cigna Network Model Plan . . . . .	6
SCAN Health Plan . . . . .	7
UnitedHealthcare . . . . .	8
UnitedHealthcare® Group Medicare Advantage (HMO)/UnitedHealthcare . . . . .	9
Kaiser Permanente/Kaiser Permanente Senior Advantage for California Residents . . . . .	10–13
Cigna Dental HMO/Vision . . . . .	14
Cigna Indemnity Dental/Vision . . . . .	15

### County of Los Angeles Contribution—Tier 1 (County employees with hire date before July 1, 2014)

The County contributes an amount equal to a percentage of your healthcare plan premium or the benchmark Anthem Blue Cross I, Anthem Blue Cross II indemnity medical plans, and the Cigna indemnity dental/vision plan, whichever is less.

- For members with 10 years of retirement service credit, the County contributes 40% of your healthcare plan premium or 40% of the benchmark plan rate (Anthem Blue Cross Plans I and II for medical and Cigna for dental/vision), whichever is less.
- For each year of retirement service credit beyond 10 years, the County contributes an additional 4% per year of your healthcare plan premium or 4% of the benchmark plan rate (Anthem Blue Cross Plans I and II for medical and Cigna for dental/vision), whichever is less, up to a maximum of 100% for a member with 25 years of service credit. You are responsible for any premium difference each month on premiums exceeding the benchmark amounts (including those with 25 years of service).

**NOTE:** The County’s subsidy amount towards a member’s healthcare premium is paid to the LACERA-administered health plan(s) that members choose to enroll in. Cash payment or cash payment towards the healthcare premium in a non-LACERA administered health plan is not an available option.

# Tier 1

## Anthem Blue Cross I\*\*

Rates Effective July 1, 2021

Years of Service	Retiree Only	Retiree and Spouse	Retiree, Spouse, and Children	Retiree and Children
Deduction Code	(211)	(212)	(213)	(214)
<b>Less than 10*</b>	<b>\$ 1,273.39</b>	<b>\$ 2,295.06</b>	<b>\$ 2,707.06</b>	<b>\$ 1,684.53</b>
10 to 11*	\$ 764.03	\$ 1,377.04	\$ 1,624.24	\$ 1,010.72
11 to 12*	\$ 713.10	\$ 1,285.23	\$ 1,515.95	\$ 943.34
12 to 13*	\$ 662.16	\$ 1,193.43	\$ 1,407.67	\$ 875.96
13 to 14	\$ 611.23	\$ 1,101.63	\$ 1,299.39	\$ 808.57
14 to 15	\$ 560.29	\$ 1,009.83	\$ 1,191.11	\$ 741.19
15 to 16	\$ 509.36	\$ 918.02	\$ 1,082.82	\$ 673.81
16 to 17	\$ 458.42	\$ 826.22	\$ 974.54	\$ 606.43
17 to 18	\$ 407.48	\$ 734.42	\$ 866.26	\$ 539.05
18 to 19	\$ 356.55	\$ 642.62	\$ 757.98	\$ 471.67
19 to 20	\$ 305.61	\$ 550.81	\$ 649.69	\$ 404.29
20 to 21	\$ 254.68	\$ 459.01	\$ 541.41	\$ 336.91
21 to 22	\$ 203.74	\$ 367.21	\$ 433.13	\$ 269.52
22 to 23	\$ 152.81	\$ 275.41	\$ 324.85	\$ 202.14
23 to 24	\$ 101.87	\$ 183.60	\$ 216.56	\$ 134.76
24 to 25	\$ 50.94	\$ 91.80	\$ 108.28	\$ 67.38
25 or more	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Service-Connected Disability Retirement				
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:				
	\$ 636.69	\$ 1,147.53	\$ 1,353.53	\$ 842.26

COBRA				
	\$ 1,298.86	\$ 2,340.96	\$ 2,761.20	\$ 1,718.22

\*\*Benchmark Plan (Medical)

## Tier 1

### Anthem Blue Cross II\*\*

Rates Effective July 1, 2021

Years of Service	Retiree Only	Retiree and Spouse	Retiree, Spouse, and Children	Retiree and Children
Deduction Code	(221)	(222)	(223)	(224)
<b>Less than 10*</b>	<b>\$ 1,273.39</b>	<b>\$ 2,295.06</b>	<b>\$ 2,707.06</b>	<b>\$ 1,684.53</b>
10 to 11*	\$ 764.03	\$ 1,377.04	\$ 1,624.24	\$ 1,010.72
11 to 12*	\$ 713.10	\$ 1,285.23	\$ 1,515.95	\$ 943.34
12 to 13*	\$ 662.16	\$ 1,193.43	\$ 1,407.67	\$ 875.96
13 to 14	\$ 611.23	\$ 1,101.63	\$ 1,299.39	\$ 808.57
14 to 15	\$ 560.29	\$ 1,009.83	\$ 1,191.11	\$ 741.19
15 to 16	\$ 509.36	\$ 918.02	\$ 1,082.82	\$ 673.81
16 to 17	\$ 458.42	\$ 826.22	\$ 974.54	\$ 606.43
17 to 18	\$ 407.48	\$ 734.42	\$ 866.26	\$ 539.05
18 to 19	\$ 356.55	\$ 642.62	\$ 757.98	\$ 471.67
19 to 20	\$ 305.61	\$ 550.81	\$ 649.69	\$ 404.29
20 to 21	\$ 254.68	\$ 459.01	\$ 541.41	\$ 336.91
21 to 22	\$ 203.74	\$ 367.21	\$ 433.13	\$ 269.52
22 to 23	\$ 152.81	\$ 275.41	\$ 324.85	\$ 202.14
23 to 24	\$ 101.87	\$ 183.60	\$ 216.56	\$ 134.76
24 to 25	\$ 50.94	\$ 91.80	\$ 108.28	\$ 67.38
25 or more	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Service-Connected Disability Retirement				
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:				
	\$ 636.69	\$ 1,147.53	\$ 1,353.53	\$ 842.26

COBRA				
	\$ 1,298.86	\$ 2,340.96	\$ 2,761.20	\$ 1,718.22

\*\*Benchmark Plan (Medical)

## Tier 1

### Anthem Blue Cross Prudent Buyer Plan

Rates Effective July 1, 2021

Years of Service	Retiree Only	Retiree and Spouse	Retiree, Spouse, and Children	Retiree and Children
Deduction Code	(201)	(202)	(203)	(204)
<b>Less than 10*</b>	<b>\$ 883.07</b>	<b>\$ 1,736.25</b>	<b>\$ 1,959.30</b>	<b>\$ 1,134.63</b>
10 to 11*	\$ 529.84	\$ 1,041.75	\$ 1,175.58	\$ 680.78
11 to 12*	\$ 494.52	\$ 972.30	\$ 1,097.21	\$ 635.39
12 to 13*	\$ 459.20	\$ 902.85	\$ 1,018.84	\$ 590.01
13 to 14	\$ 423.87	\$ 833.40	\$ 940.46	\$ 544.62
14 to 15	\$ 388.55	\$ 763.95	\$ 862.09	\$ 499.24
15 to 16	\$ 353.23	\$ 694.50	\$ 783.72	\$ 453.85
16 to 17	\$ 317.91	\$ 625.05	\$ 705.35	\$ 408.47
17 to 18	\$ 282.58	\$ 555.60	\$ 626.98	\$ 363.08
18 to 19	\$ 247.26	\$ 486.15	\$ 548.60	\$ 317.70
19 to 20	\$ 211.94	\$ 416.70	\$ 470.23	\$ 272.31
20 to 21	\$ 176.61	\$ 347.25	\$ 391.86	\$ 226.93
21 to 22	\$ 141.29	\$ 277.80	\$ 313.49	\$ 181.54
22 to 23	\$ 105.97	\$ 208.35	\$ 235.12	\$ 136.16
23 to 24	\$ 70.65	\$ 138.90	\$ 156.74	\$ 90.77
24 to 25	\$ 35.32	\$ 69.45	\$ 78.37	\$ 45.39
25 or more	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Service-Connected Disability Retirement				
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:				
	\$ 441.53	\$ 868.12	\$ 979.65	\$ 567.31

COBRA				
	\$ 900.73	\$ 1,770.98	\$ 1,998.49	\$ 1,157.32

# Tier 1

# Tier 1

## Anthem Blue Cross III (Medicare Supplement Plan)

Rates Effective July 1, 2021

Years of Service	Retiree Only with Medicare	Retiree and Spouse — 1 with Medicare <sup>1</sup>	Retiree and Spouse — 1 with Medicare <sup>2</sup>	Retiree and Spouse — Both with Medicare	Retiree and Children <sup>3</sup>	Retiree and Children <sup>4</sup>	Retiree, Spouse, and Children — 1 with Medicare <sup>5</sup>	Retiree, Spouse, and Children — 1 with Medicare <sup>6</sup>	Retiree, Spouse, and Children — 2 with Medicare <sup>7</sup>	Retiree, Spouse, and Children — 2 with Medicare <sup>8</sup>	Retiree, Spouse, and Children — each with Medicare <sup>9</sup>
Deduction Code	(240)	(241)	(242)	(243)	(244)	(245)	(246)	(247)	(248)	(249)	(250)
<b>Less than 10*</b>	<b>\$ 519.08</b>	<b>\$ 1,657.63</b>	<b>\$ 1,657.63</b>	<b>\$ 1,032.26</b>	<b>\$ 928.76</b>	<b>\$ 928.76</b>	<b>\$ 2,067.18</b>	<b>\$ 2,067.18</b>	<b>\$ 1,441.73</b>	<b>\$ 1,441.73</b>	<b>\$ 1,615.64</b>
10 to 11*	\$ 311.45	\$ 994.58	\$ 994.58	\$ 619.36	\$ 557.26	\$ 557.26	\$ 1,240.31	\$ 1,240.31	\$ 865.04	\$ 865.04	\$ 969.38
11 to 12*	\$ 290.68	\$ 928.27	\$ 928.27	\$ 578.07	\$ 520.11	\$ 520.11	\$ 1,157.62	\$ 1,157.62	\$ 807.37	\$ 807.37	\$ 904.76
12 to 13*	\$ 269.92	\$ 861.97	\$ 861.97	\$ 536.78	\$ 482.96	\$ 482.96	\$ 1,074.93	\$ 1,074.93	\$ 749.70	\$ 749.70	\$ 840.13
13 to 14	\$ 249.16	\$ 795.66	\$ 795.66	\$ 495.48	\$ 445.80	\$ 445.80	\$ 992.25	\$ 992.25	\$ 692.03	\$ 692.03	\$ 775.51
14 to 15	\$ 228.40	\$ 729.36	\$ 729.36	\$ 454.19	\$ 408.65	\$ 408.65	\$ 909.56	\$ 909.56	\$ 634.36	\$ 634.36	\$ 710.88
15 to 16	\$ 207.63	\$ 663.05	\$ 663.05	\$ 412.90	\$ 371.50	\$ 371.50	\$ 826.87	\$ 826.87	\$ 576.69	\$ 576.69	\$ 646.26
16 to 17	\$ 186.87	\$ 596.75	\$ 596.75	\$ 371.61	\$ 334.35	\$ 334.35	\$ 744.18	\$ 744.18	\$ 519.02	\$ 519.02	\$ 581.63
17 to 18	\$ 166.11	\$ 530.44	\$ 530.44	\$ 330.32	\$ 297.20	\$ 297.20	\$ 661.50	\$ 661.50	\$ 461.35	\$ 461.35	\$ 517.00
18 to 19	\$ 145.34	\$ 464.14	\$ 464.14	\$ 289.03	\$ 260.05	\$ 260.05	\$ 578.81	\$ 578.81	\$ 403.68	\$ 403.68	\$ 452.38
19 to 20	\$ 124.58	\$ 397.83	\$ 397.83	\$ 247.74	\$ 222.90	\$ 222.90	\$ 496.12	\$ 496.12	\$ 346.02	\$ 346.02	\$ 387.75
20 to 21	\$ 103.82	\$ 331.53	\$ 331.53	\$ 206.45	\$ 185.75	\$ 185.75	\$ 413.44	\$ 413.44	\$ 288.35	\$ 288.35	\$ 323.13
21 to 22	\$ 83.05	\$ 265.22	\$ 265.22	\$ 165.16	\$ 148.60	\$ 148.60	\$ 330.75	\$ 330.75	\$ 230.68	\$ 230.68	\$ 258.50
22 to 23	\$ 62.29	\$ 198.92	\$ 198.92	\$ 123.87	\$ 111.45	\$ 111.45	\$ 248.06	\$ 248.06	\$ 173.01	\$ 173.01	\$ 193.88
23 to 24	\$ 41.53	\$ 132.61	\$ 132.61	\$ 82.58	\$ 74.30	\$ 74.30	\$ 165.37	\$ 165.37	\$ 115.34	\$ 115.34	\$ 129.25
24 to 25	\$ 20.76	\$ 66.31	\$ 66.31	\$ 41.29	\$ 37.15	\$ 37.15	\$ 82.69	\$ 82.69	\$ 57.67	\$ 57.67	\$ 64.63
25 or more	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Service-Connected Disability Retirement											
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:											
	\$ 259.54	\$ 828.81	\$ 828.81	\$ 516.13	\$ 464.38	\$ 464.38	\$ 1,033.59	\$ 1,033.59	\$ 720.86	\$ 720.86	\$ 807.82

COBRA											
	\$ 529.46	\$ 1,690.78	\$ 1,690.78	\$ 1,052.91	\$ 947.34	\$ 947.34	\$ 2,108.52	\$ 2,108.52	\$ 1,470.56	\$ 1,470.56	\$ 1,647.95

<sup>1</sup> Non-Medicare has Anthem Blue Cross I  
<sup>2</sup> Non-Medicare has Anthem Blue Cross II  
<sup>3</sup> Retiree has Medicare; children have Anthem Blue Cross I  
<sup>4</sup> Retiree has Medicare; children have Anthem Blue Cross II  
<sup>5</sup> Non-Medicare has Anthem Blue Cross I  
<sup>6</sup> Non-Medicare has Anthem Blue Cross II  
<sup>7</sup> Children have Anthem Blue Cross I  
<sup>8</sup> Children have Anthem Blue Cross II  
<sup>9</sup> **Please note:** Only two parties will qualify for the Medicare Part B Premium Reimbursement Program, approved annually by the Los Angeles County Board of Supervisors.

# Tier 1

## Cigna Network Model Plan

Rates Effective July 1, 2021

Years of Service	Retiree Only	Retiree and Spouse	Retiree, Spouse, and Children	Retiree and Children
Deduction Code	(301)	(302)	(303)	(304)
<b>Less than 10*</b>	<b>\$ 1,655.81</b>	<b>\$ 2,989.10</b>	<b>\$ 3,529.49</b>	<b>\$ 2,196.92</b>
10 to 11*	\$ 1,146.45	\$ 2,071.08	\$ 2,446.67	\$ 1,523.11
11 to 12*	\$ 1,095.52	\$ 1,979.27	\$ 2,338.38	\$ 1,455.73
12 to 13*	\$ 1,044.58	\$ 1,887.47	\$ 2,230.10	\$ 1,388.35
13 to 14	\$ 993.65	\$ 1,795.67	\$ 2,121.82	\$ 1,320.96
14 to 15	\$ 942.71	\$ 1,703.87	\$ 2,013.54	\$ 1,253.58
15 to 16	\$ 891.78	\$ 1,612.06	\$ 1,905.25	\$ 1,186.20
16 to 17	\$ 840.84	\$ 1,520.26	\$ 1,796.97	\$ 1,118.82
17 to 18	\$ 789.90	\$ 1,428.46	\$ 1,688.69	\$ 1,051.44
18 to 19	\$ 738.97	\$ 1,336.66	\$ 1,580.41	\$ 984.06
19 to 20	\$ 688.03	\$ 1,244.85	\$ 1,472.12	\$ 916.68
20 to 21	\$ 637.10	\$ 1,153.05	\$ 1,363.84	\$ 849.30
21 to 22	\$ 586.16	\$ 1,061.25	\$ 1,255.56	\$ 781.91
22 to 23	\$ 535.23	\$ 969.45	\$ 1,147.28	\$ 714.53
23 to 24	\$ 484.29	\$ 877.64	\$ 1,038.99	\$ 647.15
24 to 25	\$ 433.36	\$ 785.84	\$ 930.71	\$ 579.77
25 or more	\$ 382.42	\$ 694.04	\$ 822.43	\$ 512.39

### Service-Connected Disability Retirement

*If you are on a service-connected disability retirement with less than 13 years of service, you pay:	\$ 1,019.11	\$ 1,841.57	\$ 2,175.96	\$ 1,354.65
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### COBRA

	\$ 1,688.93	\$ 3,048.88	\$ 3,600.08	\$ 2,240.86
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# Tier 1

## SCAN Health Plan

Retirees and eligible dependents enrolled in Medicare Parts A and B only

Rates Effective July 1, 2021

Years of Service	Retiree Only with SCAN	Retiree and 1 Dependent – Both with SCAN <sup>1</sup>
Deduction Code	(611)	(613)
<b>Less than 10*</b>	<b>\$ 283.60</b>	<b>\$ 559.20</b>
10 to 11*	\$ 170.16	\$ 335.52
11 to 12*	\$ 158.82	\$ 313.15
12 to 13*	\$ 147.47	\$ 290.78
13 to 14	\$ 136.13	\$ 268.42
14 to 15	\$ 124.78	\$ 246.05
15 to 16	\$ 113.44	\$ 223.68
16 to 17	\$ 102.10	\$ 201.31
17 to 18	\$ 90.75	\$ 178.94
18 to 19	\$ 79.41	\$ 156.58
19 to 20	\$ 68.06	\$ 134.21
20 to 21	\$ 56.72	\$ 111.84
21 to 22	\$ 45.38	\$ 89.47
22 to 23	\$ 34.03	\$ 67.10
23 to 24	\$ 22.69	\$ 44.74
24 to 25	\$ 11.34	\$ 22.37
25 or more	\$ 0.00	\$ 0.00

### Service-Connected Disability Retirement

*If you are on a service-connected disability retirement with less than 13 years of service, you pay:	\$ 141.80	\$ 279.60
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### COBRA

	\$ 289.27	\$ 570.38
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<sup>1</sup> Retiree and 1 Dependent = Retiree and Spouse/Domestic Partner OR Retiree and 1 Child. Both retiree and eligible dependents must be enrolled in Medicare Parts A and B.



# Tier 1

## UnitedHealthcare

For retirees and dependents under age 65 (no Medicare)

Rates Effective July 1, 2021

Years of Service	Retiree Only	Retiree and 1 Dependent	Retiree and 2 or More Dependents
Deduction Code	(707)	(708)	(709)
<b>Less than 10*</b>	<b>\$ 1,268.09</b>	<b>\$ 2,315.42</b>	<b>\$ 2,745.25</b>
10 to 11*	\$ 760.85	\$ 1,397.40	\$ 1,662.43
11 to 12*	\$ 710.13	\$ 1,305.59	\$ 1,554.14
12 to 13*	\$ 659.41	\$ 1,213.79	\$ 1,445.86
13 to 14	\$ 608.68	\$ 1,121.99	\$ 1,337.58
14 to 15	\$ 557.96	\$ 1,030.19	\$ 1,229.30
15 to 16	\$ 507.24	\$ 938.38	\$ 1,121.01
16 to 17	\$ 456.51	\$ 846.58	\$ 1,012.73
17 to 18	\$ 405.79	\$ 754.78	\$ 904.45
18 to 19	\$ 355.07	\$ 662.98	\$ 796.17
19 to 20	\$ 304.34	\$ 571.17	\$ 687.88
20 to 21	\$ 253.62	\$ 479.37	\$ 579.60
21 to 22	\$ 202.89	\$ 387.57	\$ 471.32
22 to 23	\$ 152.17	\$ 295.77	\$ 363.04
23 to 24	\$ 101.45	\$ 203.96	\$ 254.75
24 to 25	\$ 50.72	\$ 112.16	\$ 146.47
25 or more	\$ 0.00	\$ 20.36	\$ 38.19

Service-Connected Disability Retirement			
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:			
	\$ 634.04	\$ 1,167.89	\$ 1,391.72

COBRA			
	\$ 1,293.45	\$ 2,361.73	\$ 2,800.16

# Tier 1

## UnitedHealthcare® Group Medicare Advantage (HMO)/UnitedHealthcare

For both retirees and eligible dependents who are enrolled in the UnitedHealthcare Group Medicare Advantage (HMO), or a family combination of UnitedHealthcare Group Medicare Advantage (HMO)/UnitedHealthcare

Rates Effective July 1, 2021

Years of Service	Retiree Only with UnitedHealthcare Group Medicare Advantage (HMO)	Retiree and 1 Dependent — 1 with UnitedHealthcare Group Medicare Advantage (HMO) <sup>1</sup>	Retiree and 1 Dependent — Both with UnitedHealthcare Group Medicare Advantage (HMO) <sup>1</sup>	Retiree and 2 or More Dependents — 1 with UnitedHealthcare Group Medicare Advantage (HMO) <sup>2</sup>	Retiree and 2 or More Dependents — 2 with UnitedHealthcare Group Medicare Advantage (HMO) <sup>2</sup>
Deduction Code	(701)	(702)	(703)	(704)	(705)
<b>Less than 10*</b>	<b>\$ 336.45</b>	<b>\$ 1,596.54</b>	<b>\$ 664.90</b>	<b>\$ 1,813.61</b>	<b>\$ 881.97</b>
10 to 11*	\$ 201.87	\$ 957.92	\$ 398.94	\$ 1,088.17	\$ 529.18
11 to 12*	\$ 188.41	\$ 894.06	\$ 372.34	\$ 1,015.62	\$ 493.90
12 to 13*	\$ 174.95	\$ 830.20	\$ 345.75	\$ 943.08	\$ 458.62
13 to 14	\$ 161.50	\$ 766.34	\$ 319.15	\$ 870.53	\$ 423.35
14 to 15	\$ 148.04	\$ 702.48	\$ 292.56	\$ 797.99	\$ 388.07
15 to 16	\$ 134.58	\$ 638.62	\$ 265.96	\$ 725.44	\$ 352.79
16 to 17	\$ 121.12	\$ 574.75	\$ 239.36	\$ 652.90	\$ 317.51
17 to 18	\$ 107.66	\$ 510.89	\$ 212.77	\$ 580.36	\$ 282.23
18 to 19	\$ 94.21	\$ 447.03	\$ 186.17	\$ 507.81	\$ 246.95
19 to 20	\$ 80.75	\$ 383.17	\$ 159.58	\$ 435.27	\$ 211.67
20 to 21	\$ 67.29	\$ 319.31	\$ 132.98	\$ 362.72	\$ 176.39
21 to 22	\$ 53.83	\$ 255.45	\$ 106.38	\$ 290.18	\$ 141.12
22 to 23	\$ 40.37	\$ 191.58	\$ 79.79	\$ 217.63	\$ 105.84
23 to 24	\$ 26.92	\$ 127.72	\$ 53.19	\$ 145.09	\$ 70.56
24 to 25	\$ 13.46	\$ 63.86	\$ 26.60	\$ 72.54	\$ 35.28
25 or more	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Service-Connected Disability Retirement					
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:					
	\$ 168.22	\$ 798.27	\$ 332.45	\$ 906.80	\$ 440.98

COBRA					
	\$ 343.18	\$ 1,628.47	\$ 678.20	\$ 1,849.88	\$ 899.61

<sup>1</sup> Retiree and 1 Dependent = Retiree and Spouse/Domestic Partner OR Retiree and 1 Child

<sup>2</sup> Retiree and 2 or More Dependents = Retiree, Spouse/Domestic Partner, and 1 or More Children OR Retiree and 2 or More Children



# Tier 1

# Tier 1

## Kaiser Permanente/Kaiser Permanente Senior Advantage for California Residents

Rates Effective July 1, 2021

Years of Service	Retiree Only				Retiree and Family				
	(401)	(403)	(404)	(405)	(411)	(413)	(414)	(418)	(419)
<b>Less than 10*</b>	<b>\$ 1,173.13</b>	<b>\$ 261.84</b>	<b>\$ 1,177.37</b>	<b>\$ 1,176.86</b>	<b>\$ 2,338.26</b>	<b>\$ 1,426.97</b>	<b>\$ 2,342.50</b>	<b>\$ 515.68</b>	<b>\$ 1,431.21</b>
10 to 11*	\$ 703.88	\$ 157.10	\$ 706.42	\$ 706.12	\$ 1,402.96	\$ 856.18	\$ 1,405.50	\$ 309.41	\$ 858.73
11 to 12*	\$ 656.95	\$ 146.63	\$ 659.33	\$ 659.04	\$ 1,309.43	\$ 799.10	\$ 1,311.80	\$ 288.78	\$ 801.48
12 to 13*	\$ 610.03	\$ 136.16	\$ 612.23	\$ 611.97	\$ 1,215.90	\$ 742.02	\$ 1,218.10	\$ 268.15	\$ 744.23
13 to 14	\$ 563.10	\$ 125.68	\$ 565.14	\$ 564.89	\$ 1,122.36	\$ 684.95	\$ 1,124.40	\$ 247.53	\$ 686.98
14 to 15	\$ 516.18	\$ 115.21	\$ 518.04	\$ 517.82	\$ 1,028.83	\$ 627.87	\$ 1,030.70	\$ 226.90	\$ 629.73
15 to 16	\$ 469.25	\$ 104.74	\$ 470.95	\$ 470.74	\$ 935.30	\$ 570.79	\$ 937.00	\$ 206.27	\$ 572.48
16 to 17	\$ 422.33	\$ 94.26	\$ 423.85	\$ 423.67	\$ 841.77	\$ 513.71	\$ 843.30	\$ 185.64	\$ 515.24
17 to 18	\$ 375.40	\$ 83.79	\$ 376.76	\$ 376.60	\$ 748.24	\$ 456.63	\$ 749.60	\$ 165.02	\$ 457.99
18 to 19	\$ 328.48	\$ 73.32	\$ 329.66	\$ 329.52	\$ 654.71	\$ 399.55	\$ 655.90	\$ 144.39	\$ 400.74
19 to 20	\$ 281.55	\$ 62.84	\$ 282.57	\$ 282.45	\$ 561.18	\$ 342.47	\$ 562.20	\$ 123.76	\$ 343.49
20 to 21	\$ 234.63	\$ 52.37	\$ 235.47	\$ 235.37	\$ 467.65	\$ 285.39	\$ 468.50	\$ 103.14	\$ 286.24
21 to 22	\$ 187.70	\$ 41.89	\$ 188.38	\$ 188.30	\$ 374.12	\$ 228.32	\$ 374.80	\$ 82.51	\$ 228.99
22 to 23	\$ 140.78	\$ 31.42	\$ 141.28	\$ 141.22	\$ 280.59	\$ 171.24	\$ 281.10	\$ 61.88	\$ 171.75
23 to 24	\$ 93.85	\$ 20.95	\$ 94.19	\$ 94.15	\$ 187.06	\$ 114.16	\$ 187.40	\$ 41.25	\$ 114.50
24 to 25	\$ 46.93	\$ 10.47	\$ 47.09	\$ 47.07	\$ 93.53	\$ 57.08	\$ 93.70	\$ 20.63	\$ 57.25
25 or more	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

### Service-Connected Disability Retirement

\*If you are on a service-connected disability retirement with less than 13 years of service, you pay:

\$ 586.56	\$ 130.92	\$ 588.68	\$ 588.43	\$ 1,169.13	\$ 713.48	\$ 1,171.25	\$ 257.84	\$ 715.60
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### COBRA

\$ 1,196.59	\$ 267.08	\$ 1,200.92	\$ 1,200.40	\$ 2,385.03	\$ 1,455.51	\$ 2,389.35	\$ 525.99	\$ 1,459.83
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### Rate Categories and Deduction Codes

- 401 — Basic
- 403 — Senior Advantage
- 404 — Excess I (Closed to new enrollments)
- 405 — Excess II
- 411 — All family members are "Basic"
- 413 — One family member is "Senior Advantage"; others are "Basic"
- 414 — One family member is "Excess I"; others are "Basic" (Closed to new enrollments)
- 418 — Two or more family members are "Senior Advantage"
- 419 — One family member is "Excess I"; others are "Senior Advantage" (Closed to new enrollments)

### Definitions

**"Basic"** includes participants who are under age 65.

**"Senior Advantage"** includes participants who are age 65 or older and who have assigned both Medicare Parts A and B to Kaiser Permanente.

**"Excess I"** is for participants who have Medicare Part A only. (Note: Closed to new enrollments as of July 1, 2020.)

**"Excess II"** is for participants in the Excess Plan who either have Medicare Part B only or are not eligible for Medicare.

# Tier 1

# Tier 1

## Kaiser Permanente/Kaiser Permanente Senior Advantage for California Residents

Rates Effective July 1, 2021

Years of Service	Retiree and Family				Retiree and Family				
	(420)	(422)	(423)	(426)	(427)	(428)	(429)	(430)	(431)
Deduction Code	(420)	(422)	(423)	(426)	(427)	(428)	(429)	(430)	(431)
<b>Less than 10*</b>	<b>\$ 2,346.74</b>	<b>\$ 2,341.99</b>	<b>\$ 2,342.50</b>	<b>\$ 1,430.70</b>	<b>\$ 1,431.21</b>	<b>\$ 2,346.23</b>	<b>\$ 2,346.74</b>	<b>\$ 2,345.72</b>	<b>\$ 2,346.23</b>
10 to 11*	\$ 1,408.04	\$ 1,405.19	\$ 1,405.50	\$ 858.42	\$ 858.73	\$ 1,407.74	\$ 1,408.04	\$ 1,407.43	\$ 1,407.74
11 to 12*	\$ 1,314.17	\$ 1,311.51	\$ 1,311.80	\$ 801.19	\$ 801.48	\$ 1,313.89	\$ 1,314.17	\$ 1,313.60	\$ 1,313.89
12 to 13*	\$ 1,220.30	\$ 1,217.83	\$ 1,218.10	\$ 743.96	\$ 744.23	\$ 1,220.04	\$ 1,220.30	\$ 1,219.77	\$ 1,220.04
13 to 14	\$ 1,126.44	\$ 1,124.16	\$ 1,124.40	\$ 686.74	\$ 686.98	\$ 1,126.19	\$ 1,126.44	\$ 1,125.95	\$ 1,126.19
14 to 15	\$ 1,032.57	\$ 1,030.48	\$ 1,030.70	\$ 629.51	\$ 629.73	\$ 1,032.34	\$ 1,032.57	\$ 1,032.12	\$ 1,032.34
15 to 16	\$ 938.70	\$ 936.80	\$ 937.00	\$ 572.28	\$ 572.48	\$ 938.49	\$ 938.70	\$ 938.29	\$ 938.49
16 to 17	\$ 844.83	\$ 843.12	\$ 843.30	\$ 515.05	\$ 515.24	\$ 844.64	\$ 844.83	\$ 844.46	\$ 844.64
17 to 18	\$ 750.96	\$ 749.44	\$ 749.60	\$ 457.82	\$ 457.99	\$ 750.79	\$ 750.96	\$ 750.63	\$ 750.79
18 to 19	\$ 657.09	\$ 655.76	\$ 655.90	\$ 400.60	\$ 400.74	\$ 656.94	\$ 657.09	\$ 656.80	\$ 656.94
19 to 20	\$ 563.22	\$ 562.08	\$ 562.20	\$ 343.37	\$ 343.49	\$ 563.10	\$ 563.22	\$ 562.97	\$ 563.10
20 to 21	\$ 469.35	\$ 468.40	\$ 468.50	\$ 286.14	\$ 286.24	\$ 469.25	\$ 469.35	\$ 469.14	\$ 469.25
21 to 22	\$ 375.48	\$ 374.72	\$ 374.80	\$ 228.91	\$ 228.99	\$ 375.40	\$ 375.48	\$ 375.32	\$ 375.40
22 to 23	\$ 281.61	\$ 281.04	\$ 281.10	\$ 171.68	\$ 171.75	\$ 281.55	\$ 281.61	\$ 281.49	\$ 281.55
23 to 24	\$ 187.74	\$ 187.36	\$ 187.40	\$ 114.46	\$ 114.50	\$ 187.70	\$ 187.74	\$ 187.66	\$ 187.70
24 to 25	\$ 93.87	\$ 93.68	\$ 93.70	\$ 57.23	\$ 57.25	\$ 93.85	\$ 93.87	\$ 93.83	\$ 93.85
25 or more	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Service-Connected Disability Retirement									
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:									
	\$ 1,173.37	\$ 1,170.99	\$ 1,171.25	\$ 715.35	\$ 715.60	\$ 1,173.11	\$ 1,173.37	\$ 1,172.86	\$ 1,173.11

COBRA									
	\$ 2,393.67	\$ 2,388.83	\$ 2,389.35	\$ 1,459.31	\$ 1,459.83	\$ 2,393.15	\$ 2,393.67	\$ 2,392.63	\$ 2,393.15

### Rate Categories and Deduction Codes

- 420 — Two or more family members are "Excess I" (Closed to new enrollments)
- 422 — One family member is "Excess II"; others are "Basic"
- 423 — One family member is "Excess III"; others are "Basic" (NOTE: Closed to new enrollments effective July 1, 2021.)
- 426 — One family member is "Senior Advantage"; others are "Excess II"
- 427 — One family member is "Senior Advantage"; others are "Excess III" (NOTE: Closed to new enrollments effective July 1, 2021.)
- 428 — One family member is "Excess I"; others are "Excess II" (Closed to new enrollments)
- 429 — One family member is "Excess I"; others are "Excess III" (Closed to new enrollments)
- 430 — Two or more family members are "Excess II"
- 431 — One family member is "Excess II"; others are "Excess III" (NOTE: Closed to new enrollments effective July 1, 2021.)

### Definitions

- "Basic" includes participants who are under age 65.
- "Senior Advantage" includes participants who are age 65 or older and who have assigned both Medicare Parts A and B to Kaiser Permanente.
- "Excess I" is for participants who have Medicare Part A only. (NOTE: Closed to new enrollments as of July 1, 2020.)
- "Excess II" is for participants in the Excess Plan who either have Medicare Part B only or are not eligible for Medicare.
- "Excess III" is for participants in the Excess Plan who either have Medicare Parts A and B and have not assigned their Medicare benefits to Kaiser Permanente or have not provided their Medicare status to LACERA. (NOTE: Closed to new enrollments effective July 1, 2021.)

## Tier 1

### Cigna Dental HMO/Vision

Rates Effective July 1, 2021

Years of Service	Retiree Only	Retiree and Dependent(s)
Deduction Code	(901)	(902)
<b>Less than 10*</b>	<b>\$ 46.37</b>	<b>\$ 94.95</b>
10 to 11*	\$ 27.82	\$ 56.97
11 to 12*	\$ 25.97	\$ 53.17
12 to 13*	\$ 24.11	\$ 49.37
13 to 14	\$ 22.26	\$ 45.58
14 to 15	\$ 20.40	\$ 41.78
15 to 16	\$ 18.55	\$ 37.98
16 to 17	\$ 16.69	\$ 34.18
17 to 18	\$ 14.84	\$ 30.38
18 to 19	\$ 12.98	\$ 26.59
19 to 20	\$ 11.13	\$ 22.79
20 to 21	\$ 9.27	\$ 18.99
21 to 22	\$ 7.42	\$ 15.19
22 to 23	\$ 5.56	\$ 11.39
23 to 24	\$ 3.71	\$ 7.60
24 to 25	\$ 1.85	\$ 3.80
25 or more	\$ 0.00	\$ 0.00

#### Service-Connected Disability Retirement

*If you are on a service-connected disability retirement with less than 13 years of service, you pay:	\$ 23.18	\$ 47.47
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#### COBRA

	\$ 47.30	\$ 96.85
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## Tier 1

### Cigna Indemnity Dental/Vision\*\*

Rates Effective July 1, 2021

Years of Service	Retiree Only	Retiree and Dependent(s)
Deduction Code	(501)	(502)
<b>Less than 10*</b>	<b>\$ 51.43</b>	<b>\$ 106.94</b>
10 to 11*	\$ 30.86	\$ 64.16
11 to 12*	\$ 28.80	\$ 59.89
12 to 13*	\$ 26.74	\$ 55.61
13 to 14	\$ 24.69	\$ 51.33
14 to 15	\$ 22.63	\$ 47.05
15 to 16	\$ 20.57	\$ 42.78
16 to 17	\$ 18.51	\$ 38.50
17 to 18	\$ 16.46	\$ 34.22
18 to 19	\$ 14.40	\$ 29.94
19 to 20	\$ 12.34	\$ 25.67
20 to 21	\$ 10.29	\$ 21.39
21 to 22	\$ 8.23	\$ 17.11
22 to 23	\$ 6.17	\$ 12.83
23 to 24	\$ 4.11	\$ 8.56
24 to 25	\$ 2.06	\$ 4.28
25 or more	\$ 0.00	\$ 0.00

#### Service-Connected Disability Retirement

*If you are on a service-connected disability retirement with less than 13 years of service, you pay:	\$ 25.71	\$ 53.47
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#### COBRA

	\$ 52.46	\$ 109.08
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\*\*Benchmark Plan (Dental/Vision)

# 2021 Monthly Premium **RATES**

**For the LACERA Group Medical Insurance Plans  
and Group Dental/Vision Plans**

**Los Angeles County Retiree Healthcare  
Benefits Program—Tier 2**

**Effective July 1, 2021**



Table of Contents

Anthem Blue Cross I . . . . .	19
Anthem Blue Cross II . . . . .	20
Anthem Blue Cross Prudent Buyer Plan . . . . .	21
Anthem Blue Cross III . . . . .	22–23
Cigna Network Model Plan . . . . .	24
SCAN Health Plan . . . . .	25
UnitedHealthcare . . . . .	26
UnitedHealthcare® Group Medicare Advantage (HMO)/UnitedHealthcare . . . . .	27
Kaiser Permanente/Kaiser Permanente Senior Advantage for California Residents . . . . .	28–29
Cigna Dental HMO/Vision . . . . .	30
Cigna Indemnity Dental/Vision . . . . .	31

**County of Los Angeles Contribution—Los Angeles County Retiree Healthcare Benefits Program—Tier 2 (County employees with hire date after June 30, 2014)**

The County subsidy is based on **retiree-only coverage**, regardless of whether the retiree includes an eligible dependent(s) on his or her healthcare plan. If you enroll eligible dependents, you will pay the difference on any monthly premium amount that exceeds the **retiree-only benchmark amount**.

The County contributes an amount equal to a percentage of your healthcare plan premium or the benchmark (Medical: Anthem Blue Cross Plans I and II (Not eligible for Medicare) and Anthem Blue Cross Plan III (Eligible and enrolled in Medicare Parts A and B) and Dental/Vision: Cigna Indemnity Dental/Vision Plan), whichever is less.

Medicare-eligible retirees and eligible dependents **must** enroll in Medicare Parts A and B and in a corresponding Medicare health plan, such as Medicare Advantage Prescription Drug Plan (MA-PD) or the Medicare Supplement Plan.

- For members with 10 years of retirement service credit, the County contributes 40% of your healthcare plan premium or 40% of the benchmark plan rate (Anthem Blue Cross Plans I, II and III for medical and Cigna Indemnity Dental/Vision Plan for dental/vision), whichever is less.
- For each year of retirement service credit beyond 10 years, the County contributes an additional 4% per year of your healthcare plan premium or 4% of the benchmark plan rate (Anthem Blue Cross Plans I, II and III for medical and Cigna Indemnity Dental/Vision Plan for dental/vision), whichever is less, up to a maximum of 100% for a member with 25 years of service credit. You are responsible for any premium difference each month on premiums exceeding the benchmark amounts (including those with 25 years of service).

**Anthem Blue Cross I\*\***

Rates Effective July 1, 2021

Years of Service	Retiree Only	Retiree and Spouse	Retiree, Spouse, and Children	Retiree and Children
Deduction Code	(211)	(212)	(213)	(214)
<b>Less than 10*</b>	<b>\$ 1,273.39</b>	<b>\$ 2,295.06</b>	<b>\$ 2,707.06</b>	<b>\$ 1,684.53</b>
10 to 11*	\$ 764.03	\$ 1,785.70	\$ 2,197.70	\$ 1,175.17
11 to 12*	\$ 713.10	\$ 1,734.77	\$ 2,146.77	\$ 1,124.24
12 to 13*	\$ 662.16	\$ 1,683.83	\$ 2,095.83	\$ 1,073.30
13 to 14	\$ 611.23	\$ 1,632.90	\$ 2,044.90	\$ 1,022.37
14 to 15	\$ 560.29	\$ 1,581.96	\$ 1,993.96	\$ 971.43
15 to 16	\$ 509.36	\$ 1,531.03	\$ 1,943.03	\$ 920.50
16 to 17	\$ 458.42	\$ 1,480.09	\$ 1,892.09	\$ 869.56
17 to 18	\$ 407.48	\$ 1,429.15	\$ 1,841.15	\$ 818.62
18 to 19	\$ 356.55	\$ 1,378.22	\$ 1,790.22	\$ 767.69
19 to 20	\$ 305.61	\$ 1,327.28	\$ 1,739.28	\$ 716.75
20 to 21	\$ 254.68	\$ 1,276.35	\$ 1,688.35	\$ 665.82
21 to 22	\$ 203.74	\$ 1,225.41	\$ 1,637.41	\$ 614.88
22 to 23	\$ 152.81	\$ 1,174.48	\$ 1,586.48	\$ 563.95
23 to 24	\$ 101.87	\$ 1,123.54	\$ 1,535.54	\$ 513.01
24 to 25	\$ 50.94	\$ 1,072.61	\$ 1,484.61	\$ 462.08
25 or more	\$ 0.00	\$ 1,021.67	\$ 1,433.67	\$ 411.14

**Service-Connected Disability Retirement**

\*If you are on a service-connected disability retirement with less than 13 years of service, you pay:

	\$ 636.69	\$ 1,658.36	\$ 2,070.36	\$ 1,047.83
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**COBRA**

	\$ 1,298.86	\$ 2,340.96	\$ 2,761.20	\$ 1,718.22
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\*\*Benchmark Plan (Medical—Non-Medicare-eligible)

## Tier 2

### Anthem Blue Cross II\*\*

Rates Effective July 1, 2021

Years of Service	Retiree Only	Retiree and Spouse	Retiree, Spouse, and Children	Retiree and Children
Deduction Code	(221)	(222)	(223)	(224)
<b>Less than 10*</b>	<b>\$ 1,273.39</b>	<b>\$ 2,295.06</b>	<b>\$ 2,707.06</b>	<b>\$ 1,684.53</b>
10 to 11*	\$ 764.03	\$ 1,785.70	\$ 2,197.70	\$ 1,175.17
11 to 12*	\$ 713.10	\$ 1,734.77	\$ 2,146.77	\$ 1,124.24
12 to 13*	\$ 662.16	\$ 1,683.83	\$ 2,095.83	\$ 1,073.30
13 to 14	\$ 611.23	\$ 1,632.90	\$ 2,044.90	\$ 1,022.37
14 to 15	\$ 560.29	\$ 1,581.96	\$ 1,993.96	\$ 971.43
15 to 16	\$ 509.36	\$ 1,531.03	\$ 1,943.03	\$ 920.50
16 to 17	\$ 458.42	\$ 1,480.09	\$ 1,892.09	\$ 869.56
17 to 18	\$ 407.48	\$ 1,429.15	\$ 1,841.15	\$ 818.62
18 to 19	\$ 356.55	\$ 1,378.22	\$ 1,790.22	\$ 767.69
19 to 20	\$ 305.61	\$ 1,327.28	\$ 1,739.28	\$ 716.75
20 to 21	\$ 254.68	\$ 1,276.35	\$ 1,688.35	\$ 665.82
21 to 22	\$ 203.74	\$ 1,225.41	\$ 1,637.41	\$ 614.88
22 to 23	\$ 152.81	\$ 1,174.48	\$ 1,586.48	\$ 563.95
23 to 24	\$ 101.87	\$ 1,123.54	\$ 1,535.54	\$ 513.01
24 to 25	\$ 50.94	\$ 1,072.61	\$ 1,484.61	\$ 462.08
25 or more	\$ 0.00	\$ 1,021.67	\$ 1,433.67	\$ 411.14

Service-Connected Disability Retirement				
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:				
	\$ 636.69	\$ 1,658.36	\$ 2,070.36	\$ 1,047.83

COBRA				
	\$ 1,298.86	\$ 2,340.96	\$ 2,761.20	\$ 1,718.22

\*\*Benchmark Plan (Medical—Non-Medicare-eligible)

## Tier 2

### Anthem Blue Cross Prudent Buyer Plan

Rates Effective July 1, 2021

Years of Service	Retiree Only	Retiree and Spouse	Retiree, Spouse, and Children	Retiree and Children
Deduction Code	(201)	(202)	(203)	(204)
<b>Less than 10*</b>	<b>\$ 883.07</b>	<b>\$ 1,736.25</b>	<b>\$ 1,959.30</b>	<b>\$ 1,134.63</b>
10 to 11*	\$ 529.84	\$ 1,226.89	\$ 1,449.94	\$ 680.78
11 to 12*	\$ 494.52	\$ 1,175.96	\$ 1,399.01	\$ 635.39
12 to 13*	\$ 459.20	\$ 1,125.02	\$ 1,348.07	\$ 590.01
13 to 14	\$ 423.87	\$ 1,074.09	\$ 1,297.14	\$ 544.62
14 to 15	\$ 388.55	\$ 1,023.15	\$ 1,246.20	\$ 499.24
15 to 16	\$ 353.23	\$ 972.22	\$ 1,195.27	\$ 453.85
16 to 17	\$ 317.91	\$ 921.28	\$ 1,144.33	\$ 408.47
17 to 18	\$ 282.58	\$ 870.34	\$ 1,093.39	\$ 363.08
18 to 19	\$ 247.26	\$ 819.41	\$ 1,042.46	\$ 317.70
19 to 20	\$ 211.94	\$ 768.47	\$ 991.52	\$ 272.31
20 to 21	\$ 176.61	\$ 717.54	\$ 940.59	\$ 226.93
21 to 22	\$ 141.29	\$ 666.60	\$ 889.65	\$ 181.54
22 to 23	\$ 105.97	\$ 615.67	\$ 838.72	\$ 136.16
23 to 24	\$ 70.65	\$ 564.73	\$ 787.78	\$ 90.77
24 to 25	\$ 35.32	\$ 513.80	\$ 736.85	\$ 45.39
25 or more	\$ 0.00	\$ 462.86	\$ 685.91	\$ 0.00

Service-Connected Disability Retirement				
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:				
	\$ 441.53	\$ 1,099.55	\$ 1,322.60	\$ 567.31

COBRA				
	\$ 900.73	\$ 1,770.98	\$ 1,998.49	\$ 1,157.32



**Anthem Blue Cross III (Medicare Supplement Plan)\*\***

Rates Effective July 1, 2021

Years of Service	Retiree Only with Medicare	Retiree and Spouse – 1 with Medicare	Retiree and Spouse – 1 with Medicare	Retiree and Spouse – Both with Medicare	Retiree and Children	Retiree and Children	Retiree, Spouse, and Children – 1 with Medicare	Retiree, Spouse, and Children – 1 with Medicare	Retiree, Spouse, and Children – 2 with Medicare	Retiree, Spouse, and Children – 2 with Medicare	Retiree, Spouse, and Children – each with Medicare
Deduction Code	(240)	(241 <sup>1</sup> /242)	(241/242 <sup>2</sup> )	(243)	(244 <sup>3</sup> /245)	(244/245 <sup>4</sup> )	(246 <sup>5</sup> /247)	(246/247 <sup>6</sup> )	(248 <sup>7</sup> /249)	(248/249 <sup>8</sup> )	(250 <sup>9</sup> )
<b>Less than 10*</b>	<b>\$ 519.08</b>	<b>\$ 1,657.63</b>	<b>\$ 1,657.63</b>	<b>\$ 1,032.26</b>	<b>\$ 928.76</b>	<b>\$ 928.76</b>	<b>\$ 2,067.18</b>	<b>\$ 2,067.18</b>	<b>\$ 1,441.73</b>	<b>\$ 1,441.73</b>	<b>\$ 1,615.64</b>
10 to 11*	\$ 311.45	\$ 1,450.00	\$ 1,148.27	\$ 824.63	\$ 721.13	\$ 557.26	\$ 1,859.55	\$ 1,557.82	\$ 1,234.10	\$ 932.37	\$ 1,408.01
11 to 12*	\$ 290.68	\$ 1,429.23	\$ 1,097.34	\$ 803.86	\$ 700.36	\$ 520.11	\$ 1,838.78	\$ 1,506.89	\$ 1,213.33	\$ 881.44	\$ 1,387.24
12 to 13*	\$ 269.92	\$ 1,408.47	\$ 1,046.40	\$ 783.10	\$ 679.60	\$ 482.96	\$ 1,818.02	\$ 1,455.95	\$ 1,192.57	\$ 830.50	\$ 1,366.48
13 to 14	\$ 249.16	\$ 1,387.71	\$ 995.47	\$ 762.34	\$ 658.84	\$ 445.80	\$ 1,797.26	\$ 1,405.02	\$ 1,171.81	\$ 779.57	\$ 1,345.72
14 to 15	\$ 228.40	\$ 1,366.95	\$ 944.53	\$ 741.58	\$ 638.08	\$ 408.65	\$ 1,776.50	\$ 1,354.08	\$ 1,151.05	\$ 728.63	\$ 1,324.96
15 to 16	\$ 207.63	\$ 1,346.18	\$ 893.60	\$ 720.81	\$ 617.31	\$ 371.50	\$ 1,755.73	\$ 1,303.15	\$ 1,130.28	\$ 677.70	\$ 1,304.19
16 to 17	\$ 186.87	\$ 1,325.42	\$ 842.66	\$ 700.05	\$ 596.55	\$ 334.35	\$ 1,734.97	\$ 1,252.21	\$ 1,109.52	\$ 626.76	\$ 1,283.43
17 to 18	\$ 166.11	\$ 1,304.66	\$ 791.72	\$ 679.29	\$ 575.79	\$ 297.20	\$ 1,714.21	\$ 1,201.27	\$ 1,088.76	\$ 575.82	\$ 1,262.67
18 to 19	\$ 145.34	\$ 1,283.89	\$ 740.79	\$ 658.52	\$ 555.02	\$ 260.05	\$ 1,693.44	\$ 1,150.34	\$ 1,067.99	\$ 524.89	\$ 1,241.90
19 to 20	\$ 124.58	\$ 1,263.13	\$ 689.85	\$ 637.76	\$ 534.26	\$ 222.90	\$ 1,672.68	\$ 1,099.40	\$ 1,047.23	\$ 473.95	\$ 1,221.14
20 to 21	\$ 103.82	\$ 1,242.37	\$ 638.92	\$ 617.00	\$ 513.50	\$ 185.75	\$ 1,651.92	\$ 1,048.47	\$ 1,026.47	\$ 423.02	\$ 1,200.38
21 to 22	\$ 83.05	\$ 1,221.60	\$ 587.98	\$ 596.23	\$ 492.73	\$ 148.60	\$ 1,631.15	\$ 997.53	\$ 1,005.70	\$ 372.08	\$ 1,179.61
22 to 23	\$ 62.29	\$ 1,200.84	\$ 537.05	\$ 575.47	\$ 471.97	\$ 111.45	\$ 1,610.39	\$ 946.60	\$ 984.94	\$ 321.15	\$ 1,158.85
23 to 24	\$ 41.53	\$ 1,180.08	\$ 486.11	\$ 554.71	\$ 451.21	\$ 74.30	\$ 1,589.63	\$ 895.66	\$ 964.18	\$ 270.21	\$ 1,138.09
24 to 25	\$ 20.76	\$ 1,159.31	\$ 435.18	\$ 533.94	\$ 430.44	\$ 37.15	\$ 1,568.86	\$ 844.73	\$ 943.41	\$ 219.28	\$ 1,117.32
25 or more	\$ 0.00	\$ 1,138.55	\$ 384.24	\$ 513.18	\$ 409.68	\$ 0.00	\$ 1,548.10	\$ 793.79	\$ 922.65	\$ 168.34	\$ 1,096.56

<b>Service-Connected Disability Retirement</b>											
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:											
	\$ 259.54	\$ 1,398.09	\$ 1,020.93	\$ 772.72	\$ 669.22	\$ 464.38	\$ 1,807.64	\$ 1,430.48	\$ 1,182.19	\$ 805.03	\$ 1,356.10

<b>COBRA</b>											
	\$ 529.46	\$ 1,690.78	\$ 1,690.78	\$ 1,052.91	\$ 947.34	\$ 947.34	\$ 2,108.52	\$ 2,108.52	\$ 1,470.56	\$ 1,470.56	\$ 1,647.95

<sup>1</sup> Non-Medicare has Anthem Blue Cross I  
<sup>2</sup> Non-Medicare has Anthem Blue Cross II  
<sup>3</sup> Retiree has Medicare; children have Anthem Blue Cross I  
<sup>4</sup> Dependent has Medicare; children have Anthem Blue Cross II  
<sup>5</sup> Non-Medicare has Anthem Blue Cross I  
<sup>6</sup> Non-Medicare has Anthem Blue Cross II  
<sup>7</sup> Children have Anthem Blue Cross I  
<sup>8</sup> Children have Anthem Blue Cross II  
<sup>9</sup> **Please note:** only retirees or eligible survivors will qualify for the Medicare Part B Premium Reimbursement Program (up to the standard amount), approved annually by the Los Angeles County Board of Supervisors.  
**\*\*Benchmark Plan (Medicare-eligible enrolled in Medicare Parts A and B)**

## Tier 2

### Cigna Network Model Plan

Rates Effective July 1, 2021

Years of Service	Retiree Only	Retiree and Spouse	Retiree, Spouse, and Children	Retiree and Children
Deduction Code	(301)	(302)	(303)	(304)
<b>Less than 10*</b>	<b>\$ 1,655.81</b>	<b>\$ 2,989.10</b>	<b>\$ 3,529.49</b>	<b>\$ 2,196.92</b>
10 to 11*	\$ 1,146.45	\$ 2,479.74	\$ 3,020.13	\$ 1,687.56
11 to 12*	\$ 1,095.52	\$ 2,428.81	\$ 2,969.20	\$ 1,636.63
12 to 13*	\$ 1,044.58	\$ 2,377.87	\$ 2,918.26	\$ 1,585.69
13 to 14	\$ 993.65	\$ 2,326.94	\$ 2,867.33	\$ 1,534.76
14 to 15	\$ 942.71	\$ 2,276.00	\$ 2,816.39	\$ 1,483.82
15 to 16	\$ 891.78	\$ 2,225.07	\$ 2,765.46	\$ 1,432.89
16 to 17	\$ 840.84	\$ 2,174.13	\$ 2,714.52	\$ 1,381.95
17 to 18	\$ 789.90	\$ 2,123.19	\$ 2,663.58	\$ 1,331.01
18 to 19	\$ 738.97	\$ 2,072.26	\$ 2,612.65	\$ 1,280.08
19 to 20	\$ 688.03	\$ 2,021.32	\$ 2,561.71	\$ 1,229.14
20 to 21	\$ 637.10	\$ 1,970.39	\$ 2,510.78	\$ 1,178.21
21 to 22	\$ 586.16	\$ 1,919.45	\$ 2,459.84	\$ 1,127.27
22 to 23	\$ 535.23	\$ 1,868.52	\$ 2,408.91	\$ 1,076.34
23 to 24	\$ 484.29	\$ 1,817.58	\$ 2,357.97	\$ 1,025.40
24 to 25	\$ 433.36	\$ 1,766.65	\$ 2,307.04	\$ 974.47
25 or more	\$ 382.42	\$ 1,715.71	\$ 2,256.10	\$ 923.53

#### Service-Connected Disability Retirement

\*If you are on a service-connected disability retirement with less than 13 years of service, you pay:

\$ 1,019.11	\$ 2,352.40	\$ 2,892.79	\$ 1,560.22
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#### COBRA

\$ 1,688.93	\$ 3,048.88	\$ 3,600.08	\$ 2,240.86
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## Tier 2

### SCAN Health Plan

Retirees and eligible dependents enrolled in Medicare Parts A and B only

Rates Effective July 1, 2021

Years of Service	Retiree Only with SCAN	Retiree and 1 Dependent — Both with SCAN
Deduction Code	(611)	(613) <sup>1</sup>
<b>Less than 10*</b>	<b>\$ 283.60</b>	<b>\$ 559.20</b>
10 to 11*	\$ 170.16	\$ 351.57
11 to 12*	\$ 158.82	\$ 330.80
12 to 13*	\$ 147.47	\$ 310.04
13 to 14	\$ 136.13	\$ 289.28
14 to 15	\$ 124.78	\$ 268.52
15 to 16	\$ 113.44	\$ 247.75
16 to 17	\$ 102.10	\$ 226.99
17 to 18	\$ 90.75	\$ 206.23
18 to 19	\$ 79.41	\$ 185.46
19 to 20	\$ 68.06	\$ 164.70
20 to 21	\$ 56.72	\$ 143.94
21 to 22	\$ 45.38	\$ 123.17
22 to 23	\$ 34.03	\$ 102.41
23 to 24	\$ 22.69	\$ 81.65
24 to 25	\$ 11.34	\$ 60.88
25 or more	\$ 0.00	\$ 40.12

#### Service-Connected Disability Retirement

\*If you are on a service-connected disability retirement with less than 13 years of service, you pay:

\$ 141.80	\$ 299.66
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#### COBRA

\$ 289.27	\$ 570.38
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<sup>1</sup> Retiree and 1 Dependent = Retiree and Spouse/Domestic Partner OR Retiree and 1 Child. Both retiree and eligible dependent must be enrolled in Medicare Parts A and B.



## Tier 2

### UnitedHealthcare

For retirees and dependents under age 65 (no Medicare)

Rates Effective July 1, 2021

Years of Service	Retiree Only	Retiree and 1 Dependent	Retiree and 2 or More Dependents
Deduction Code	(707)	(708)	(709)
<b>Less than 10*</b>	<b>\$ 1,268.09</b>	<b>\$ 2,315.42</b>	<b>\$ 2,745.25</b>
10 to 11*	\$ 760.85	\$ 1,806.06	\$ 2,235.89
11 to 12*	\$ 710.13	\$ 1,755.13	\$ 2,184.96
12 to 13*	\$ 659.41	\$ 1,704.19	\$ 2,134.02
13 to 14	\$ 608.68	\$ 1,653.26	\$ 2,083.09
14 to 15	\$ 557.96	\$ 1,602.32	\$ 2,032.15
15 to 16	\$ 507.24	\$ 1,551.39	\$ 1,981.22
16 to 17	\$ 456.51	\$ 1,500.45	\$ 1,930.28
17 to 18	\$ 405.79	\$ 1,449.51	\$ 1,879.34
18 to 19	\$ 355.07	\$ 1,398.58	\$ 1,828.41
19 to 20	\$ 304.34	\$ 1,347.64	\$ 1,777.47
20 to 21	\$ 253.62	\$ 1,296.71	\$ 1,726.54
21 to 22	\$ 202.89	\$ 1,245.77	\$ 1,675.60
22 to 23	\$ 152.17	\$ 1,194.84	\$ 1,624.67
23 to 24	\$ 101.45	\$ 1,143.90	\$ 1,573.73
24 to 25	\$ 50.72	\$ 1,092.97	\$ 1,522.80
25 or more	\$ 0.00	\$ 1,042.03	\$ 1,471.86

Service-Connected Disability Retirement			
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:			
	\$ 634.04	\$ 1,678.72	\$ 2,108.55

COBRA			
	\$ 1,293.45	\$ 2,361.73	\$ 2,800.16

## Tier 2

### UnitedHealthcare® Group Medicare Advantage (HMO)/United Healthcare

For both retirees and eligible dependents who are enrolled in the UnitedHealthcare Group Medicare Advantage (HMO), or a family combination of UnitedHealthcare Group Medicare Advantage (HMO)/UnitedHealthcare

Rates Effective July 1, 2021

Years of Service	Retiree Only with UnitedHealthcare Group Medicare Advantage (HMO)	Retiree and 1 Dependent — 1 with UnitedHealthcare Group Medicare Advantage (HMO)	Retiree and 1 Dependent — Both with UnitedHealthcare Group Medicare Advantage (HMO)	Retiree and 2 or More Dependents — 1 with Medicare and UnitedHealthcare Group Medicare Advantage (HMO)	Retiree and 2 or More Dependents — 2 with UnitedHealthcare Group Medicare Advantage (HMO)
Deduction Code	(701)	(702 <sup>1</sup> )	(703 <sup>1</sup> )	(704 <sup>2</sup> )	(705 <sup>2</sup> )
<b>Less than 10*</b>	<b>\$ 336.45</b>	<b>\$ 1,596.54</b>	<b>\$ 664.90</b>	<b>\$ 1,813.61</b>	<b>\$ 881.97</b>
10 to 11*	\$ 201.87	\$ 1,388.91	\$ 457.27	\$ 1,605.98	\$ 674.34
11 to 12*	\$ 188.41	\$ 1,368.14	\$ 436.50	\$ 1,585.21	\$ 653.57
12 to 13*	\$ 174.95	\$ 1,347.38	\$ 415.74	\$ 1,564.45	\$ 632.81
13 to 14	\$ 161.50	\$ 1,326.62	\$ 394.98	\$ 1,543.69	\$ 612.05
14 to 15	\$ 148.04	\$ 1,305.86	\$ 374.22	\$ 1,522.93	\$ 591.29
15 to 16	\$ 134.58	\$ 1,285.09	\$ 353.45	\$ 1,502.16	\$ 570.52
16 to 17	\$ 121.12	\$ 1,264.33	\$ 332.69	\$ 1,481.40	\$ 549.76
17 to 18	\$ 107.66	\$ 1,243.57	\$ 311.93	\$ 1,460.64	\$ 529.00
18 to 19	\$ 94.21	\$ 1,222.80	\$ 291.16	\$ 1,439.87	\$ 508.23
19 to 20	\$ 80.75	\$ 1,202.04	\$ 270.40	\$ 1,419.11	\$ 487.47
20 to 21	\$ 67.29	\$ 1,181.28	\$ 249.64	\$ 1,398.35	\$ 466.71
21 to 22	\$ 53.83	\$ 1,160.51	\$ 228.87	\$ 1,377.58	\$ 445.94
22 to 23	\$ 40.37	\$ 1,139.75	\$ 208.11	\$ 1,356.82	\$ 425.18
23 to 24	\$ 26.92	\$ 1,118.99	\$ 187.35	\$ 1,336.06	\$ 404.42
24 to 25	\$ 13.46	\$ 1,098.22	\$ 166.58	\$ 1,315.29	\$ 383.65
25 or more	\$ 0.00	\$ 1,077.46	\$ 145.82	\$ 1,294.53	\$ 362.89

Service-Connected Disability Retirement					
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:					
	\$ 168.22	\$ 1,337.00	\$ 405.36	\$ 1,554.07	\$ 622.43

COBRA					
	\$ 343.18	\$ 1,628.47	\$ 678.20	\$ 1,849.88	\$ 899.61

<sup>1</sup> Retiree and 1 Dependent = Retiree and Spouse/Domestic Partner OR Retiree and 1 Child

<sup>2</sup> Retiree and 2 or More Dependents = Retiree, Spouse/Domestic Partner, and 1 or More Children OR Retiree and 2 or More Children

## Tier 2

## Tier 2

### Kaiser Permanente/Kaiser Permanente Senior Advantage for California Residents

Rates Effective July 1, 2021

Years of Service	Retiree Only		Retiree and Family			
	Basic (Under 65)	Retiree with Medicare	Basic (Under 65)	Retiree with Medicare	Dependent with Medicare	Two or More Family Members with Medicare
Deduction Code	(401)	(403)	(411)	(413)	(413)	(418)
<b>Less than 10*</b>	<b>\$ 1,173.13</b>	<b>\$ 261.84</b>	<b>\$ 2,338.26</b>	<b>\$ 1,426.97</b>	<b>\$ 1,426.97</b>	<b>\$ 515.68</b>
10 to 11*	\$ 703.88	\$ 157.10	\$ 1,828.90	\$ 1,219.34	\$ 917.61	\$ 309.41
11 to 12*	\$ 656.95	\$ 146.63	\$ 1,777.97	\$ 1,198.57	\$ 866.68	\$ 288.78
12 to 13*	\$ 610.03	\$ 136.16	\$ 1,727.03	\$ 1,177.81	\$ 815.74	\$ 268.15
13 to 14	\$ 563.10	\$ 125.68	\$ 1,676.10	\$ 1,157.05	\$ 764.81	\$ 247.53
14 to 15	\$ 516.18	\$ 115.21	\$ 1,625.16	\$ 1,136.29	\$ 713.87	\$ 226.90
15 to 16	\$ 469.25	\$ 104.74	\$ 1,574.23	\$ 1,115.52	\$ 662.94	\$ 206.27
16 to 17	\$ 422.33	\$ 94.26	\$ 1,523.29	\$ 1,094.76	\$ 612.00	\$ 185.64
17 to 18	\$ 375.40	\$ 83.79	\$ 1,472.35	\$ 1,074.00	\$ 561.06	\$ 165.02
18 to 19	\$ 328.48	\$ 73.32	\$ 1,421.42	\$ 1,053.23	\$ 510.13	\$ 144.39
19 to 20	\$ 281.55	\$ 62.84	\$ 1,370.48	\$ 1,032.47	\$ 459.19	\$ 123.76
20 to 21	\$ 234.63	\$ 52.37	\$ 1,319.55	\$ 1,011.71	\$ 408.26	\$ 103.14
21 to 22	\$ 187.70	\$ 41.89	\$ 1,268.61	\$ 990.94	\$ 357.32	\$ 82.51
22 to 23	\$ 140.78	\$ 31.42	\$ 1,217.68	\$ 970.18	\$ 306.39	\$ 61.88
23 to 24	\$ 93.85	\$ 20.95	\$ 1,166.74	\$ 949.42	\$ 255.45	\$ 41.25
24 to 25	\$ 46.93	\$ 10.47	\$ 1,115.81	\$ 928.65	\$ 204.52	\$ 20.63
25 or more	\$ 0.00	\$ 0.00	\$ 1,064.87	\$ 907.89	\$ 153.58	\$ 0.00

#### Service-Connected Disability Retirement

\*If you are on a service-connected disability retirement with less than 13 years of service, you pay:

\$ 586.56	\$ 130.92	\$ 1,701.56	\$ 1,167.43	\$ 790.27	\$ 257.84
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#### COBRA

\$ 1,196.59	\$ 267.08	\$ 2,385.03	\$ 1,455.51	\$ 1,455.51	\$ 525.99
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#### Rate Categories and Deduction Codes

- 401 — Basic
- 403 — Senior Advantage
- 411 — All family members are "Basic"
- 413 — One family member is "Senior Advantage"; others are "Basic"
- 418 — Two or more family members are "Senior Advantage"

#### Definitions

"Basic" includes participants who are under age 65.

"Senior Advantage" includes participants who are age 65 or older and who have assigned both Medicare Parts A and B to Kaiser Permanente.

## Tier 2

### Cigna Dental HMO/Vision

Rates Effective July 1, 2021

Years of Service	Retiree Only	Retiree and Dependent(s)
Deduction Code	(901)	(902)
<b>Less than 10*</b>	<b>\$ 46.37</b>	<b>\$ 94.95</b>
10 to 11*	\$ 27.82	\$ 74.38
11 to 12*	\$ 25.97	\$ 72.32
12 to 13*	\$ 24.11	\$ 70.26
13 to 14	\$ 22.26	\$ 68.21
14 to 15	\$ 20.40	\$ 66.15
15 to 16	\$ 18.55	\$ 64.09
16 to 17	\$ 16.69	\$ 62.03
17 to 18	\$ 14.84	\$ 59.98
18 to 19	\$ 12.98	\$ 57.92
19 to 20	\$ 11.13	\$ 55.86
20 to 21	\$ 9.27	\$ 53.81
21 to 22	\$ 7.42	\$ 51.75
22 to 23	\$ 5.56	\$ 49.69
23 to 24	\$ 3.71	\$ 47.63
24 to 25	\$ 1.85	\$ 45.58
25 or more	\$ 0.00	\$ 43.52

#### Service-Connected Disability Retirement

*If you are on a service-connected disability retirement with less than 13 years of service, you pay:	\$ 23.18	\$ 69.23
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#### COBRA

	\$ 47.30	\$ 96.85
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## Tier 2

### Cigna Indemnity Dental/Vision\*\*

Rates Effective July 1, 2021

Years of Service	Retiree Only	Retiree and Dependent(s)
Deduction Code	(501)	(502)
<b>Less than 10*</b>	<b>\$ 51.43</b>	<b>\$ 106.94</b>
10 to 11*	\$ 30.86	\$ 86.37
11 to 12*	\$ 28.80	\$ 84.31
12 to 13*	\$ 26.74	\$ 82.25
13 to 14	\$ 24.69	\$ 80.20
14 to 15	\$ 22.63	\$ 78.14
15 to 16	\$ 20.57	\$ 76.08
16 to 17	\$ 18.51	\$ 74.02
17 to 18	\$ 16.46	\$ 71.97
18 to 19	\$ 14.40	\$ 69.91
19 to 20	\$ 12.34	\$ 67.85
20 to 21	\$ 10.29	\$ 65.80
21 to 22	\$ 8.23	\$ 63.74
22 to 23	\$ 6.17	\$ 61.68
23 to 24	\$ 4.11	\$ 59.62
24 to 25	\$ 2.06	\$ 57.57
25 or more	\$ 0.00	\$ 55.51

#### Service-Connected Disability Retirement

*If you are on a service-connected disability retirement with less than 13 years of service, you pay:	\$ 25.71	\$ 81.22
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#### COBRA

	\$ 52.46	\$ 109.08
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\*\*Benchmark Plan (Dental/Vision)



**L//CERA**



Los Angeles County Employees Retirement Association

# 2021 Monthly Premium **RATES**

**For the LACERA Group Out-of-Area Medical Plans**

**TIER 1 AND TIER 2**

**Effective July 1, 2021**

Kaiser Permanente — Colorado  
Kaiser Permanente — Georgia  
Kaiser Permanente — Hawaii  
Kaiser Permanente — Oregon  
Kaiser Permanente — Washington  
Cigna Preferred with Rx — Phoenix, Arizona

# Tier 1

## Table of Contents

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Kaiser Permanente—Colorado . . . . .	2–3
Kaiser Permanente—Georgia . . . . .	4–7
Kaiser Permanente—Hawaii . . . . .	8–9
Kaiser Permanente—Oregon . . . . .	10–12
Kaiser Permanente—Washington . . . . .	13–14
Cigna Preferred with Rx—Phoenix, Arizona . . . . .	15

### County of Los Angeles Contribution—Tier 1 (County employees with hire date before July 1, 2014)

The County contributes an amount equal to a percentage of your healthcare plan premium or the benchmark Anthem Blue Cross I, Anthem Blue Cross II indemnity medical plans, and the Cigna indemnity dental/vision plan, whichever is less.

- For members with 10 years of retirement service credit, the County contributes 40% of your healthcare plan premium or 40% of the benchmark plan rate (Anthem Blue Cross Plans I and II for medical and Cigna for dental/vision), whichever is less.
- For each year of retirement service credit beyond 10 years, the County contributes an additional 4% per year of your healthcare plan premium or 4% of the benchmark plan rate (Anthem Blue Cross Plans I and II for medical and Cigna for dental/vision), whichever is less, up to a maximum of 100% for a member with 25 years of service credit. You are responsible for any premium difference each month on premiums exceeding the benchmark amounts (including those with 25 years of service).

**NOTE:** The County’s subsidy amount towards a member’s healthcare premium is paid to the LACERA-administered health plan(s) that members choose to enroll in. Cash payment or cash payment towards the healthcare premium in a non-LACERA administered health plan is not an available option.

**Note:** The rates contained in this booklet are subject to approval by the Centers for Medicare & Medicaid Services (CMS) and may be adjusted during the plan year.

# Tier 1

## Kaiser Permanente—Colorado

Rates Effective July 1, 2021

# Tier 1

Years of Service	Retiree Only		Retiree and Family		Retiree and Family			
	(450)	(451)	(453)	(454)	(455)	(457)	(458)	(459)
Deduction Code	(450)	(451)	(453)	(454)	(455)	(457)	(458)	(459)
<b>Less than 10*</b>	<b>\$ 1,028.17</b>	<b>\$ 306.96</b>	<b>\$ 2,272.89</b>	<b>\$ 3,068.62</b>	<b>\$ 1,327.13</b>	<b>\$ 605.92</b>	<b>\$ 2,287.97</b>	<b>\$ 1,626.09</b>
10 to 11*	\$ 616.90	\$ 184.18	\$ 1,363.73	\$ 1,985.80	\$ 796.28	\$ 363.55	\$ 1,372.78	\$ 975.65
11 to 12*	\$ 575.78	\$ 171.90	\$ 1,272.82	\$ 1,877.51	\$ 743.19	\$ 339.32	\$ 1,281.26	\$ 910.61
12 to 13*	\$ 534.65	\$ 159.62	\$ 1,181.90	\$ 1,769.23	\$ 690.11	\$ 315.08	\$ 1,189.74	\$ 845.57
13 to 14	\$ 493.52	\$ 147.34	\$ 1,090.99	\$ 1,660.95	\$ 637.02	\$ 290.84	\$ 1,098.23	\$ 780.52
14 to 15	\$ 452.39	\$ 135.06	\$ 1,000.07	\$ 1,552.67	\$ 583.94	\$ 266.60	\$ 1,006.71	\$ 715.48
15 to 16	\$ 411.27	\$ 122.78	\$ 909.16	\$ 1,444.38	\$ 530.85	\$ 242.37	\$ 915.19	\$ 650.44
16 to 17	\$ 370.14	\$ 110.51	\$ 818.24	\$ 1,336.10	\$ 477.77	\$ 218.13	\$ 823.67	\$ 585.39
17 to 18	\$ 329.01	\$ 98.23	\$ 727.32	\$ 1,227.82	\$ 424.68	\$ 193.89	\$ 732.15	\$ 520.35
18 to 19	\$ 287.89	\$ 85.95	\$ 636.41	\$ 1,119.54	\$ 371.60	\$ 169.66	\$ 640.63	\$ 455.31
19 to 20	\$ 246.76	\$ 73.67	\$ 545.49	\$ 1,011.25	\$ 318.51	\$ 145.42	\$ 549.11	\$ 390.26
20 to 21	\$ 205.63	\$ 61.39	\$ 454.58	\$ 902.97	\$ 265.43	\$ 121.18	\$ 457.59	\$ 325.22
21 to 22	\$ 164.51	\$ 49.11	\$ 363.66	\$ 794.69	\$ 212.34	\$ 96.95	\$ 366.08	\$ 260.17
22 to 23	\$ 123.38	\$ 36.84	\$ 272.75	\$ 686.41	\$ 159.26	\$ 72.71	\$ 274.56	\$ 195.13
23 to 24	\$ 82.25	\$ 24.56	\$ 181.83	\$ 578.12	\$ 106.17	\$ 48.47	\$ 183.04	\$ 130.09
24 to 25	\$ 41.13	\$ 12.28	\$ 90.92	\$ 469.84	\$ 53.09	\$ 24.24	\$ 91.52	\$ 65.04
25 or more	\$ 0.00	\$ 0.00	\$ 0.00	\$ 361.56	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

### Service-Connected Disability Retirement

\*If you are on a service-connected disability retirement with less than 13 years of service, you pay:

\$ 514.08	\$ 153.48	\$ 1,136.44	\$ 1,715.09	\$ 663.56	\$ 302.96	\$ 1,143.98	\$ 813.04
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### COBRA

\$ 1,048.73	\$ 313.10	\$ 2,318.35	\$ 3,129.99	\$ 1,353.67	\$ 618.04	\$ 2,333.73	\$ 1,658.61
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### Rate Categories and Deduction Codes

450 — “Basic” under age 65  
 451 — “Senior Advantage”  
 453 — Two family members are “Basic”  
 454 — Three or more family members are “Basic”  
 455 — One family member is “Senior Advantage”; one is “Basic”

457 — Two family members are “Senior Advantage”  
 458 — One family member is “Senior Advantage”; two or more are “Basic”  
 459 — Two family members are “Senior Advantage”; one or more are “Basic”

### Definitions

“Basic” includes participants who are under age 65.

“Senior Advantage” includes participants who are age 65 or older and who have assigned both Medicare Parts A and B to Kaiser Permanente.

# Tier 1

## Kaiser Permanente—Georgia

Rates Effective July 1, 2021

Years of Service	Retiree Only				Retiree Only		Retiree and Family		
	(440)	(441)	(442)	(443)	(461)	(462)	(444)	(445)	(446)
<b>Less than 10*</b>	<b>\$ 1,132.33</b>	<b>\$ 1,132.33</b>	<b>\$ 1,132.33</b>	<b>\$ 423.47</b>	<b>\$ 1,132.33</b>	<b>\$ 423.47</b>	<b>\$ 1,547.80</b>	<b>\$ 1,547.80</b>	<b>\$ 1,547.80</b>
10 to 11*	\$ 679.40	\$ 679.40	\$ 679.40	\$ 254.08	\$ 679.40	\$ 254.08	\$ 928.68	\$ 928.68	\$ 928.68
11 to 12*	\$ 634.10	\$ 634.10	\$ 634.10	\$ 237.14	\$ 634.10	\$ 237.14	\$ 866.77	\$ 866.77	\$ 866.77
12 to 13*	\$ 588.81	\$ 588.81	\$ 588.81	\$ 220.20	\$ 588.81	\$ 220.20	\$ 804.86	\$ 804.86	\$ 804.86
13 to 14	\$ 543.52	\$ 543.52	\$ 543.52	\$ 203.27	\$ 543.52	\$ 203.27	\$ 742.94	\$ 742.94	\$ 742.94
14 to 15	\$ 498.23	\$ 498.23	\$ 498.23	\$ 186.33	\$ 498.23	\$ 186.33	\$ 681.03	\$ 681.03	\$ 681.03
15 to 16	\$ 452.93	\$ 452.93	\$ 452.93	\$ 169.39	\$ 452.93	\$ 169.39	\$ 619.12	\$ 619.12	\$ 619.12
16 to 17	\$ 407.64	\$ 407.64	\$ 407.64	\$ 152.45	\$ 407.64	\$ 152.45	\$ 557.21	\$ 557.21	\$ 557.21
17 to 18	\$ 362.35	\$ 362.35	\$ 362.35	\$ 135.51	\$ 362.35	\$ 135.51	\$ 495.30	\$ 495.30	\$ 495.30
18 to 19	\$ 317.05	\$ 317.05	\$ 317.05	\$ 118.57	\$ 317.05	\$ 118.57	\$ 433.38	\$ 433.38	\$ 433.38
19 to 20	\$ 271.76	\$ 271.76	\$ 271.76	\$ 101.63	\$ 271.76	\$ 101.63	\$ 371.47	\$ 371.47	\$ 371.47
20 to 21	\$ 226.47	\$ 226.47	\$ 226.47	\$ 84.69	\$ 226.47	\$ 84.69	\$ 309.56	\$ 309.56	\$ 309.56
21 to 22	\$ 181.17	\$ 181.17	\$ 181.17	\$ 67.76	\$ 181.17	\$ 67.76	\$ 247.65	\$ 247.65	\$ 247.65
22 to 23	\$ 135.88	\$ 135.88	\$ 135.88	\$ 50.82	\$ 135.88	\$ 50.82	\$ 185.74	\$ 185.74	\$ 185.74
23 to 24	\$ 90.59	\$ 90.59	\$ 90.59	\$ 33.88	\$ 90.59	\$ 33.88	\$ 123.82	\$ 123.82	\$ 123.82
24 to 25	\$ 45.29	\$ 45.29	\$ 45.29	\$ 16.94	\$ 45.29	\$ 16.94	\$ 61.91	\$ 61.91	\$ 61.91
25 or more	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

### Service-Connected Disability Retirement

\*If you are on a service-connected disability retirement with less than 13 years of service, you pay:

	\$ 566.16	\$ 566.16	\$ 566.16	\$ 211.73	\$ 566.16	\$ 211.73	\$ 773.90	\$ 773.90	\$ 773.90
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### COBRA

	\$ 1,154.98	\$ 1,154.98	\$ 1,154.98	\$ 431.94	\$ 1,154.98	\$ 431.94	\$ 1,578.76	\$ 1,578.76	\$ 1,578.76
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### Rate Categories and Deduction Codes

- 440 — “Basic” over age 65 with Medicare Part B only
- 441 — “Basic” over age 65 with Medicare Part A only (Closed to new enrollments)
- 442 — “Basic” over age 65 without Medicare Parts A or B
- 443 — “Basic” over age 65 — Medicare-eligible who is classified as having renal failure
- 461 — “Basic” under age 65
- 462 — “Senior Advantage”

- 444 — One family member is “Senior Advantage”; one is “Basic” over age 65 with Medicare Part B only
- 445 — One family member is “Senior Advantage”; one is “Basic” over age 65 with Medicare Part A only (Closed to new enrollments)
- 446 — One family member is “Senior Advantage”; one is “Basic” over age 65 without Medicare Parts A and B

### Definitions

“Basic” includes participants who are under age 65.

“Senior Advantage” includes participants who are age 65 or older and who have assigned both Medicare Parts A and B to Kaiser Permanente.



# Tier 1

## Kaiser Permanente—Georgia

Rates Effective July 1, 2021

# Tier 1

Years of Service	Retiree and Family				Retiree and Family			
	(463)	(464)	(465)	(466)	(467)	(468)	(469)	(470)
<b>Less than 10*</b>	<b>\$ 2,256.67</b>	<b>\$ 3,381.00</b>	<b>\$ 1,547.80</b>	<b>\$ 838.94</b>	<b>\$ 2,672.14</b>	<b>\$ 1,963.27</b>	<b>\$ 1,254.41</b>	<b>\$ 2,672.14</b>
10 to 11*	\$ 1,354.00	\$ 2,298.18	\$ 928.68	\$ 503.36	\$ 1,603.28	\$ 1,177.96	\$ 752.65	\$ 1,603.28
11 to 12*	\$ 1,263.74	\$ 2,189.89	\$ 866.77	\$ 469.81	\$ 1,496.40	\$ 1,099.43	\$ 702.47	\$ 1,496.40
12 to 13*	\$ 1,173.47	\$ 2,081.61	\$ 804.86	\$ 436.25	\$ 1,389.51	\$ 1,020.90	\$ 652.29	\$ 1,389.51
13 to 14	\$ 1,083.20	\$ 1,973.33	\$ 742.94	\$ 402.69	\$ 1,282.63	\$ 942.37	\$ 602.12	\$ 1,282.63
14 to 15	\$ 992.93	\$ 1,865.05	\$ 681.03	\$ 369.13	\$ 1,175.74	\$ 863.84	\$ 551.94	\$ 1,175.74
15 to 16	\$ 902.67	\$ 1,756.76	\$ 619.12	\$ 335.58	\$ 1,068.86	\$ 785.31	\$ 501.76	\$ 1,068.86
16 to 17	\$ 812.40	\$ 1,648.48	\$ 557.21	\$ 302.02	\$ 961.97	\$ 706.78	\$ 451.59	\$ 961.97
17 to 18	\$ 722.13	\$ 1,540.20	\$ 495.30	\$ 268.46	\$ 855.08	\$ 628.25	\$ 401.41	\$ 855.08
18 to 19	\$ 631.87	\$ 1,431.92	\$ 433.38	\$ 234.90	\$ 748.20	\$ 549.72	\$ 351.23	\$ 748.20
19 to 20	\$ 541.60	\$ 1,323.63	\$ 371.47	\$ 201.35	\$ 641.31	\$ 471.18	\$ 301.06	\$ 641.31
20 to 21	\$ 451.33	\$ 1,215.35	\$ 309.56	\$ 167.79	\$ 534.43	\$ 392.65	\$ 250.88	\$ 534.43
21 to 22	\$ 361.07	\$ 1,107.07	\$ 247.65	\$ 134.23	\$ 427.54	\$ 314.12	\$ 200.71	\$ 427.54
22 to 23	\$ 270.80	\$ 998.79	\$ 185.74	\$ 100.67	\$ 320.66	\$ 235.59	\$ 150.53	\$ 320.66
23 to 24	\$ 180.53	\$ 890.50	\$ 123.82	\$ 67.12	\$ 213.77	\$ 157.06	\$ 100.35	\$ 213.77
24 to 25	\$ 90.27	\$ 782.22	\$ 61.91	\$ 33.56	\$ 106.89	\$ 78.53	\$ 50.18	\$ 106.89
25 or more	\$ 0.00	\$ 673.94	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

### Service-Connected Disability Retirement

\*If you are on a service-connected disability retirement with less than 13 years of service, you pay:

\$ 1,128.33	\$ 2,027.47	\$ 773.90	\$ 419.47	\$ 1,336.07	\$ 981.63	\$ 627.20	\$ 1,336.07
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### COBRA

\$ 2,301.80	\$ 3,448.62	\$ 1,578.76	\$ 855.72	\$ 2,725.58	\$ 2,002.54	\$ 1,279.50	\$ 2,725.58
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### Rate Categories and Deduction Codes

- 463 — Two family members are "Basic"
- 464 — Three or more family members are "Basic"
- 465 — One family member is "Senior Advantage"; one is "Basic"
- 466 — Two family members are "Senior Advantage"

- 467 — One family member is "Senior Advantage"; two or more are "Basic"
- 468 — Two family members are "Senior Advantage"; one is "Basic"
- 469 — Three or more family members are "Senior Advantage"; one is "Basic"
- 470 — Three or more family members are "Basic"; one is "Senior Advantage"

### Definitions

"Basic" includes participants who are under age 65.

"Senior Advantage" includes participants who are age 65 or older and who have assigned both Medicare Parts A and B to Kaiser Permanente.

# Tier 1

## Kaiser Permanente—Hawaii

Rates Effective July 1, 2021

# Tier 1

Years of Service	Retiree Only			Retiree and Family		Retiree and Family			
	(471)	(472)	(473)	(474)	(475)	(476)	(477)	(478)	(479)
<b>Less than 10*</b>	\$ 941.61	\$ 468.76	\$ 1,819.99	\$ 1,875.23	\$ 2,808.84	\$ 1,402.37	\$ 2,753.60	\$ 929.52	\$ 2,280.75
10 to 11*	\$ 564.97	\$ 281.26	\$ 1,310.63	\$ 1,125.14	\$ 1,726.02	\$ 841.42	\$ 1,835.58	\$ 557.71	\$ 1,368.45
11 to 12*	\$ 527.30	\$ 262.51	\$ 1,259.70	\$ 1,050.13	\$ 1,617.73	\$ 785.33	\$ 1,743.77	\$ 520.53	\$ 1,277.22
12 to 13*	\$ 489.64	\$ 243.76	\$ 1,208.76	\$ 975.12	\$ 1,509.45	\$ 729.23	\$ 1,651.97	\$ 483.35	\$ 1,185.99
13 to 14	\$ 451.97	\$ 225.00	\$ 1,157.83	\$ 900.11	\$ 1,401.17	\$ 673.14	\$ 1,560.17	\$ 446.17	\$ 1,094.76
14 to 15	\$ 414.31	\$ 206.25	\$ 1,106.89	\$ 825.10	\$ 1,292.89	\$ 617.04	\$ 1,468.37	\$ 408.99	\$ 1,003.53
15 to 16	\$ 376.64	\$ 187.50	\$ 1,055.96	\$ 750.09	\$ 1,184.60	\$ 560.95	\$ 1,376.56	\$ 371.81	\$ 912.30
16 to 17	\$ 338.98	\$ 168.75	\$ 1,005.02	\$ 675.08	\$ 1,076.32	\$ 504.85	\$ 1,284.76	\$ 334.63	\$ 821.07
17 to 18	\$ 301.32	\$ 150.00	\$ 954.08	\$ 600.07	\$ 968.04	\$ 448.76	\$ 1,192.96	\$ 297.45	\$ 729.84
18 to 19	\$ 263.65	\$ 131.25	\$ 903.15	\$ 525.06	\$ 859.76	\$ 392.66	\$ 1,101.16	\$ 260.27	\$ 638.61
19 to 20	\$ 225.99	\$ 112.50	\$ 852.21	\$ 450.06	\$ 751.47	\$ 336.57	\$ 1,009.35	\$ 223.08	\$ 547.38
20 to 21	\$ 188.32	\$ 93.75	\$ 801.28	\$ 375.05	\$ 643.19	\$ 280.47	\$ 917.55	\$ 185.90	\$ 456.15
21 to 22	\$ 150.66	\$ 75.00	\$ 750.34	\$ 300.04	\$ 534.91	\$ 224.38	\$ 825.75	\$ 148.72	\$ 364.92
22 to 23	\$ 112.99	\$ 56.25	\$ 699.41	\$ 225.03	\$ 426.63	\$ 168.28	\$ 733.95	\$ 111.54	\$ 273.69
23 to 24	\$ 75.33	\$ 37.50	\$ 648.47	\$ 150.02	\$ 318.34	\$ 112.19	\$ 642.14	\$ 74.36	\$ 182.46
24 to 25	\$ 37.66	\$ 18.75	\$ 597.54	\$ 75.01	\$ 210.06	\$ 56.09	\$ 550.34	\$ 37.18	\$ 91.23
25 or more	\$ 0.00	\$ 0.00	\$ 546.60	\$ 0.00	\$ 101.78	\$ 0.00	\$ 458.54	\$ 0.00	\$ 0.00

### Service-Connected Disability Retirement

\*If you are on a service-connected disability retirement with less than 13 years of service, you pay:

\$ 470.80	\$ 234.38	\$ 1,183.29	\$ 937.61	\$ 1,455.31	\$ 701.18	\$ 1,606.07	\$ 464.76	\$ 1,140.37
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### COBRA

\$ 960.44	\$ 478.14	\$ 1,856.39	\$ 1,912.73	\$ 2,865.02	\$ 1,430.42	\$ 2,808.67	\$ 948.11	\$ 2,326.37
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### Rate Categories and Deduction Codes

- 471 – “Basic” under age 65
- 472 – “Senior Advantage”
- 473 – Over age 65 without Medicare Parts A or B
- 474 – Two family members are “Basic”
- 475 – Three or more family members are “Basic”
- 476 – One family member is “Senior Advantage”; one is “Basic”

- 477 – One family member is “Basic” under age 65; one is over age 65 without Medicare Parts A or B
- 478 – Two family members are “Senior Advantage”
- 479 – One family member is “Senior Advantage”; one is over age 65 without Medicare Parts A or B

### Definitions

“Basic” includes participants who are under age 65.

“Senior Advantage” includes participants who are age 65 or older and who have assigned both Medicare Parts A and B to Kaiser Permanente.

# Tier 1

## Kaiser Permanente—Oregon

Rates Effective July 1, 2021

Years of Service	Retiree Only					Retiree and Family					
	(481)	(482)	(483)	(489)	(490)	(484)	(485)	(486)	(488)	(491)	(492)
<b>Less than 10*</b>	\$ 1,154.66	\$ 479.36	\$ 1,347.32	\$ 1,096.82	\$ 1,347.32	\$ 2,301.32	\$ 3,447.98	\$ 1,626.02	\$ 950.72	\$ 1,568.18	\$ 1,818.68
10 to 11*	\$ 692.80	\$ 287.62	\$ 837.96	\$ 658.09	\$ 837.96	\$ 1,383.30	\$ 2,365.16	\$ 975.61	\$ 570.43	\$ 940.91	\$ 1,091.21
11 to 12*	\$ 646.61	\$ 268.44	\$ 787.03	\$ 614.22	\$ 787.03	\$ 1,291.49	\$ 2,256.87	\$ 910.57	\$ 532.40	\$ 878.18	\$ 1,018.46
12 to 13*	\$ 600.42	\$ 249.27	\$ 736.09	\$ 570.35	\$ 736.09	\$ 1,199.69	\$ 2,148.59	\$ 845.53	\$ 494.37	\$ 815.45	\$ 945.71
13 to 14	\$ 554.24	\$ 230.09	\$ 685.16	\$ 526.47	\$ 685.16	\$ 1,107.89	\$ 2,040.31	\$ 780.49	\$ 456.35	\$ 752.73	\$ 872.97
14 to 15	\$ 508.05	\$ 210.92	\$ 634.22	\$ 482.60	\$ 634.22	\$ 1,016.09	\$ 1,932.03	\$ 715.45	\$ 418.32	\$ 690.00	\$ 800.22
15 to 16	\$ 461.86	\$ 191.74	\$ 583.29	\$ 438.73	\$ 583.29	\$ 924.28	\$ 1,823.74	\$ 650.41	\$ 380.29	\$ 627.27	\$ 727.47
16 to 17	\$ 415.68	\$ 172.57	\$ 532.35	\$ 394.86	\$ 532.35	\$ 832.48	\$ 1,715.46	\$ 585.37	\$ 342.26	\$ 564.54	\$ 654.72
17 to 18	\$ 369.49	\$ 153.40	\$ 481.41	\$ 350.98	\$ 481.41	\$ 740.68	\$ 1,607.18	\$ 520.33	\$ 304.23	\$ 501.82	\$ 581.98
18 to 19	\$ 323.30	\$ 134.22	\$ 430.48	\$ 307.11	\$ 430.48	\$ 648.88	\$ 1,498.90	\$ 455.29	\$ 266.20	\$ 439.09	\$ 509.23
19 to 20	\$ 277.12	\$ 115.05	\$ 379.54	\$ 263.24	\$ 379.54	\$ 557.07	\$ 1,390.61	\$ 390.24	\$ 228.17	\$ 376.36	\$ 436.48
20 to 21	\$ 230.93	\$ 95.87	\$ 328.61	\$ 219.36	\$ 328.61	\$ 465.27	\$ 1,282.33	\$ 325.20	\$ 190.14	\$ 313.64	\$ 363.74
21 to 22	\$ 184.75	\$ 76.70	\$ 277.67	\$ 175.49	\$ 277.67	\$ 373.47	\$ 1,174.05	\$ 260.16	\$ 152.12	\$ 250.91	\$ 290.99
22 to 23	\$ 138.56	\$ 57.52	\$ 226.74	\$ 131.62	\$ 226.74	\$ 281.67	\$ 1,065.77	\$ 195.12	\$ 114.09	\$ 188.18	\$ 218.24
23 to 24	\$ 92.37	\$ 38.35	\$ 175.80	\$ 87.75	\$ 175.80	\$ 189.86	\$ 957.48	\$ 130.08	\$ 76.06	\$ 125.45	\$ 145.49
24 to 25	\$ 46.19	\$ 19.17	\$ 124.87	\$ 43.87	\$ 124.87	\$ 98.06	\$ 849.20	\$ 65.04	\$ 38.03	\$ 62.73	\$ 72.75
25 or more	\$ 0.00	\$ 0.00	\$ 73.93	\$ 0.00	\$ 73.93	\$ 6.26	\$ 740.92	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
<b>Service-Connected Disability Retirement</b>											
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:											
	\$ 577.33	\$ 239.68	\$ 710.62	\$ 548.41	\$ 710.62	\$ 1,153.79	\$ 2,094.45	\$ 813.01	\$ 475.36	\$ 784.09	\$ 909.34
<b>COBRA</b>											
	\$ 1,177.75	\$ 488.95	\$ 1,374.27	\$ 1,118.76	\$ 1,374.27	\$ 2,347.35	\$ 3,516.94	\$ 1,658.54	\$ 969.73	\$ 1,599.54	\$ 1,855.05

### Rate Categories and Deduction Codes

- 481 — “Basic” under age 65
- 482 — “Senior Advantage”
- 483 — Over age 65 without Medicare Parts A or B
- 489 — Over age 65 with Medicare Part A only (Closed to new enrollments)
- 490 — Over age 65 with Medicare Part B only
- 484 — Two family members are “Basic”
- 485 — Three or more family members are “Basic”

- 486 — One family member is “Senior Advantage”; one is “Basic”
- 488 — Two family members are “Senior Advantage”
- 491 — One family member is “Senior Advantage”; one is over age 65 with Medicare Part A only (Closed to new enrollments)
- 492 — One family member is “Senior Advantage”; one is over age 65 without Medicare Parts A or B

### Definitions

“Basic” includes participants who are under age 65.

“Senior Advantage” includes participants who are age 65 or older and who have assigned both Medicare Parts A and B to Kaiser Permanente.

# Tier 1

## Kaiser Permanente—Oregon

Rates Effective July 1, 2021

Years of Service	Retiree and Family					
	(493)	(494)	(495)	(496)	(497)	(498)
<b>Less than 10*</b>	<b>\$ 2,772.68</b>	<b>\$ 2,097.38</b>	<b>\$ 2,686.64</b>	<b>\$ 2,185.64</b>	<b>\$ 2,243.48</b>	<b>\$ 2,493.98</b>
10 to 11*	\$ 1,689.86	\$ 1,258.43	\$ 1,768.62	\$ 1,311.38	\$ 1,346.09	\$ 1,575.96
11 to 12*	\$ 1,581.57	\$ 1,174.53	\$ 1,676.81	\$ 1,223.96	\$ 1,256.35	\$ 1,484.15
12 to 13*	\$ 1,473.29	\$ 1,090.64	\$ 1,585.01	\$ 1,136.53	\$ 1,166.61	\$ 1,392.35
13 to 14	\$ 1,365.01	\$ 1,006.74	\$ 1,493.21	\$ 1,049.11	\$ 1,076.87	\$ 1,300.55
14 to 15	\$ 1,256.73	\$ 922.85	\$ 1,401.41	\$ 961.68	\$ 987.13	\$ 1,208.75
15 to 16	\$ 1,148.44	\$ 838.95	\$ 1,309.60	\$ 874.26	\$ 897.39	\$ 1,116.94
16 to 17	\$ 1,040.16	\$ 755.06	\$ 1,217.80	\$ 786.83	\$ 807.65	\$ 1,025.14
17 to 18	\$ 931.88	\$ 671.16	\$ 1,126.00	\$ 699.40	\$ 717.91	\$ 933.34
18 to 19	\$ 823.60	\$ 587.27	\$ 1,034.20	\$ 611.98	\$ 628.17	\$ 841.54
19 to 20	\$ 715.31	\$ 503.37	\$ 942.39	\$ 524.55	\$ 538.44	\$ 749.73
20 to 21	\$ 607.03	\$ 419.48	\$ 850.59	\$ 437.13	\$ 448.70	\$ 657.93
21 to 22	\$ 498.75	\$ 335.58	\$ 758.79	\$ 349.70	\$ 358.96	\$ 566.13
22 to 23	\$ 390.47	\$ 251.69	\$ 666.99	\$ 262.28	\$ 269.22	\$ 474.33
23 to 24	\$ 282.18	\$ 167.79	\$ 575.18	\$ 174.85	\$ 179.48	\$ 382.52
24 to 25	\$ 173.90	\$ 83.90	\$ 483.38	\$ 87.43	\$ 89.74	\$ 290.72
25 or more	\$ 65.62	\$ 0.00	\$ 391.58	\$ 0.00	\$ 0.00	\$ 198.92

### Service-Connected Disability Retirement

\*If you are on a service-connected disability retirement with less than 13 years of service, you pay:

\$ 1,419.15	\$ 1,048.69	\$ 1,539.11	\$ 1,092.82	\$ 1,121.74	\$ 1,346.45
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### COBRA

\$ 2,828.13	\$ 2,139.33	\$ 2,740.37	\$ 2,229.35	\$ 2,288.35	\$ 2,543.86
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### Rate Categories and Deduction Codes

- |  |  |
|--|--|
| 493 — One family member is "Senior Advantage"; two or more are "Basic" | 496 — Two family members are over age 65 with Medicare Part A only (Closed to new enrollments)               |
| 494 — Two family members are "Senior Advantage"; one is "Basic"        | 497 — One family member is "Basic"; one is over age 65 with Medicare Part A only (Closed to new enrollments) |
| 495 — Two family members are over age 65 without Medicare Parts A or B | 498 — One family member is "Basic"; one is over age 65 without Medicare Parts A or B                         |

# Tier 1

## Kaiser Permanente—Washington

Rates Effective July 1, 2021

Years of Service	Retiree and Family				
	(393)	(394)	(395)	(396)	(397)
<b>Less than 10*</b>	<b>\$ 1,242.34</b>	<b>\$ 435.70</b>	<b>\$ 2,313.00</b>	<b>\$ 3,867.64</b>	<b>\$ 1,506.36</b>
10 to 11*	\$ 745.40	\$ 261.42	\$ 1,394.98	\$ 2,784.82	\$ 903.82
11 to 12*	\$ 695.71	\$ 243.99	\$ 1,303.17	\$ 2,676.53	\$ 843.56
12 to 13*	\$ 646.02	\$ 226.56	\$ 1,211.37	\$ 2,568.25	\$ 783.31
13 to 14	\$ 596.32	\$ 209.14	\$ 1,119.57	\$ 2,459.97	\$ 723.05
14 to 15	\$ 546.63	\$ 191.71	\$ 1,027.77	\$ 2,351.69	\$ 662.80
15 to 16	\$ 496.94	\$ 174.28	\$ 935.96	\$ 2,243.40	\$ 602.54
16 to 17	\$ 447.24	\$ 156.85	\$ 844.16	\$ 2,135.12	\$ 542.29
17 to 18	\$ 397.55	\$ 139.42	\$ 752.36	\$ 2,026.84	\$ 482.04
18 to 19	\$ 347.86	\$ 122.00	\$ 660.56	\$ 1,918.56	\$ 421.78
19 to 20	\$ 298.16	\$ 104.57	\$ 568.75	\$ 1,810.27	\$ 361.53
20 to 21	\$ 248.47	\$ 87.14	\$ 476.95	\$ 1,701.99	\$ 301.27
21 to 22	\$ 198.77	\$ 69.71	\$ 385.15	\$ 1,593.71	\$ 241.02
22 to 23	\$ 149.08	\$ 52.28	\$ 293.35	\$ 1,485.43	\$ 180.76
23 to 24	\$ 99.39	\$ 34.86	\$ 201.54	\$ 1,377.14	\$ 120.51
24 to 25	\$ 49.69	\$ 17.43	\$ 109.74	\$ 1,268.86	\$ 60.25
25 or more	\$ 0.00	\$ 0.00	\$ 17.94	\$ 1,160.58	\$ 0.00

### Service-Connected Disability Retirement

\*If you are on a service-connected disability retirement with less than 13 years of service, you pay:

\$ 621.17	\$ 217.85	\$ 1,165.47	\$ 2,514.11	\$ 753.18
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### COBRA

\$ 1,267.19	\$ 444.41	\$ 2,359.26	\$ 3,944.99	\$ 1,536.49
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### Rate Categories and Deduction Codes

- |                                      |   |
|--------------------------------------|---|
| 393 — "Basic" under age 65           | 396 — Three or more family members are "Basic"                |
| 394 — "Senior Advantage"             | 397 — One family member is "Senior Advantage"; one is "Basic" |
| 395 — Two family members are "Basic" |   |

## Tier 1

### Kaiser Permanente—Washington

Rates Effective July 1, 2021

Years of Service	Retiree and Family		
	(398)	(399)	(400)
Deduction Code	(398)	(399)	(400)
<b>Less than 10*</b>	<b>\$ 863.40</b>	<b>\$ 3,061.00</b>	<b>\$ 2,418.04</b>
10 to 11*	\$ 518.04	\$ 1,978.18	\$ 1,450.82
11 to 12*	\$ 483.50	\$ 1,869.89	\$ 1,354.10
12 to 13*	\$ 448.97	\$ 1,761.61	\$ 1,257.38
13 to 14	\$ 414.43	\$ 1,653.33	\$ 1,160.66
14 to 15	\$ 379.90	\$ 1,545.05	\$ 1,063.94
15 to 16	\$ 345.36	\$ 1,436.76	\$ 967.22
16 to 17	\$ 310.82	\$ 1,328.48	\$ 870.49
17 to 18	\$ 276.29	\$ 1,220.20	\$ 773.77
18 to 19	\$ 241.75	\$ 1,111.92	\$ 677.05
19 to 20	\$ 207.22	\$ 1,003.63	\$ 580.33
20 to 21	\$ 172.68	\$ 895.35	\$ 483.61
21 to 22	\$ 138.14	\$ 787.07	\$ 386.89
22 to 23	\$ 103.61	\$ 678.79	\$ 290.16
23 to 24	\$ 69.07	\$ 570.50	\$ 193.44
24 to 25	\$ 34.54	\$ 462.22	\$ 96.72
25 or more	\$ 0.00	\$ 353.94	\$ 0.00
<b>Service-Connected Disability Retirement</b>			
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:			
	\$ 431.70	\$ 1,707.47	\$ 1,209.02
<b>COBRA</b>			
	\$ 880.67	\$ 3,122.22	\$ 2,466.40

#### Rate Categories and Deduction Codes

398 — Two family members are "Senior Advantage"

399 — One family member is "Senior Advantage"; two or more are "Basic"

400 — Two family members are "Senior Advantage"; one or more are "Basic"

## Tier 1

### Cigna Preferred with Rx—Phoenix, AZ

Rates Effective July 1, 2021

Years of Service	Retiree Only with Medicare	Retiree and Spouse/Domestic Partner — 1 with Medicare	Retiree and Spouse/Domestic Partner — Both with Medicare	Retiree and Children	Retiree, Spouse/Domestic Partner, and Children — 1 with Medicare	Retiree, Spouse/Domestic Partner, and Children — 2 with Medicare
	(321)	(322)	(324)	(325)	(327)	(329)
Deduction Code	(321)	(322)	(324)	(325)	(327)	(329)
<b>Less than 10*</b>	<b>\$ 384.49</b>	<b>\$ 1,717.78</b>	<b>\$ 760.98</b>	<b>\$ 926.28</b>	<b>\$ 2,258.85</b>	<b>\$ 1,342.91</b>
10 to 11*	\$ 230.69	\$ 1,030.67	\$ 456.59	\$ 555.77	\$ 1,355.31	\$ 805.75
11 to 12*	\$ 215.31	\$ 961.96	\$ 426.15	\$ 518.72	\$ 1,264.96	\$ 752.03
12 to 13*	\$ 199.93	\$ 893.25	\$ 395.71	\$ 481.67	\$ 1,174.60	\$ 698.31
13 to 14	\$ 184.56	\$ 824.53	\$ 365.27	\$ 444.61	\$ 1,084.25	\$ 644.60
14 to 15	\$ 169.18	\$ 755.82	\$ 334.83	\$ 407.56	\$ 993.89	\$ 590.88
15 to 16	\$ 153.80	\$ 687.11	\$ 304.39	\$ 370.51	\$ 903.54	\$ 537.16
16 to 17	\$ 138.42	\$ 618.40	\$ 273.95	\$ 333.46	\$ 813.19	\$ 483.45
17 to 18	\$ 123.04	\$ 549.69	\$ 243.51	\$ 296.41	\$ 722.83	\$ 429.73
18 to 19	\$ 107.66	\$ 480.98	\$ 213.07	\$ 259.36	\$ 632.48	\$ 376.01
19 to 20	\$ 92.28	\$ 412.27	\$ 182.64	\$ 222.31	\$ 542.12	\$ 322.30
20 to 21	\$ 76.90	\$ 343.56	\$ 152.20	\$ 185.26	\$ 451.77	\$ 268.58
21 to 22	\$ 61.52	\$ 274.84	\$ 121.76	\$ 148.20	\$ 361.42	\$ 214.87
22 to 23	\$ 46.14	\$ 206.13	\$ 91.32	\$ 111.15	\$ 271.06	\$ 161.15
23 to 24	\$ 30.76	\$ 137.42	\$ 60.88	\$ 74.10	\$ 180.71	\$ 107.43
24 to 25	\$ 15.38	\$ 68.71	\$ 30.44	\$ 37.05	\$ 90.35	\$ 53.72
25 or more	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
<b>Service-Connected Disability Retirement</b>						
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:						
	\$ 192.24	\$ 858.89	\$ 380.49	\$ 463.14	\$ 1,129.42	\$ 671.45
<b>COBRA</b>						
	\$ 392.18	\$ 1,752.14	\$ 776.20	\$ 944.81	\$ 2,304.03	\$ 1,369.77



# 2021 Monthly Premium **RATES**

For the LACERA Group Out-of-Area Plans

## Los Angeles County Retiree Healthcare Benefits Program—Tier 2

**Effective July 1, 2021**

- Kaiser Permanente — Colorado
- Kaiser Permanente — Georgia
- Kaiser Permanente — Hawaii
- Kaiser Permanente — Oregon
- Kaiser Permanente — Washington
- Cigna Preferred with Rx — Phoenix, Arizona



## Table of Contents

Kaiser Permanente—Colorado . . . . .	20–21
Kaiser Permanente—Georgia . . . . .	22–25
Kaiser Permanente—Hawaii . . . . .	26–27
Kaiser Permanente—Oregon . . . . .	28–30
Kaiser Permanente—Washington . . . . .	31–32
Cigna Preferred with Rx—Phoenix, Arizona . . . . .	33

### County of Los Angeles Contribution—Los Angeles County Retiree Healthcare Benefits Program—Tier 2 (County employees with hire date after June 30, 2014)

The County subsidy is based on **retiree-only coverage**, regardless of whether the retiree includes an eligible dependent(s) on his or her healthcare plan. If you enroll eligible dependents, you will pay the difference on any monthly premium amount that exceeds the **retiree-only benchmark amount**.

The County contributes an amount equal to a percentage of your healthcare plan premium or the benchmark (Medical: Anthem Blue Cross Plans I and II (Not eligible for Medicare) and Anthem Blue Cross Plan III (Eligible and enrolled in Medicare Parts A and B) and Dental/Vision: Cigna Indemnity Dental/Vision Plan), whichever is less.

Medicare-eligible retirees and eligible dependents **must** enroll in Medicare Parts A and B and in a corresponding Medicare health plan, such as Medicare Advantage Prescription Drug Plan (MA-PD) or the Medicare Supplement Plan.

- For members with 10 years of retirement service credit, the County contributes 40% of your healthcare plan premium or 40% of the benchmark plan rate (Anthem Blue Cross Plans I, II and III for medical and Cigna Indemnity Dental/Vision Plan for dental/vision), whichever is less.
- For each year of retirement service credit beyond 10 years, the County contributes an additional 4% per year of your healthcare plan premium or 4% of the benchmark plan rate (Anthem Blue Cross Plans I, II and III for medical and Cigna Indemnity Dental/Vision Plan for dental/vision), whichever is less, up to a maximum of 100% for a member with 25 years of service credit. You are responsible for any premium difference each month on premiums exceeding the benchmark amounts (including those with 25 years of service).

**Note:** The rates contained in this booklet are subject to approval by the Centers for Medicare & Medicaid Services (CMS) and may be adjusted during the plan year.

## Tier 2

### Kaiser Permanente—Colorado

Rates Effective July 1, 2021

Years of Service	Retiree Only		Retiree and Family		Retiree and Family - Retiree with Medicare	Retiree and Family - Dependent with Medicare	Retiree and Family	Retiree and Family - Retiree with Medicare	Retiree and Family - Dependent with Medicare	Retiree and Family - Retiree with Medicare	Retiree and Family - Dependent with Medicare
Deduction Code	(450)	(451)	(453)	(454)	(455)	(455)	(457)	(458)	(458)	(459)	(459)
<b>Less than 10*</b>	<b>\$ 1,028.17</b>	<b>\$ 306.96</b>	<b>\$ 2,272.89</b>	<b>\$ 3,068.62</b>	<b>\$ 1,327.13</b>	<b>\$ 1,327.13</b>	<b>\$ 605.92</b>	<b>\$ 2,287.97</b>	<b>\$ 2,287.97</b>	<b>\$ 1,626.09</b>	<b>\$ 1,626.09</b>
10 to 11*	\$ 616.90	\$ 184.18	\$ 1,763.53	\$ 2,559.26	\$ 1,119.50	\$ 817.77	\$ 398.29	\$ 2,080.34	\$ 1,778.61	\$ 1,418.46	\$ 1,116.73
11 to 12*	\$ 575.78	\$ 171.90	\$ 1,712.60	\$ 2,508.33	\$ 1,098.73	\$ 766.84	\$ 377.52	\$ 2,059.57	\$ 1,727.68	\$ 1,397.69	\$ 1,065.80
12 to 13*	\$ 534.65	\$ 159.62	\$ 1,661.66	\$ 2,457.39	\$ 1,077.97	\$ 715.90	\$ 356.76	\$ 2,038.81	\$ 1,676.74	\$ 1,376.93	\$ 1,014.86
13 to 14	\$ 493.52	\$ 147.34	\$ 1,610.73	\$ 2,406.46	\$ 1,057.21	\$ 664.97	\$ 336.00	\$ 2,018.05	\$ 1,625.81	\$ 1,356.17	\$ 963.93
14 to 15	\$ 452.39	\$ 135.06	\$ 1,559.79	\$ 2,355.52	\$ 1,036.45	\$ 614.03	\$ 315.24	\$ 1,997.29	\$ 1,574.87	\$ 1,335.41	\$ 912.99
15 to 16	\$ 411.27	\$ 122.78	\$ 1,508.86	\$ 2,304.59	\$ 1,015.68	\$ 563.10	\$ 294.47	\$ 1,976.52	\$ 1,523.94	\$ 1,314.64	\$ 862.06
16 to 17	\$ 370.14	\$ 110.51	\$ 1,457.92	\$ 2,253.65	\$ 994.92	\$ 512.16	\$ 273.71	\$ 1,955.76	\$ 1,473.00	\$ 1,293.88	\$ 811.12
17 to 18	\$ 329.01	\$ 98.23	\$ 1,406.98	\$ 2,202.71	\$ 974.16	\$ 461.22	\$ 252.95	\$ 1,935.00	\$ 1,422.06	\$ 1,273.12	\$ 760.18
18 to 19	\$ 287.89	\$ 85.95	\$ 1,356.05	\$ 2,151.78	\$ 953.39	\$ 410.29	\$ 232.18	\$ 1,914.23	\$ 1,371.13	\$ 1,252.35	\$ 709.25
19 to 20	\$ 246.76	\$ 73.67	\$ 1,305.11	\$ 2,100.84	\$ 932.63	\$ 359.35	\$ 211.42	\$ 1,893.47	\$ 1,320.19	\$ 1,231.59	\$ 658.31
20 to 21	\$ 205.63	\$ 61.39	\$ 1,254.18	\$ 2,049.91	\$ 911.87	\$ 308.42	\$ 190.66	\$ 1,872.71	\$ 1,269.26	\$ 1,210.83	\$ 607.38
21 to 22	\$ 164.51	\$ 49.11	\$ 1,203.24	\$ 1,998.97	\$ 891.10	\$ 257.48	\$ 169.89	\$ 1,851.94	\$ 1,218.32	\$ 1,190.06	\$ 556.44
22 to 23	\$ 123.38	\$ 36.84	\$ 1,152.31	\$ 1,948.04	\$ 870.34	\$ 206.55	\$ 149.13	\$ 1,831.18	\$ 1,167.39	\$ 1,169.30	\$ 505.51
23 to 24	\$ 82.25	\$ 24.56	\$ 1,101.37	\$ 1,897.10	\$ 849.58	\$ 155.61	\$ 128.37	\$ 1,810.42	\$ 1,116.45	\$ 1,148.54	\$ 454.57
24 to 25	\$ 41.13	\$ 12.28	\$ 1,050.44	\$ 1,846.17	\$ 828.81	\$ 104.68	\$ 107.60	\$ 1,789.65	\$ 1,065.52	\$ 1,127.77	\$ 403.64
25 or more	\$ 0.00	\$ 0.00	\$ 999.50	\$ 1,795.23	\$ 808.05	\$ 53.74	\$ 86.84	\$ 1,768.89	\$ 1,014.58	\$ 1,107.01	\$ 352.70

Service-Connected Disability Retirement											
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:											
	\$ 514.08	\$ 153.48	\$ 1,636.19	\$ 2,431.92	\$ 1,067.59	\$ 690.43	\$ 346.38	\$ 2,028.43	\$ 1,651.27	\$ 1,366.55	\$ 989.39

COBRA											
	\$ 1,048.73	\$ 313.10	\$ 2,318.35	\$ 3,129.99	\$ 1,353.67	\$ 1,353.67	\$ 618.04	\$ 2,333.73	\$ 2,333.73	\$ 1,658.61	\$ 1,658.61

#### Rate Categories and Deduction Codes

450 — “Basic” under age 65  
 451 — “Senior Advantage”  
 453 — Two family members are “Basic”  
 454 — Three or more family members are “Basic”  
 455 — One family member is “Senior Advantage”; one is “Basic”

457 — Two family members are “Senior Advantage”  
 458 — One family member is “Senior Advantage”; two or more are “Basic”  
 459 — Two family members are “Senior Advantage”; one or more are “Basic”

#### Definitions

“Basic” includes participants who are under age 65.

“Senior Advantage” includes participants who are age 65 or older and who have assigned both Medicare Parts A and B to Kaiser Permanente.



## Tier 2

### Kaiser Permanente—Georgia

Rates Effective July 1, 2021

Years of Service	Retiree Only		Retiree and Family - Retiree with Medicare		Retiree and Family - Dependent with Medicare		Retiree and Family - Retiree with Medicare		Retiree and Family - Dependent with Medicare	
Deduction Code	(443)	(461)	(462)	(463)	(463)	(464)	(465)	(465)	(465)	(465)
<b>Less than 10*</b>	\$ 423.47	\$ 1,132.33	\$ 423.47	\$ 2,256.67	\$ 2,256.67	\$ 3,381.00	\$ 1,547.80	\$ 1,547.80	\$ 1,547.80	\$ 1,547.80
10 to 11*	\$ 254.08	\$ 679.40	\$ 254.08	\$ 2,049.04	\$ 1,747.31	\$ 2,871.64	\$ 1,340.17	\$ 1,038.44	\$ 1,038.44	\$ 1,038.44
11 to 12*	\$ 237.14	\$ 634.10	\$ 237.14	\$ 2,028.27	\$ 1,696.38	\$ 2,820.71	\$ 1,319.40	\$ 987.51	\$ 987.51	\$ 987.51
12 to 13*	\$ 220.20	\$ 588.81	\$ 220.20	\$ 2,007.51	\$ 1,645.44	\$ 2,769.77	\$ 1,298.64	\$ 936.57	\$ 936.57	\$ 936.57
13 to 14	\$ 203.27	\$ 543.52	\$ 203.27	\$ 1,986.75	\$ 1,594.51	\$ 2,718.84	\$ 1,277.88	\$ 885.64	\$ 885.64	\$ 885.64
14 to 15	\$ 186.33	\$ 498.23	\$ 186.33	\$ 1,965.99	\$ 1,543.57	\$ 2,667.90	\$ 1,257.12	\$ 834.70	\$ 834.70	\$ 834.70
15 to 16	\$ 169.39	\$ 452.93	\$ 169.39	\$ 1,945.22	\$ 1,492.64	\$ 2,616.97	\$ 1,236.35	\$ 783.77	\$ 783.77	\$ 783.77
16 to 17	\$ 152.45	\$ 407.64	\$ 152.45	\$ 1,924.46	\$ 1,441.70	\$ 2,566.03	\$ 1,215.59	\$ 732.83	\$ 732.83	\$ 732.83
17 to 18	\$ 135.51	\$ 362.35	\$ 135.51	\$ 1,903.70	\$ 1,390.76	\$ 2,515.09	\$ 1,194.83	\$ 681.89	\$ 681.89	\$ 681.89
18 to 19	\$ 118.57	\$ 317.05	\$ 118.57	\$ 1,882.93	\$ 1,339.83	\$ 2,464.16	\$ 1,174.06	\$ 630.96	\$ 630.96	\$ 630.96
19 to 20	\$ 101.63	\$ 271.76	\$ 101.63	\$ 1,862.17	\$ 1,288.89	\$ 2,413.22	\$ 1,153.30	\$ 580.02	\$ 580.02	\$ 580.02
20 to 21	\$ 84.69	\$ 226.47	\$ 84.69	\$ 1,841.41	\$ 1,237.96	\$ 2,362.29	\$ 1,132.54	\$ 529.09	\$ 529.09	\$ 529.09
21 to 22	\$ 67.76	\$ 181.17	\$ 67.76	\$ 1,820.64	\$ 1,187.02	\$ 2,311.35	\$ 1,111.77	\$ 478.15	\$ 478.15	\$ 478.15
22 to 23	\$ 50.82	\$ 135.88	\$ 50.82	\$ 1,799.88	\$ 1,136.09	\$ 2,260.42	\$ 1,091.01	\$ 427.22	\$ 427.22	\$ 427.22
23 to 24	\$ 33.88	\$ 90.59	\$ 33.88	\$ 1,779.12	\$ 1,085.15	\$ 2,209.48	\$ 1,070.25	\$ 376.28	\$ 376.28	\$ 376.28
24 to 25	\$ 16.94	\$ 45.29	\$ 16.94	\$ 1,758.35	\$ 1,034.22	\$ 2,158.55	\$ 1,049.48	\$ 325.35	\$ 325.35	\$ 325.35
25 or more	\$ 0.00	\$ 0.00	\$ 0.00	\$ 1,737.59	\$ 983.28	\$ 2,107.61	\$ 1,028.72	\$ 274.41	\$ 274.41	\$ 274.41
<b>Service-Connected Disability Retirement</b>										
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:										
	\$ 211.73	\$ 566.16	\$ 211.73	\$ 1,997.13	\$ 1,619.97	\$ 2,744.30	\$ 1,288.26	\$ 911.10	\$ 911.10	\$ 911.10
<b>COBRA</b>										
	\$ 431.94	\$ 1,154.98	\$ 431.94	\$ 2,301.80	\$ 2,301.80	\$ 3,448.62	\$ 1,578.76	\$ 1,578.76	\$ 1,578.76	\$ 1,578.76

#### Rate Categories and Deduction Codes

- 443 — “Basic” over age 65 — Medicare-eligible who is classified as having renal failure (ESRD)
- 461 — “Basic” under age 65 — Medicare-eligible who is classified as having renal failure (ESRD)
- 462 — “Senior Advantage”

- 463 — Two family members are “Basic”
- 464 — Three or more family members are “Basic”
- 465 — One family member is “Senior Advantage”; one is “Basic”

#### Definitions

“Basic” includes participants who are under age 65.

“Senior Advantage” includes participants who are age 65 or older and who have assigned both Medicare Parts A and B to Kaiser Permanente.

## Tier 2

### Kaiser Permanente—Georgia

Rates Effective July 1, 2021

Years of Service	Retiree and Family	Retiree and Family - Retiree with Medicare	Retiree and Family - Dependent with Medicare	Retiree and Family - Retiree with Medicare	Retiree and Family - Dependent with Medicare	Retiree and Family - Retiree with Medicare	Retiree and Family - Dependent with Medicare	Retiree and Family - Retiree with Medicare	Retiree and Family - Dependent with Medicare
Deduction Code	(466)	(467)	(467)	(468)	(468)	(469)	(469)	(470)	(470)
Less than 10*	\$ 838.94	\$ 2,672.14	\$ 2,672.14	\$ 1,963.27	\$ 1,963.27	\$ 1,254.41	\$ 1,254.41	\$ 2,672.14	\$ 2,672.14
10 to 11*	\$ 631.31	\$ 2,464.51	\$ 2,162.78	\$ 1,755.64	\$ 1,453.91	\$ 1,046.78	\$ 752.65	\$ 2,464.51	\$ 2,162.78
11 to 12*	\$ 610.54	\$ 2,443.74	\$ 2,111.85	\$ 1,734.87	\$ 1,402.98	\$ 1,026.01	\$ 702.47	\$ 2,443.74	\$ 2,111.85
12 to 13*	\$ 589.78	\$ 2,422.98	\$ 2,060.91	\$ 1,714.11	\$ 1,352.04	\$ 1,005.25	\$ 652.29	\$ 2,422.98	\$ 2,060.91
13 to 14	\$ 569.02	\$ 2,402.22	\$ 2,009.98	\$ 1,693.35	\$ 1,301.11	\$ 984.49	\$ 602.12	\$ 2,402.22	\$ 2,009.98
14 to 15	\$ 548.26	\$ 2,381.46	\$ 1,959.04	\$ 1,672.59	\$ 1,250.17	\$ 963.73	\$ 551.94	\$ 2,381.46	\$ 1,959.04
15 to 16	\$ 527.49	\$ 2,360.69	\$ 1,908.11	\$ 1,651.82	\$ 1,199.24	\$ 942.96	\$ 501.76	\$ 2,360.69	\$ 1,908.11
16 to 17	\$ 506.73	\$ 2,339.93	\$ 1,857.17	\$ 1,631.06	\$ 1,148.30	\$ 922.20	\$ 451.59	\$ 2,339.93	\$ 1,857.17
17 to 18	\$ 485.97	\$ 2,319.17	\$ 1,806.23	\$ 1,610.30	\$ 1,097.36	\$ 901.44	\$ 401.41	\$ 2,319.17	\$ 1,806.23
18 to 19	\$ 465.20	\$ 2,298.40	\$ 1,755.30	\$ 1,589.53	\$ 1,046.43	\$ 880.67	\$ 351.23	\$ 2,298.40	\$ 1,755.30
19 to 20	\$ 444.44	\$ 2,277.64	\$ 1,704.36	\$ 1,568.77	\$ 995.49	\$ 859.91	\$ 301.06	\$ 2,277.64	\$ 1,704.36
20 to 21	\$ 423.68	\$ 2,256.88	\$ 1,653.43	\$ 1,548.01	\$ 944.56	\$ 839.15	\$ 250.88	\$ 2,256.88	\$ 1,653.43
21 to 22	\$ 402.91	\$ 2,236.11	\$ 1,602.49	\$ 1,527.24	\$ 893.62	\$ 818.38	\$ 200.71	\$ 2,236.11	\$ 1,602.49
22 to 23	\$ 382.15	\$ 2,215.35	\$ 1,551.56	\$ 1,506.48	\$ 842.69	\$ 797.62	\$ 150.53	\$ 2,215.35	\$ 1,551.56
23 to 24	\$ 361.39	\$ 2,194.59	\$ 1,500.62	\$ 1,485.72	\$ 791.75	\$ 776.86	\$ 100.35	\$ 2,194.59	\$ 1,500.62
24 to 25	\$ 340.62	\$ 2,173.82	\$ 1,449.69	\$ 1,464.95	\$ 740.82	\$ 756.09	\$ 50.18	\$ 2,173.82	\$ 1,449.69
25 or more	\$ 319.86	\$ 2,153.06	\$ 1,398.75	\$ 1,444.19	\$ 689.88	\$ 735.33	\$ 0.00	\$ 2,153.06	\$ 1,398.75

Service-Connected Disability Retirement									
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:									
	\$ 579.40	\$ 2,412.60	\$ 2,035.44	\$ 1,703.73	\$ 1,326.57	\$ 994.87	\$ 627.20	\$ 2,412.60	\$ 2,035.44

COBRA									
	\$ 855.72	\$ 2,725.58	\$ 2,725.58	\$ 2,002.54	\$ 2,002.54	\$ 1,279.50	\$ 1,279.50	\$ 2,725.58	\$ 2,725.58

#### Rate Categories and Deduction Codes

466 — Two family members are "Senior Advantage"  
 467 — One family member is "Senior Advantage"; two or more are "Basic"  
 468 — Two family members are "Senior Advantage"; one is "Basic"

469 — Three or more family members are "Senior Advantage"; one is "Basic"  
 470 — Three or more family members are "Basic"; one is "Senior Advantage"

#### Definitions

"Basic" includes participants who are under age 65.

"Senior Advantage" includes participants who are age 65 or older and who have assigned both Medicare Parts A and B to Kaiser Permanente.

## Tier 2

### Kaiser Permanente—Hawaii

Rates Effective July 1, 2021

## Tier 2

Years of Service	Retiree Only		Retiree and Dependent	Retiree and Family	Retiree and Family - Retiree with Medicare	Retiree and Family - Dependent with Medicare	Retiree and Family
Deduction Code	(471)	(472)	(474)	(475)	(476)	(476)	(478)
<b>Less than 10*</b>	\$ 941.61	\$ 468.76	\$ 1,875.23	\$ 2,808.84	\$ 1,402.37	\$ 1,402.37	\$ 929.52
10 to 11*	\$ 564.97	\$ 281.26	\$ 1,365.87	\$ 2,299.48	\$ 1,194.74	\$ 893.01	\$ 721.89
11 to 12*	\$ 527.30	\$ 262.51	\$ 1,314.94	\$ 2,248.55	\$ 1,173.97	\$ 842.08	\$ 701.12
12 to 13*	\$ 489.64	\$ 243.76	\$ 1,264.00	\$ 2,197.61	\$ 1,153.21	\$ 791.14	\$ 680.36
13 to 14	\$ 451.97	\$ 225.00	\$ 1,213.07	\$ 2,146.68	\$ 1,132.45	\$ 740.21	\$ 659.60
14 to 15	\$ 414.31	\$ 206.25	\$ 1,162.13	\$ 2,095.74	\$ 1,111.69	\$ 689.27	\$ 638.84
15 to 16	\$ 376.64	\$ 187.50	\$ 1,111.20	\$ 2,044.81	\$ 1,090.92	\$ 638.34	\$ 618.07
16 to 17	\$ 338.98	\$ 168.75	\$ 1,060.26	\$ 1,993.87	\$ 1,070.16	\$ 587.40	\$ 597.31
17 to 18	\$ 301.32	\$ 150.00	\$ 1,009.32	\$ 1,942.93	\$ 1,049.40	\$ 536.46	\$ 576.55
18 to 19	\$ 263.65	\$ 131.25	\$ 958.39	\$ 1,892.00	\$ 1,028.63	\$ 485.53	\$ 555.78
19 to 20	\$ 225.99	\$ 112.50	\$ 907.45	\$ 1,841.06	\$ 1,007.87	\$ 434.59	\$ 535.02
20 to 21	\$ 188.32	\$ 93.75	\$ 856.52	\$ 1,790.13	\$ 987.11	\$ 383.66	\$ 514.26
21 to 22	\$ 150.66	\$ 75.00	\$ 805.58	\$ 1,739.19	\$ 966.34	\$ 332.72	\$ 493.49
22 to 23	\$ 112.99	\$ 56.25	\$ 754.65	\$ 1,688.26	\$ 945.58	\$ 281.79	\$ 472.73
23 to 24	\$ 75.33	\$ 37.50	\$ 703.71	\$ 1,637.32	\$ 924.82	\$ 230.85	\$ 451.97
24 to 25	\$ 37.66	\$ 18.75	\$ 652.78	\$ 1,586.39	\$ 904.05	\$ 179.92	\$ 431.20
25 or more	\$ 0.00	\$ 0.00	\$ 601.84	\$ 1,535.45	\$ 883.29	\$ 128.98	\$ 410.44
<b>Service-Connected Disability Retirement</b>							
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:							
	\$ 470.80	\$ 234.38	\$ 1,238.53	\$ 2,172.14	\$ 1,142.83	\$ 765.67	\$ 669.98
<b>COBRA</b>							
	\$ 960.44	\$ 478.14	\$ 1,912.73	\$ 2,865.02	\$ 1,430.42	\$ 1,430.42	\$ 948.11

#### Rate Categories and Deduction Codes

471 — “Basic” under age 65  
 472 — “Senior Advantage”  
 474 — Two family members are “Basic”

475 — Three or more family members are “Basic”  
 476 — One family member is “Senior Advantage”; one is “Basic”  
 478 — Two family members are “Senior Advantage”

#### Definitions

“Basic” includes participants who are under age 65.

“Senior Advantage” includes participants who are age 65 or older and who have assigned both Medicare Parts A and B to Kaiser Permanente.

## Tier 2

### Kaiser Permanente—Oregon

Rates Effective July 1, 2021

## Tier 2

Years of Service	Retiree Only		Retiree and Family		Retiree and Family - Retiree with Medicare	Retiree and Family - Dependent with Medicare	Retiree and Family
	(481)	(482)	(484)	(485)	(486)	(486)	(488)
Deduction Code	(481)	(482)	(484)	(485)	(486)	(486)	(488)
<b>Less than 10*</b>	<b>\$ 1,154.66</b>	<b>\$ 479.36</b>	<b>\$ 2,301.32</b>	<b>\$ 3,447.98</b>	<b>\$ 1,626.02</b>	<b>\$ 1,626.02</b>	<b>\$ 950.72</b>
10 to 11*	\$ 692.80	\$ 287.62	\$ 1,791.96	\$ 2,938.62	\$ 1,418.39	\$ 1,116.66	\$ 743.09
11 to 12*	\$ 646.61	\$ 268.44	\$ 1,741.03	\$ 2,887.69	\$ 1,397.62	\$ 1,065.73	\$ 722.32
12 to 13*	\$ 600.42	\$ 249.27	\$ 1,690.09	\$ 2,836.75	\$ 1,376.86	\$ 1,014.79	\$ 701.56
13 to 14	\$ 554.24	\$ 230.09	\$ 1,639.16	\$ 2,785.82	\$ 1,356.10	\$ 963.86	\$ 680.80
14 to 15	\$ 508.05	\$ 210.92	\$ 1,588.22	\$ 2,734.88	\$ 1,335.34	\$ 912.92	\$ 660.04
15 to 16	\$ 461.86	\$ 191.74	\$ 1,537.29	\$ 2,683.95	\$ 1,314.57	\$ 861.99	\$ 639.27
16 to 17	\$ 415.68	\$ 172.57	\$ 1,486.35	\$ 2,633.01	\$ 1,293.81	\$ 811.05	\$ 618.51
17 to 18	\$ 369.49	\$ 153.40	\$ 1,435.41	\$ 2,582.07	\$ 1,273.05	\$ 760.11	\$ 597.75
18 to 19	\$ 323.30	\$ 134.22	\$ 1,384.48	\$ 2,531.14	\$ 1,252.28	\$ 709.18	\$ 576.98
19 to 20	\$ 277.12	\$ 115.05	\$ 1,333.54	\$ 2,480.20	\$ 1,231.52	\$ 658.24	\$ 556.22
20 to 21	\$ 230.93	\$ 95.87	\$ 1,282.61	\$ 2,429.27	\$ 1,210.76	\$ 607.31	\$ 535.46
21 to 22	\$ 184.75	\$ 76.70	\$ 1,231.67	\$ 2,378.33	\$ 1,189.99	\$ 556.37	\$ 514.69
22 to 23	\$ 138.56	\$ 57.52	\$ 1,180.74	\$ 2,327.40	\$ 1,169.23	\$ 505.44	\$ 493.93
23 to 24	\$ 92.37	\$ 38.35	\$ 1,129.80	\$ 2,276.46	\$ 1,148.47	\$ 454.50	\$ 473.17
24 to 25	\$ 46.19	\$ 19.17	\$ 1,078.87	\$ 2,225.53	\$ 1,127.70	\$ 403.57	\$ 452.40
25 or more	\$ 0.00	\$ 0.00	\$ 1,027.93	\$ 2,174.59	\$ 1,106.94	\$ 352.63	\$ 431.64
<b>Service-Connected Disability Retirement</b>							
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:							
	\$ 577.33	\$ 239.68	\$ 1,664.62	\$ 2,811.28	\$ 1,366.48	\$ 989.32	\$ 691.18
<b>COBRA</b>							
	\$ 1,177.75	\$ 488.95	\$ 2,347.35	\$ 3,516.94	\$ 1,658.54	\$ 1,658.54	\$ 969.73

#### Rate Categories and Deduction Codes

481 — “Basic” under age 65  
 482 — “Senior Advantage”  
 484 — Two family members are “Basic”  
 485 — Three or more family members are “Basic”

486 — One family member is “Senior Advantage”;  
 one is “Basic”  
 488 — Two family members are “Senior Advantage”

#### Definitions

“Basic” includes participants who are under age 65.

“Senior Advantage” includes participants who are age 65 or older and who have assigned both Medicare Parts A and B to Kaiser Permanente.

## Tier 2

### Kaiser Permanente—Oregon

Rates Effective July 1, 2021

Years of Service	Retiree and Family - Retiree with Medicare	Retiree and Family - Dependent with Medicare	Retiree and Family - Retiree with Medicare	Retiree and Family - Dependent with Medicare
Deduction Code	(493)	(493)	(494)	(494)
<b>Less than 10*</b>	<b>\$ 2,772.68</b>	<b>\$ 2,772.68</b>	<b>\$ 2,097.38</b>	<b>\$ 2,097.38</b>
10 to 11*	\$ 2,565.05	\$ 2,263.32	\$ 1,889.75	\$ 1,588.02
11 to 12*	\$ 2,544.28	\$ 2,212.39	\$ 1,868.98	\$ 1,537.09
12 to 13*	\$ 2,523.52	\$ 2,161.45	\$ 1,848.22	\$ 1,486.15
13 to 14	\$ 2,502.76	\$ 2,110.52	\$ 1,827.46	\$ 1,435.22
14 to 15	\$ 2,482.00	\$ 2,059.58	\$ 1,806.70	\$ 1,384.28
15 to 16	\$ 2,461.23	\$ 2,008.65	\$ 1,785.93	\$ 1,333.35
16 to 17	\$ 2,440.47	\$ 1,957.71	\$ 1,765.17	\$ 1,282.41
17 to 18	\$ 2,419.71	\$ 1,906.77	\$ 1,744.41	\$ 1,231.47
18 to 19	\$ 2,398.94	\$ 1,855.84	\$ 1,723.64	\$ 1,180.54
19 to 20	\$ 2,378.18	\$ 1,804.90	\$ 1,702.88	\$ 1,129.60
20 to 21	\$ 2,357.42	\$ 1,753.97	\$ 1,682.12	\$ 1,078.67
21 to 22	\$ 2,336.65	\$ 1,703.03	\$ 1,661.35	\$ 1,027.73
22 to 23	\$ 2,315.89	\$ 1,652.10	\$ 1,640.59	\$ 976.80
23 to 24	\$ 2,295.13	\$ 1,601.16	\$ 1,619.83	\$ 925.86
24 to 25	\$ 2,274.36	\$ 1,550.23	\$ 1,599.06	\$ 874.93
25 or more	\$ 2,253.60	\$ 1,499.29	\$ 1,578.30	\$ 823.99
<b>Service-Connected Disability Retirement</b>				
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:				
	\$ 2,513.14	\$ 2,135.98	\$ 1,837.84	\$ 1,460.68
<b>COBRA</b>				
	\$ 2,828.13	\$ 2,828.13	\$ 2,139.33	\$ 2,139.33

#### Rate Categories and Deduction Codes

493 — One family member is "Senior Advantage"; two or more are "Basic"  
 494 — Two family members are "Senior Advantage"; one is "Basic"

## Tier 2

### Kaiser Permanente—Washington

Rates Effective July 1, 2021

Years of Service	Retiree Only	Retiree Only	Retiree and Family	Retiree and Family	Retiree and Family - Retiree with Medicare	Retiree and Family - Dependent with Medicare
Deduction Code	(393)	(394)	(395)	(396)	(397)	(397)
<b>Less than 10*</b>	<b>\$ 1,242.34</b>	<b>\$ 435.70</b>	<b>\$ 2,313.00</b>	<b>\$ 3,867.64</b>	<b>\$ 1,506.36</b>	<b>\$ 1,506.36</b>
10 to 11*	\$ 745.40	\$ 261.42	\$ 1,803.64	\$ 3,358.28	\$ 1,298.73	\$ 997.00
11 to 12*	\$ 695.71	\$ 243.99	\$ 1,752.71	\$ 3,307.35	\$ 1,277.96	\$ 946.07
12 to 13*	\$ 646.02	\$ 226.56	\$ 1,701.77	\$ 3,256.41	\$ 1,257.20	\$ 895.13
13 to 14	\$ 596.32	\$ 209.14	\$ 1,650.84	\$ 3,205.48	\$ 1,236.44	\$ 844.20
14 to 15	\$ 546.63	\$ 191.71	\$ 1,599.90	\$ 3,154.54	\$ 1,215.68	\$ 793.26
15 to 16	\$ 496.94	\$ 174.28	\$ 1,548.97	\$ 3,103.61	\$ 1,194.91	\$ 742.33
16 to 17	\$ 447.24	\$ 156.85	\$ 1,498.03	\$ 3,052.67	\$ 1,174.15	\$ 691.39
17 to 18	\$ 397.55	\$ 139.42	\$ 1,447.09	\$ 3,001.73	\$ 1,153.39	\$ 640.45
18 to 19	\$ 347.86	\$ 122.00	\$ 1,396.16	\$ 2,950.80	\$ 1,132.62	\$ 589.52
19 to 20	\$ 298.16	\$ 104.57	\$ 1,345.22	\$ 2,899.86	\$ 1,111.86	\$ 538.58
20 to 21	\$ 248.47	\$ 87.14	\$ 1,294.29	\$ 2,848.93	\$ 1,091.10	\$ 487.65
21 to 22	\$ 198.77	\$ 69.71	\$ 1,243.35	\$ 2,797.99	\$ 1,070.33	\$ 436.71
22 to 23	\$ 149.08	\$ 52.28	\$ 1,192.42	\$ 2,747.06	\$ 1,049.57	\$ 385.78
23 to 24	\$ 99.39	\$ 34.86	\$ 1,141.48	\$ 2,696.12	\$ 1,028.81	\$ 334.84
24 to 25	\$ 49.69	\$ 17.43	\$ 1,090.55	\$ 2,645.19	\$ 1,008.04	\$ 283.91
25 or more	\$ 0.00	\$ 0.00	\$ 1,039.61	\$ 2,594.25	\$ 987.28	\$ 232.97
<b>Service-Connected Disability Retirement</b>						
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:						
	\$ 621.17	\$ 217.85	\$ 1,676.30	\$ 3,230.94	\$ 1,246.82	\$ 869.66
<b>COBRA</b>						
	\$ 1,267.19	\$ 444.41	\$ 2,359.26	\$ 3,944.99	\$ 1,536.49	\$ 1,536.49

#### Rate Categories and Deduction Codes

393 — "Basic" under age 65  
 394 — "Senior Advantage"  
 395 — Two family members are "Basic"  
 396 — Three or more family members are "Basic"  
 397 — One family member is "Senior Advantage"; one is "Basic"



## Tier 2

### Kaiser Permanente—Washington

Rates Effective July 1, 2021

Years of Service	Retiree and Family	Retiree and Family - Retiree with Medicare	Retiree and Family - Dependent with Medicare	Retiree and Family - Retiree with Medicare	Retiree and Family - Dependent with Medicare
Deduction Code	(398)	(399)	(399)	(400)	(400)
<b>Less than 10*</b>	<b>\$ 863.40</b>	<b>\$ 3,061.00</b>	<b>\$ 3,061.00</b>	<b>\$ 2,418.04</b>	<b>\$ 2,418.04</b>
10 to 11*	\$ 655.77	\$ 2,853.37	\$ 2,551.64	\$ 2,210.41	\$ 1,908.68
11 to 12*	\$ 635.00	\$ 2,832.60	\$ 2,500.71	\$ 2,189.64	\$ 1,857.75
12 to 13*	\$ 614.24	\$ 2,811.84	\$ 2,449.77	\$ 2,168.88	\$ 1,806.81
13 to 14	\$ 593.48	\$ 2,791.08	\$ 2,398.84	\$ 2,148.12	\$ 1,755.88
14 to 15	\$ 572.72	\$ 2,770.32	\$ 2,347.90	\$ 2,127.36	\$ 1,704.94
15 to 16	\$ 551.95	\$ 2,749.55	\$ 2,296.97	\$ 2,106.59	\$ 1,654.01
16 to 17	\$ 531.19	\$ 2,728.79	\$ 2,246.03	\$ 2,085.83	\$ 1,603.07
17 to 18	\$ 510.43	\$ 2,708.03	\$ 2,195.09	\$ 2,065.07	\$ 1,552.13
18 to 19	\$ 489.66	\$ 2,687.26	\$ 2,144.16	\$ 2,044.30	\$ 1,501.20
19 to 20	\$ 468.90	\$ 2,666.50	\$ 2,093.22	\$ 2,023.54	\$ 1,450.26
20 to 21	\$ 448.14	\$ 2,645.74	\$ 2,042.29	\$ 2,002.78	\$ 1,399.33
21 to 22	\$ 427.37	\$ 2,624.97	\$ 1,991.35	\$ 1,982.01	\$ 1,348.39
22 to 23	\$ 406.61	\$ 2,604.21	\$ 1,940.42	\$ 1,961.25	\$ 1,297.46
23 to 24	\$ 385.85	\$ 2,583.45	\$ 1,889.48	\$ 1,940.49	\$ 1,246.52
24 to 25	\$ 365.08	\$ 2,562.68	\$ 1,838.55	\$ 1,919.72	\$ 1,195.59
25 or more	\$ 344.32	\$ 2,541.92	\$ 1,787.61	\$ 1,898.96	\$ 1,144.65
<b>Service-Connected Disability Retirement</b>					
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:					
	\$ 603.86	\$ 2,801.46	\$ 2,424.30	\$ 2,158.50	\$ 1,781.34
<b>COBRA</b>					
	\$ 880.67	\$ 3,122.22	\$ 3,122.22	\$ 2,466.40	\$ 2,466.40

#### Rate Categories and Deduction Codes

- 398 — Two family members are "Senior Advantage"
- 399 — One family member is "Senior Advantage"; two or more are "Basic"
- 400 — Two family members are "Senior Advantage"; one or more is "Basic"

## Tier 2

### Cigna Preferred with Rx—Phoenix, AZ

Rates Effective July 1, 2021

Years of Service	Retiree Only with Medicare	Retiree and Spouse/ Domestic Partner — 1 with Medicare	Retiree and Spouse/ Domestic Partner — Both with Medicare	Retiree and Children	Retiree, Spouse/ Domestic Partner and Children — 1 with Medicare	Retiree, Spouse/ Domestic Partner, and Children — 2 with Medicare
Deduction Code	(321)	(322)	(324)	(325)	(327)	(329)
<b>Less than 10*</b>	<b>\$ 384.49</b>	<b>\$ 1,717.78</b>	<b>\$ 760.98</b>	<b>\$ 926.28</b>	<b>\$ 2,258.85</b>	<b>\$ 1,342.91</b>
10 to 11*	\$ 230.69	\$ 1,510.15	\$ 553.35	\$ 718.65	\$ 2,051.22	\$ 1,135.28
11 to 12*	\$ 215.31	\$ 1,489.38	\$ 532.58	\$ 697.88	\$ 2,030.45	\$ 1,114.51
12 to 13*	\$ 199.93	\$ 1,468.62	\$ 511.82	\$ 677.12	\$ 2,009.69	\$ 1,093.75
13 to 14	\$ 184.56	\$ 1,447.86	\$ 491.06	\$ 656.36	\$ 1,988.93	\$ 1,072.99
14 to 15	\$ 169.18	\$ 1,427.10	\$ 470.30	\$ 635.60	\$ 1,968.17	\$ 1,052.23
15 to 16	\$ 153.80	\$ 1,406.33	\$ 449.53	\$ 614.83	\$ 1,947.40	\$ 1,031.46
16 to 17	\$ 138.42	\$ 1,385.57	\$ 428.77	\$ 594.07	\$ 1,926.64	\$ 1,010.70
17 to 18	\$ 123.04	\$ 1,364.81	\$ 408.01	\$ 573.31	\$ 1,905.88	\$ 989.94
18 to 19	\$ 107.66	\$ 1,344.04	\$ 387.24	\$ 552.54	\$ 1,885.11	\$ 969.17
19 to 20	\$ 92.28	\$ 1,323.28	\$ 366.48	\$ 531.78	\$ 1,864.35	\$ 948.41
20 to 21	\$ 76.90	\$ 1,302.52	\$ 345.72	\$ 511.02	\$ 1,843.59	\$ 927.65
21 to 22	\$ 61.52	\$ 1,281.75	\$ 324.95	\$ 490.25	\$ 1,822.82	\$ 906.88
22 to 23	\$ 46.14	\$ 1,260.99	\$ 304.19	\$ 469.49	\$ 1,802.06	\$ 886.12
23 to 24	\$ 30.76	\$ 1,240.23	\$ 283.43	\$ 448.73	\$ 1,781.30	\$ 865.36
24 to 25	\$ 15.38	\$ 1,219.46	\$ 262.66	\$ 427.96	\$ 1,760.53	\$ 844.59
25 or more	\$ 0.00	\$ 1,198.70	\$ 241.90	\$ 407.20	\$ 1,739.77	\$ 823.83
<b>Service-Connected Disability Retirement</b>						
*If you are on a service-connected disability retirement with less than 13 years of service, you pay:						
	\$ 192.24	\$ 1,458.24	\$ 501.44	\$ 666.74	\$ 1,999.31	\$ 1,083.37
<b>COBRA</b>						
	\$ 392.18	\$ 1,752.14	\$ 776.20	\$ 944.81	\$ 2,304.03	\$ 1,369.77

# L//CERA



# NOTICE OF CREDITABLE COVERAGE

## Important Notice for Non-Medicare Eligible Retirees from LACERA About Your Prescription Drug Coverage and Medicare

Please read this notice carefully and keep it where you can find it. This notice has information about your current prescription drug coverage through your LACERA-administered medical group plan and about your options under Medicare's prescription drug coverage. This information can help you decide whether or not you want to join a Medicare drug plan. If you are considering joining, you should compare your current coverage, including which drugs are covered at what cost, with the coverage and costs of the plans offering Medicare prescription drug coverage in your area. Information about where you can get help to make decisions about your prescription drug coverage is at the end of this notice.

There are two important things you need to know about your current coverage and Medicare's prescription drug coverage:

1. Medicare prescription drug coverage became available in 2006 to everyone with Medicare. You can get this coverage if you join a Medicare Prescription Drug Plan or join a Medicare Advantage Plan (like Kaiser Permanente Senior Advantage HMO) or a Medicare Supplemental Plan (like Anthem Blue Cross Plan III) that offers prescription drug coverage. All Medicare drug plans provide at least a standard level of coverage set by Medicare. Some plans may also offer more coverage for a higher monthly premium.
2. LACERA has determined that the prescription drug coverage offered by the LACERA-administered medical plans (Anthem Blue Cross Prudent Buyer, Plan I, and Plan II; Cigna HMO; Kaiser Permanente HMO; and UnitedHealthcare HMO) are, on average for all plan participants, expected to pay out as much as standard Medicare prescription drug coverage pays and is therefore considered creditable coverage. Because your existing coverage is creditable coverage, you can keep this coverage and not pay a higher premium (a penalty) if you later decide to join a Medicare drug plan.

**Medicare Eligible Retirees and Dependents:**  
This Notice does not apply to you, as you are already enrolled in a Medicare Part D Plan through LACERA.



## When Can You Join a Medicare Drug Plan?

You can join a Medicare drug plan when you first become eligible for Medicare and each year from October 15th to December 7th.

However, if you lose your current creditable prescription drug coverage, through no fault of your own, you will also be eligible for a two (2) month Special Enrollment Period (SEP) to join a Medicare drug plan.

## What Happens to Your Current Coverage if You Decide to Join a Non-LACERA Medicare Drug Plan?

Upon becoming entitled to Medicare, if you sign up for a Non-LACERA Medicare Advantage Prescription Drug plan, you will no longer be eligible for Kaiser Permanente HMO, UnitedHealthcare HMO, or Cigna HMO coverage through LACERA. If you decide to join a Medicare drug plan, your LACERA-administered plan coverage for Medicare-eligible individuals may be affected. You and your dependents may no longer be eligible for LACERA's Medicare Advantage Prescription Drug HMOs (Kaiser Permanente Senior Advantage, Cigna Preferred with Rx (available in Maricopa County and Apache Junction, Pinal County, Arizona only), UnitedHealthcare Medicare Advantage, and SCAN Health Plan), and you will be disenrolled from medical and prescription drug coverage offered through LACERA. You and your eligible dependents will continue to be eligible for benefits under Anthem Blue Cross Plans I, II, III and Prudent Buyer. However, your LACERA coverage will pay secondary to Medicare.

Before you decide to enroll in a non-LACERA Medicare prescription drug plan, you should compare your LACERA plan options — including which drugs are covered — with the coverage and cost of the Medicare drug plans available in your area. **Please call LACERA at (800) 786-6464 and press 1 or (626) 564-6132 prior to enrolling if you have any questions.**

If you do decide to join a Medicare drug plan and drop your current LACERA-administered medical coverage, be aware that you and your dependents will be able to get this coverage back; however, you will need to go through the waiting period for changing coverage.

## When Will You Pay a Higher Premium (Penalty) to Join a Medicare Drug Plan?

You should also know that if you drop or lose your current coverage with LACERA and don't join a Medicare drug plan within 63 continuous days after your current coverage ends, you may pay a higher premium (a penalty) to join a Medicare drug plan later.

If you go 63 continuous days or longer without creditable prescription drug coverage, your monthly premium may go up by at least 1% of the Medicare base beneficiary premium per month for every month that you did not have that coverage. For example, if you go nineteen months without creditable coverage, your premium may consistently be at least 19% higher than the Medicare base beneficiary premium. You may have to pay

this higher premium (a penalty) as long as you have Medicare prescription drug coverage. In addition, you may have to wait until the following October to join.

**Note:** You'll get this notice each year. You will also get it before the next period you can join a Medicare drug plan, and if this coverage through LACERA changes. You also may request a copy of this notice at any time or you may download it from [www.lacera.com](http://www.lacera.com).

### For More Information About Your Options Under Medicare Prescription Drug Coverage

More detailed information about Medicare plans that offer prescription drug coverage is in the "Medicare & You" handbook. You'll get a copy of the handbook in the mail every year from Medicare. You may also be contacted directly by Medicare drug plans.

### For More Information About Medicare Prescription Drug Coverage

- Visit [www.medicare.gov](http://www.medicare.gov).
- Call your State Health Insurance Assistance Program (see the inside back cover of your copy of the "Medicare & You" handbook for their telephone number) for personalized help.
- Call (800) MEDICARE or (800) 633-4227. TTY users should call (877) 486-2048.

If you have limited income and resources, extra help paying for Medicare prescription drug coverage is available. For information about this extra help:

- Visit Social Security on the web at [www.socialsecurity.gov](http://www.socialsecurity.gov) or call Social Security at (800) 772-1213. TTY users should call (800) 325-0778.

**Remember: Keep this creditable coverage notice. If you decide to join one of the Medicare drug plans, you may be required to provide a copy of this notice when you join to show whether or not you have maintained creditable coverage and, therefore, whether or not you are required to pay a higher premium (a penalty).**

**Date:** June 2021

**Name of Entity/Sender:** LACERA

**Address:** Retiree Healthcare Division  
P.O. Box 7060  
Pasadena, CA 91109-7060

**Phone Number:** (800) 786-6464 and press 1

**Access My LACERA:** Go to the [lacera.com](http://lacera.com) homepage. Click on the My LACERA logo at the bottom of the page and "Sign-in" or "Sign-up."

**Website:** [www.lacera.com](http://www.lacera.com)



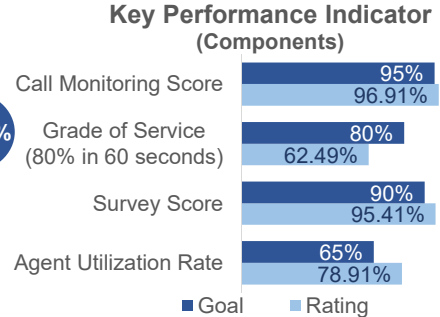
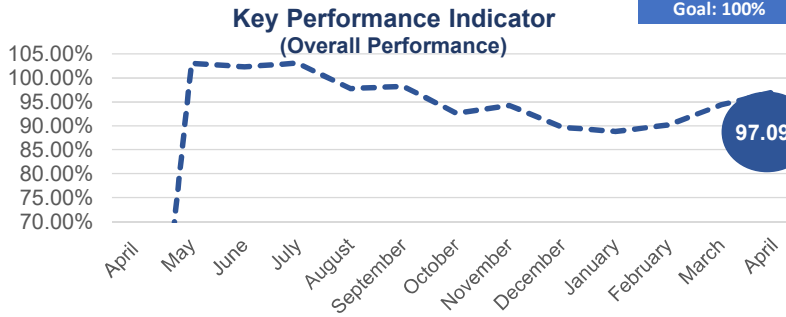
**L//CERA**

# Striving for Excellence in Service

Service Metrics Reported on a Fiscal Year Basis (July 1) Through: April 2021

<p><b>Outreach Attendance</b> <b>1,506</b> 16,139 Year-to-Date</p>	<p><b>Outreach Events</b> <b>39</b> 210 Year-to-Date</p>	<p><b>Outreach Satisfaction</b> <b>N/A</b> Change Since Last Mo</p>	<p><b>Member Service Center</b> <b>N/A</b> - Change Since Last Mo</p>	<p><b>Member Services Calls</b> <b>14,587</b> 15,964 3 Mo. Avg.</p>
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## Member Services



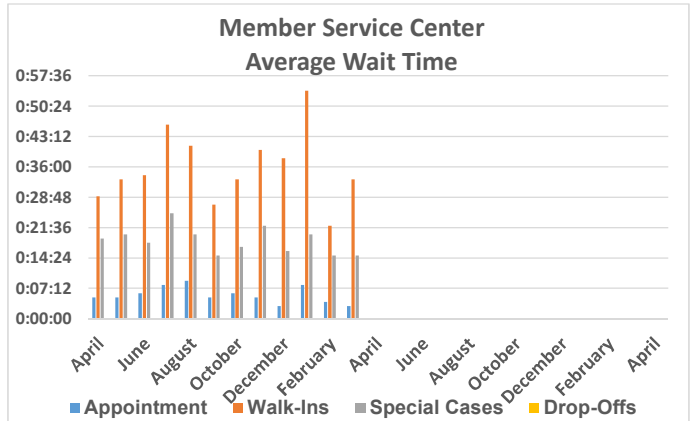
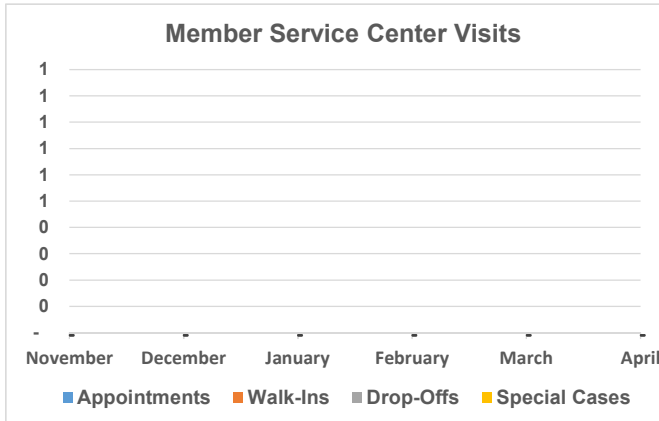
### Top Calls

1. MyLACERA Portal Login Issues
2. Retirement Counseling: Process Overview
3. Retirement Counseling: Estimate

**Emails 748**  
24:00 hours  
Avg. Response Time (ART)



**Secure Messages 756**



\*Drop Off Wait Time: No Waiting



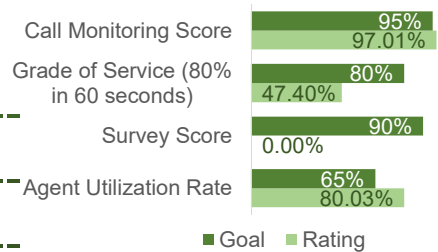
## Retiree Healthcare

Total RHC Calls: 7,867



### Top Calls

1. Medical/Dental Enrollments
2. Medical Benefits
3. Medicare Part B Reimbursements



**Emails 517**  
10 Days  
Avg. Response Time (ART)



**Secure Messages 348**

## Striving for Excellence in Service (Continued)

Disability

### Applications

**717**

**In Process As Of:**  
4/30/2021

729 Pending on: 3/31/2021  
60 Received  
580 Year-to-Date  
0 Re-Opened  
0 Year-to-Date  
63 To Board - Initial  
452 Year-to-Date  
9 Closed  
54 Year-to-Date

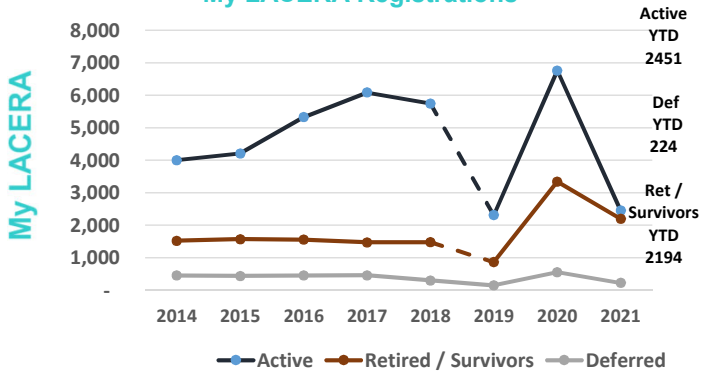
### Appeals

**94**

**In Process As Of:**  
4/30/2021

92 Pending on: 3/31/2021  
2 Received  
12 Year-to-Date  
0 Admin Closed/Rule 32  
9 Year-to-Date  
0 Referee Recommended  
7 Year-to-Date  
0 Revised/Reconsidered for Granting  
1 Year-to-Date

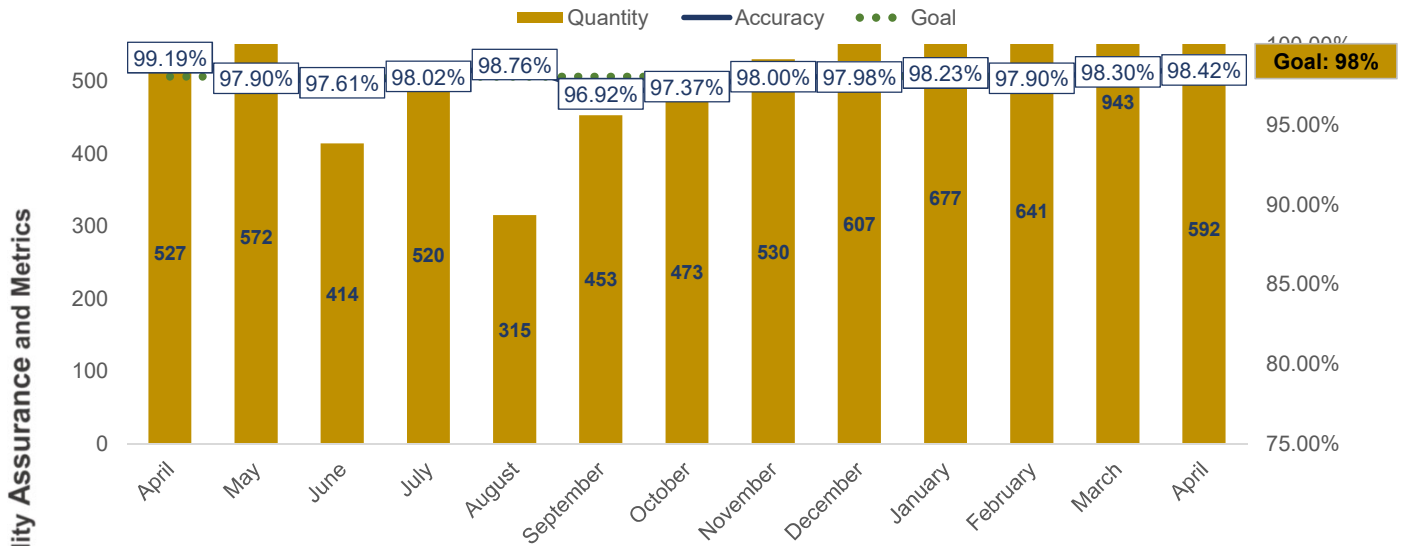
### My LACERA Registrations



**COVID-19 NOTE**  
Some Member Services, Retiree Healthcare, and Quality Assurance statistics became unavailable for a short time beginning in April 2020 due to COVID-19 impacts. Most of the data contained herein is up to date and based on current production both virtually and in the office. However, some data points such as surveys are based on six month average for survey scores prior to the pandemic.

## Striving for Excellence in Quality

### Audits of Retirement Elections, Payment Contracts, and Data Entry Completed by QA



\*Data for April 2020 is incomplete due to COVID-19 challenges. This is an estimated accuracy %

**April 2021**

**98.42%**



#### Retirement Elections

**251** Samples  
**98.26%** Accuracy

#### Payment Contracts

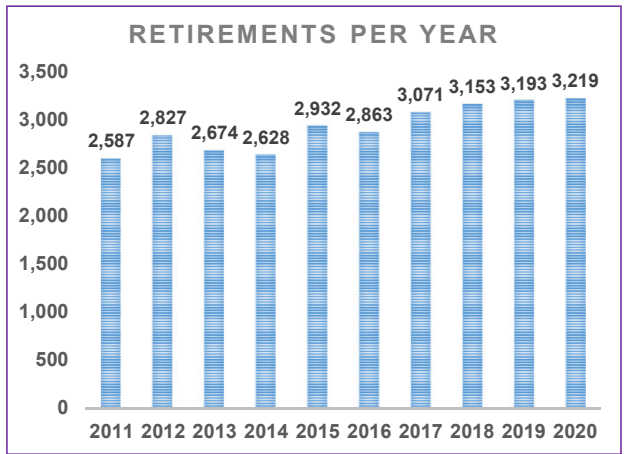
**251** Samples  
**97.37%** Accuracy

#### Data Entry

**90** Samples  
**99.63%** Accuracy

## Member Snapshot

	Members as of 05/14/2021				
	Plan	Active	Retired	Survivors	Total
General	Plan A	72	15,000	4,270	19,342
	Plan B	19	663	69	751
	Plan C	24	426	64	514
	Plan D	38,376	18,120	1,670	58,166
	Plan E	15,422	14,120	1,379	30,921
	Plan G	32,111	96	9	32,216
	<b>Total General</b>	<b>86,024</b>	<b>48,425</b>	<b>7,461</b>	<b>141,910</b>
Safety	Plan A	2	4,855	1,618	6,475
	Plan B	8,716	6,886	343	15,945
	Plan C	4,438	14	1	4,453
	<b>Total Safety</b>	<b>13,156</b>	<b>11,755</b>	<b>1,962</b>	<b>26,873</b>
<b>TOTAL MEMBERS</b>		<b>99,180</b>	<b>60,180</b>	<b>9,423</b>	<b>168,783</b>
<b>% by Category</b>		<b>59%</b>	<b>36%</b>	<b>6%</b>	<b>100%</b>



### Average Monthly Benefit Allowance Distribution May 2021

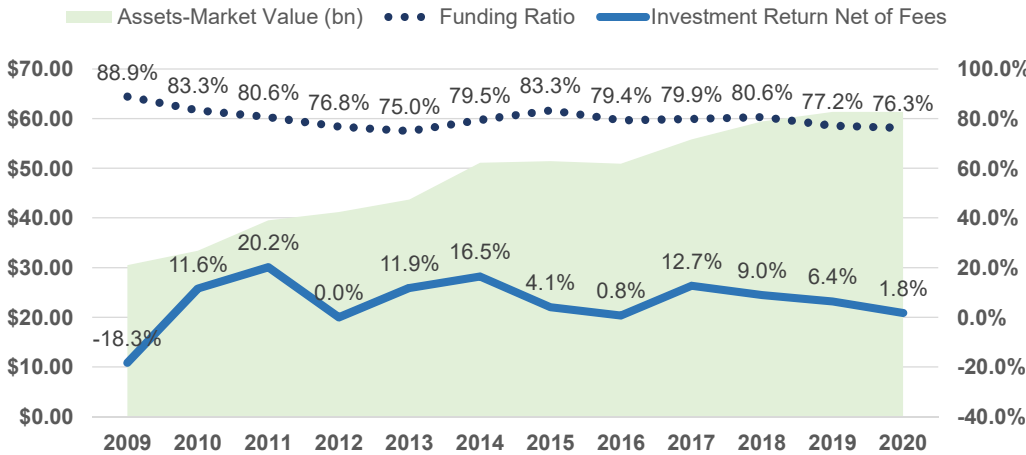
	General	Safety	Total	%
\$0 to \$3,999	29,714	1,698	31,412	52.49%
\$4,000 to \$7,999	13,344	3,469	16,813	28.10%
\$8,000 to \$11,999	3,644	4,258	7,902	13.20%
\$12,000 to \$15,999	997	1,764	2,761	4.61%
\$16,000 to \$19,999	329	344	673	1.12%
\$20,000 to \$23,999	100	111	211	0.35%
\$24,000 to \$27,999	24	26	50	0.08%
> \$28,000	18	3	21	0.04%
<b>Totals</b>	<b>48,170</b>	<b>11,673</b>	<b>59,843</b>	<b>100%</b>

**Average Monthly Benefit Allowance: \$ 4,585.00**

Healthcare Program		Healthcare Enrollments	
(Mo. Ending: 04/30/2021)		(Mo. Ending: 04/30/2021)	
	Employer	Member	
Medical	472.6	36.8	Medical 52,262
Dental	37.9	3.7	Dental 53,715
Part B	62.5	0	Part B 35,858
			LTC 585
<b>Total</b>	<b>573.0</b>	<b>40.5</b>	<b>Total 142,420</b>

## Key Financial Metrics

### Fiscal Year End Financial Update (as of 06/30/2020)



### Funding Metrics (as of 6/30/20)

Employer NC	10.89%
UAAL	14.85%
Assumed Rate	7.00%
Star Reserve	\$614m
Total Assets	\$58.5b

### Contributions (as of 6/30/20)

	Employer	Member
Annual Add	\$1.8b	\$659.3m
% of Payroll	24.64%	7.80%

### TOTAL FUND RETURN (Net of Fees)

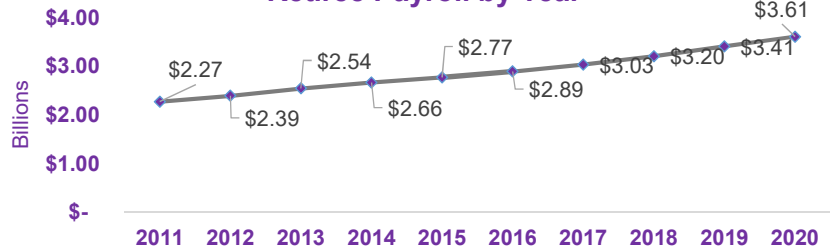
**5 YR: 6.1%    10 YR: 8.2%**

### Retired Members Payroll

(As of 04/30/2021)

Monthly Payroll	\$331.31m
Payroll YTD	\$3.2b
New Retired Payees Added	1,021
Seamless %	98.24%
New Seamless Payees Added	4,111
Seamless YTD	97.18%
By Check %	3.00%
By Direct Deposit %	97.00%

### Retiree Payroll by Year



Date	Conference
<b>June, 2021</b>	
14-18	Investment Strategies & Portfolio Management ( <i>prev. Pension Fund &amp; Investment Mgmt.</i> ) Wharton School, University of Pennsylvania LIVE Virtual
22-24	AHIP (America's Health Insurance Plans) Institute Virtual
25	CALAPRS (California Association of Public Retirement Systems) Round Table – Benefits Virtual
27-30	Government Finance Officers Association (GFOA) Annual Conference Chicago, IL <b>LIVE EVENT CANCELLED &amp; MOVED TO VIRTUAL IN JULY</b>
28-30	National Association of Securities Professionals (NASPc) 32 <sup>nd</sup> Annual Pension & Financial Services Conference Philadelphia, PA <b>LIVE EVENT CANCELLED &amp; MOVED TO VIRTUAL IN SEPTEMBER</b>
28-30	IFEBP (International Foundation of Employment Benefit Plans) Public Employee Benefits Institute San Diego, CA <b>CANCELLED</b>
<b>July, 2021</b>	
12-23	Government Finance Officers Association (GFOA) Annual Conference 2021 Virtual Conference
13-15	Pacific Pension Institute (PPI) North American Summer Roundtable Virtual
<b>August, 2021</b>	
22-24	NCPERS (National Conference on Public Employee Retirement Systems) Public Pension Funding Forum New York, NY
<b>September, 2021</b>	
17	CALAPRS (California Association of Public Retirement Systems) Round Table – Benefits Virtual ( <i>subject to change in venue</i> )
22-24	National Association of Securities Professionals (NASP) 32 <sup>nd</sup> Annual Pension & Financial Services Conference Virtual
22-24	Council of Institutional Investors (CII) Fall Conference Virtual/Limited In-Person Attendance
26-28	NCPERS (National Conference on Public Employee Retirement Systems) FALL (Financial, Actuarial, Legislative & Legal) Conference Scottsdale, AZ





May 25, 2021

**TO:** Trustees, Board of Retirement

**FOR:** Board of Retirement Meeting on June 2, 2020

**SUBJECT:** Ratification of Service Retirement and Survivor Benefit Application Approvals

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The attached report reflects service retirements and survivor benefit applications received as of the date of this memo, along with any retirement rescissions and/or changes approved at last month's Board meeting. Any retirement rescissions or changes received after the date of this memo up to the date of the Board's approval, will be reflected in next month's report.

# BOARD OF RETIREMENT MEETING OF JUNE 2, 2021

## BENEFIT APPROVAL LIST

### SAFETY MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
JAY P. COLVIN	L A COUNTY FIRE DEPT Dept.#FR	06-30-2021	27 YRS 05 MOS
THANH FLUMERFELT	DISTRICT ATTORNEY Dept.#DA	06-26-2021	24 YRS 02 MOS
THOMAS E. FRIEBURG	L A COUNTY FIRE DEPT Dept.#FR	06-16-2021	17 YRS 00 MOS
RAYMOND LAM	SHERIFF Dept.#SH	05-30-2021	32 YRS 01 MOS
MARK J. LANDRUM	SHERIFF Dept.#SH	06-30-2021	27 YRS 05 MOS
CARLOS A. MARQUEZ	SHERIFF Dept.#SH	06-30-2021	33 YRS 03 MOS
DOUGLAS A. MC CULLOUGH	SHERIFF Dept.#SH	06-30-2021	34 YRS 06 MOS
BRIAN L. MITCHELL	SHERIFF Dept.#SH	05-05-2021	31 YRS 09½ MOS
PATRICK A. NELSON	SHERIFF Dept.#SH	05-29-2021	37 YRS 08 MOS

# BOARD OF RETIREMENT MEETING OF JUNE 2, 2021

## BENEFIT APPROVAL LIST

### SAFETY MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
VERONICA A. RUFFIN	SHERIFF Dept.#SH	06-30-2021	25 YRS 00 MOS
RANDALL S. SMITH	L A COUNTY FIRE DEPT Dept.#FR	06-30-2021	26 YRS 06 MOS
JAMES A. SWAN	SHERIFF Dept.#SH	06-30-2021	20 YRS 03 MOS
JOYCE I. TOBE-KERSHIS	DISTRICT ATTORNEY Dept.#DA	06-30-2021	25 YRS 01 MOS
PATRICK S. WALSH	L A COUNTY FIRE DEPT Dept.#FR	06-28-2021	32 YRS 06 MOS

# BOARD OF RETIREMENT MEETING OF JUNE 2, 2021

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
MARIA ACOSTA	CHILD SUPPORT SERVICES Dept.#CD	06-26-2021	27 YRS 02 MOS
AGUL P. AKOPYAN	PUBLIC HEALTH PROGRAM Dept.#PH	05-28-2021	12 YRS 07 MOS
CAROLYN ALEXANDER	PROBATION DEPARTMENT Dept.#PB	07-30-2021	17 YRS 03 MOS
EDWARD R. ARIAS	SUPERIOR COURT/COUNTY CLERK Dept.#SC	07-31-2021	35 YRS 05½ MOS
KIM L. BILBREW	CHILDREN & FAMILY SERVICES Dept.#CH	04-30-2021	15 YRS 02 MOS
DIANA M. BOTEZAN	CORRECTIONAL HEALTH Dept.#HC	05-09-2021	15 YRS 08½ MOS
EILEEN T. CABUS	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	05-29-2021	33 YRS 11 MOS
DARIN A. CALCUTTA	REG-RECORDER/COUNTY CLERK Dept.#RR	05-29-2021	25 YRS 06 MOS
LINDA M. CANDELARIA	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-30-2021	22 YRS 08 MOS

# BOARD OF RETIREMENT MEETING OF JUNE 2, 2021

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
JAMIE L. CANTOR	CHILDREN & FAMILY SERVICES Dept.#CH	05-29-2021	30 YRS 11 MOS
IRVIN A. CASTILLE	PROBATION DEPARTMENT Dept.#PB	05-31-2021	34 YRS 09½ MOS
ALAN K. CHANG	INTERNAL SERVICES Dept.#IS	06-30-2021	32 YRS 11 MOS
ALEKSEY CHETVERUKHIN	MENTAL HEALTH Dept.#MH	06-25-2021	20 YRS 03 MOS
PHOURY CHHUN	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	04-30-2021	27 YRS 08 MOS
ROSA COLORADO	CHILDREN & FAMILY SERVICES Dept.#CH	06-01-2021	33 YRS 02½ MOS
VENTURA E. CUENCA	ASSESSOR Dept.#AS	05-28-2021	41 YRS 00 MOS
EDEN A. DALIVA	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.#HO	05-30-2021	25 YRS 00 MOS
PAUL F. ESTOPIER	PUBLIC DEFENDER Dept.#PD	05-29-2021	31 YRS 09 MOS

# BOARD OF RETIREMENT MEETING OF JUNE 2, 2021

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
GHOLAM R. FATAHI	INTERNAL SERVICES Dept.#IS	04-30-2021	27 YRS 03½ MOS
THOMAS M. FLORES	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	04-30-2021	46 YRS 02 MOS
WENDY G. FLORES	SHERIFF Dept.#SH	04-30-2021	20 YRS 01 MOS
YOLANDA Y. FRANK	PUBLIC HEALTH PROGRAM Dept.#PH	05-28-2021	38 YRS 09 MOS
CARMEN GALLARDO	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-26-2021	26 YRS 02 MOS
CAROL M. GARCIA	CHILD SUPPORT SERVICES Dept.#CD	05-01-2021	47 YRS 04½ MOS
CYNTHIA S. GAUHAN	MENTAL HEALTH Dept.#MH	04-30-2021	11 YRS 05½ MOS
CHRISTINA M. GUERRERO	PROBATION DEPARTMENT Dept.#PB	05-29-2021	21 YRS 09 MOS
LOURDES GUERRERO	CHIEF EXECUTIVE OFFICE Dept.#AO	06-30-2021	30 YRS 01 MOS

# BOARD OF RETIREMENT MEETING OF JUNE 2, 2021

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
BRIAN K. HAMILTON	SUPERIOR COURT/COUNTY CLERK Dept.#SC	06-08-2021	33 YRS 11½ MOS
TRACY L. HARRIS	ASSESSOR Dept.#AS	06-30-2021	40 YRS 04 MOS
BESSIE L. HWANG	PUBLIC HEALTH PROGRAM Dept.#PH	06-30-2021	25 YRS 01 MOS
ARLENE M. IGNACIO	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	05-08-2021	37 YRS 05 MOS
CHERIE Y. INGRAM	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	06-26-2021	21 YRS 04 MOS
JEAN Y. JONES	TREASURER AND TAX COLLECTOR Dept.#TT	06-26-2021	12 YRS 00 MOS
YOUNG KIM	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	05-31-2021	14 YRS 08½ MOS
ANGELA K. KIM	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	05-28-2021	31 YRS 00 MOS
YING H. KING	ASSESSOR Dept.#AS	06-30-2021	36 YRS 08 MOS



# BOARD OF RETIREMENT MEETING OF JUNE 2, 2021

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
CHIH C. LIN	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	05-15-2021	14 YRS 03½ MOS
REBECA LOPEZ-LEIVA	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-26-2021	22 YRS 09 MOS
JOHN B. LOVE	INTERNAL SERVICES Dept.#IS	06-30-2021	23 YRS 00 MOS
JAMES D. LOWE	PUBLIC DEFENDER Dept.#PD	07-01-2021	10 YRS 03½ MOS
GREGORY LUCUTZ	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	04-23-2021	27 YRS 07½ MOS
SALLY MAIORCA	CHILDREN & FAMILY SERVICES Dept.#CH	06-30-2021	29 YRS 04 MOS
JAMES MC GOWAN III	PUBLIC WORKS Dept.#PW	05-30-2021	40 YRS 05½ MOS
ANDREW K. MOEY	PUBLIC WORKS Dept.#PW	05-15-2021	21 YRS ½ MOS
ALICE MOSESIAN	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	05-29-2021	26 YRS 03 MOS

# BOARD OF RETIREMENT MEETING OF JUNE 2, 2021

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
MA EVELYN R. NALUPA	PUBLIC HEALTH PROGRAM Dept.#PH	05-28-2021	36 YRS 06 MOS
CHERYL R. NICHOLS	DISTRICT ATTORNEY Dept.#DA	06-30-2021	42 YRS 00 MOS
GEORGIE G. NOVAK	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	06-30-2021	25 YRS 06 MOS
MARIA DE LOU OLIVARES DE	SHERIFF Dept.#SH	06-26-2021	11 YRS 00 MOS
UCHENNA A. ONUKWUSI	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.#HO	05-29-2021	16 YRS 07 MOS
JANET PAIJUK	INTERNAL SERVICES Dept.#IS	06-30-2021	24 YRS 00 MOS
CHIA C. PENGYUAN	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-30-2021	15 YRS 00 MOS
HIEU C. PHAN	AMBULATORY CARE NETWORK Dept.#HN	07-01-2021	19 YRS ½ MOS
DOLORES PICASSO	SHERIFF Dept.#SH	07-30-2021	30 YRS 01 MOS

# BOARD OF RETIREMENT MEETING OF JUNE 2, 2021

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ALEXANDER N. PUNO	INTERNAL SERVICES Dept.#IS	07-01-2021	17 YRS 06 MOS
MARK SANDS	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	07-06-2021	27 YRS 05½ MOS
ERLINDA L. SANTOS	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	03-31-2021	21 YRS 05 MOS
BILLIE J. SCOTT	MENTAL HEALTH Dept.#MH	05-31-2021	26 YRS 03½ MOS
MADELEINE G. SODERBERG	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	05-15-2021	18 YRS 01½ MOS
JULIE A. SORENSEN	PUBLIC LIBRARY Dept.#PL	05-29-2021	23 YRS 11 MOS
MARCELINA V. SOUFFLE	MENTAL HEALTH Dept.#MH	06-30-2021	20 YRS 01 MOS
TRACY A. STANFIELD	SHERIFF Dept.#SH	05-28-2021	24 YRS 06 MOS
ZOILA TAPIA	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.#HO	05-29-2021	26 YRS 01 MOS

# BOARD OF RETIREMENT MEETING OF JUNE 2, 2021

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
DIANA A. THOMAS	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	05-05-2021	37 YRS 11 MOS
MENG C. UNG	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-01-2021	33 YRS 08½ MOS
ROSARIO VELASQUEZ	CORRECTIONAL HEALTH Dept.#HC	05-01-2021	14 YRS 10 MOS
GARY S. WHITE	PROBATION DEPARTMENT Dept.#PB	06-01-2021	32 YRS 09½ MOS
SUSAN R. WILLIAMSON	SUPERIOR COURT/COUNTY CLERK Dept.#SC	05-29-2021	25 YRS ½ MOS
LORAIN J. WOLNISTY	PUBLIC HEALTH PROGRAM Dept.#PH	06-26-2021	19 YRS 03 MOS
DAVID WU	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	05-19-2021	26 YRS 05 MOS
DAISY S. WU	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-01-2021	14 YRS 09½ MOS
JEANNE Y. YAM	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	07-31-2021	22 YRS 03½ MOS

# BOARD OF RETIREMENT MEETING OF JUNE 2, 2021

## BENEFIT APPROVAL LIST

### SAFETY SURVIVOR APPLICATIONS

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
SANDRA S. ARAKAWA	SHERIFF Dept.#SH	02-09-2021	25 YRS 01½ MOS
SPOUSE of JAMIE J ARAKAWA dec'd on 02-08-2021, Sect. #31781.1			
RANDI N. MCKEE	SHERIFF Dept.#SH	03-29-2021	14 YRS 04 MOS
WIFE of JEFFREY R MCKEE dec'd on 03-28-2021, Sect. #31781.3			

**BOARD OF RETIREMENT MEETING OF JUNE 2, 2021**

**BENEFIT APPROVAL LIST**

**GENERAL SURVIVOR APPLICATIONS**

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
CESAR GARZA	PUBLIC HEALTH PROGRAM Dept.#PH	01-04-2021	25 YRS 01½ MOS
OTHER of NORMA ROBLES dec'd on 01-03-2021, Sect. #31781.3			

**BOARD OF RETIREMENT MEETING OF JUNE 2, 2021**

**BENEFIT APPROVAL LIST**

**SAFETY MEMBER APPLICATIONS FOR: SERVICE RETIREMENT FROM DEFERRED**

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
DAVID M. MURRAY	SHERIFF Dept.#SH	03-31-2021	01 YRS 08 MOS
RICK S. TANIGUCHI	SHERIFF Dept.#SH	05-01-2021	05 YRS 06 MOS

# BOARD OF RETIREMENT MEETING OF JUNE 2, 2021

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT FROM DEFERRED

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
NANCY R. ANDERSON	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	04-18-2021	15 YRS 05 MOS
MEIMY R. AWAD	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	04-21-2021	12 YRS 09 MOS
EARNESTINE BROWN	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	04-01-2021	34 YRS 06 MOS
LINDA L. BROWN	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	02-22-2021	03 YRS 01 MOS
BARBARA E. DOMINGUEZ	AMBULATORY CARE NETWORK Dept.#HN	04-20-2021	19 YRS 01 MOS
SONIA RENEE FOREMAN	SUPERIOR COURT/COUNTY CLERK Dept.#SC	05-05-2021	11 YRS ½ MOS
VALARIE J. FOSTER	SHERIFF Dept.#SH	04-15-2021	37 YRS 05½ MOS
YVONNE R. GIRARD	SUPERIOR COURT/COUNTY CLERK Dept.#SC	04-15-2021	09 YRS 11½ MOS
ROY D. GONTHIER	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	05-24-2021	07 YRS 02½ MOS



# BOARD OF RETIREMENT MEETING OF JUNE 2, 2021

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT FROM DEFERRED

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
KIRSTEN E. HART	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	04-08-2021	14 YRS 11 MOS
IOLA D. HENDERSON	COUNTY COUNSEL Dept.#CC	04-22-2021	42 YRS 02 MOS
KAMBIZ HOJJATY	PUBLIC WORKS Dept.#PW	04-21-2021	40 YRS 03 MOS
CHRIS M. HOLMAN	INTERNAL SERVICES Dept.#IS	05-08-2021	03 YRS 03 MOS
DEBORAH KEY	PUBLIC HEALTH PROGRAM Dept.#PH	04-18-2021	31 YRS ½ MOS
NANCY D. LOI	CHILDREN & FAMILY SERVICES Dept.#CH	04-15-2021	14 YRS 11 MOS
MARY K. LONGMIRE	CHILDREN & FAMILY SERVICES Dept.#CH	04-07-2021	15 YRS 02 MOS
PEDRO A. MARTINEZ	PARKS AND RECREATION Dept.#PK	03-01-2013	15 YRS 09 MOS
KAREN L. MOTA	SUPERIOR COURT/COUNTY CLERK Dept.#SC	06-01-2021	15 YRS 02 MOS

**BOARD OF RETIREMENT MEETING OF JUNE 2, 2021**

**BENEFIT APPROVAL LIST**

**GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT FROM DEFERRED**

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
MOSES MUNOZ	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	04-19-2021	14 YRS 04 MOS
JUAN A. PINTO	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	04-16-2021	12 YRS 07 MOS
OLIVIA ROSALES	SUPERIOR COURT/COUNTY CLERK Dept.#SC	05-08-2021	14 YRS 02 MOS
THERON L. WATKINS	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	05-29-2021	31 YRS 00 MOS

**BOARD OF RETIREMENT MEETING OF JUNE 2, 2021  
RESCISSIONS/CHANGES FROM BENEFIT APPROVAL LIST  
APPROVED ON MAY 5, 2021**

**SAFETY MEMBER APPLICATIONS FOR SERVICE RETIREMENT**

<b>NAME</b>	<b>DEPARTMENT</b>	<b>UPDATE</b>
CLIFTON S WILLIAMS	SHERIFF	CHANGE OF DATE TO May 01, 2021

**GENERAL MEMBER APPLICATIONS FOR SERVICE RETIREMENT**

<b>NAME</b>	<b>DEPARTMENT</b>	<b>UPDATE</b>
MARLENE MOSCATO	COASTAL CLUSTER- HARBOR/UCLA MC	CHANGE OF DATE TO May 29, 2021
SARAH F VIDAURRE	COASTAL CLUSTER- HARBOR/UCLA MC	CHANGE OF DATE TO May 29, 2021
ENRIQUE CARRILLO	SHERIFF	CHANGE OF DATE TO March 30, 2021
KIMBERLY L WELLS	PROBATION DEPARTMENT	CHANGE OF DATE TO May 29, 2021
OZIE M SHORTER	FIRE DEPT	RESCINDED RETIREMENT
ROMEO F INGRESO	SHERIFF	CHANGE OF DATE TO August 4, 2021
DONNA LEBOWITZ	DISTRICT ATTORNEY	RESCINDED RETIREMENT
TODD M JONES	INTERNAL SERVICES	CHANGE OF DATE TO May 28, 2021
ERNESTO L CLEOFE	HEALTH SERVICES ADMINISTRATION	CHANGE OF DATE TO May 01, 2021
TERESA R CELADA	MENTAL HEALTH	CHANGE OF DATE TO May 01, 2021

May 20, 2021

TO: Each Trustee  
Board of Retirement

FROM: Operations Oversight Committee  
Shawn R. Kehoe, Chair  
Herman B. Santos, Vice Chair  
Ronald A. Okum  
Les Robbins  
Vivian H. Gray, Alternate

FOR: June 2, 2021 Board of Retirement Meeting

SUBJECT: LACERA's Mainframe History, Strategy, and Options

## **RECOMMENDATION**

It is recommended that the Board of Retirement approve to move our current mainframe technology to a hosted, multi-tenant platform, while LACERA prepares to move to a server-based solution and authorize LACERA to enter into a contract for such services with Mainline Information Systems partnered with Data Management, Inc. at a one-time cost of \$15,000, and an annual cost of \$342,000.

## **BACKGROUND**

LACERA has a long history with mainframe technology. We are now at a crossroads with this technology and need to review our strategy and current options.

### ***What are mainframe computers?***

Mainframe computers were introduced in the 1950s. They are high performance computers with large memory and processing power that handle billions of calculations and transactions in real-time. Many large organizations use mainframes for critical applications and bulk data processing. While the technology has been declared dead many times in the past, the use of mainframes continues.

### ***What is LACERA's history with mainframe computers?***

LACERA's first Pension Administration System was developed for the mainframe in 1988 and was written in COBOL. This system provided both on-line and batch programs to support our members from the moment they are hired, through their active membership, through their transition to retirement, and eventually supporting their survivors and beneficiaries after their passing.

LACERA has upgraded components on the mainframe over the years. The original data file structure on our mainframe was updated to DB2, IBM's relational database management system. All on-line activity was migrated to a newer Pension Administration System known as Workspace. Workspace is written in enterprise Java, is compatible with the leading web browsers, and is a server-based solution. In 2012, 1,500,000 lines of COBOL code running on the mainframe were decommissioned. There are still many mission critical batch programs and member data on the mainframe.

While the Systems Division continues to opportunistically retire programs on the mainframe as their functionality is moved to Workspace, our current mainframe needs to be addressed. It is three generations behind current models and now has upgrade limitations. The LACERA staff that support the mainframe will be retiring and finding new, permanent resources to support mainframe technology is challenging.

In the midyear budget adjustments approved by the Board of Retirement for FY 2020-21, funding was approved to pursue a solution for our immediate mainframe challenges. The Systems Division has explored the options available to us, has presented the options to LACERA's newly formed IT Coordination Council, and is asking that the Operations Oversight Committee accept the direction recommended by the IT Coordination Council, as described below.

### **Mainframe Strategy**

LACERA's strategy for the mainframe is to decommission it in three years. While it has been a reliable workhorse for the organization, there are no longer enough applications running on it to justify its expense. In addition, there is an established Pension Administration System to which the remaining programs could be migrated. Lastly, the member data housed on our mainframe can be ported to several other platforms and several other relational database management systems.

### **Mainframe Options**

LACERA has four options available while continuing to use mainframe technology during the next three years.

The first option is to do nothing and stay on the current course. The existing hardware should continue to function for the next three years, and IBM should continue to provide replacement parts and technical support. Additionally, it is possible to find third-party support to continue operations during this time. However, LACERA's current hardware prevents software upgrades that are required for outstanding audit recommendations such as encryption and mitigation of data loss and downtime risks.

The second option is to modernize our on-premises mainframe. To alleviate the upgrade limitations that can stop critical security and feature updates, a new mainframe system must be purchased. This will include backup technology that allows data be transferred electronically offsite for disaster recovery and business continuity. The hardware cost to

upgrade the mainframe is estimated at approximately \$800,000, and the upgrade would require professional services for an additional cost.

The third option is to migrate our mainframe operations to a solution provided by Los Angeles County's Internal Services Department (ISD). While LACERA welcomes collaboration with ISD, using their hosting service would require migration to a new security system, job scheduling system, and upgrades of both COBOL and DB2. The estimate for annual services costs is in excess of one million dollars. We do not believe the solution provided by ISD is the right choice for LACERA at this time because the changes required to our system would delay the migration for 6 months to one year and this solution would increase our annual mainframe costs.

The fourth and final option is to migrate our mainframe to a hosted solution provided by a private company. Systems has identified various vendors that specialize in hosting mainframe workloads allowing their customers to use the latest hardware and software without incurring the high costs of hardware upgrades and maintenance as described above.

These vendors offer options to lease a portion of a mainframe, built and configured based on our requirements, which shares hardware resources with other customers. This is commonly known as multi-tenant and allows vendors to provide lower costs to their clients.

A multi-tenant option does come with some security concerns. While the mainframe is partitioned and includes enterprise security protocols so that no other tenant has access to each other, it is still all on the mainframe and there is a slight risk that an issue impacting one tenant may also impact another. To mitigate this risk, vendors offer the option to have a dedicated mainframe to alleviate this concern. However, this comes at a higher cost, as much as three times more than multi-tenant with some vendors. A dedicated mainframe will provide a more secure environment, but it is not recommended as our current workload is minimal for base configurations vendors provide.

Vendors are aware that security, whether in a shared or dedicated environment, is a top priority. They employ high security measures at their physical sites and in multi-tenant environments to guarantee no one can gain access to our data. Security reports (SOC) and site visits are provided to allow clients to validate their security measures.

The Systems Division and the Information Security team have vetted various vendors by focusing on the security they provide, their specialization level, the site's physical location, cost, and recommendations by their existing customers.

### **Justification and Recommendation**

The Systems Division and the Information Security team evaluated all four options outlined above and recommend migrating to a multi-tenant, hosted solution. This migration will ensure the stability of LACERA's mission critical applications and data until

we complete the transition of the programs and data to another platform. It will provide LACERA an improved disaster recovery solution that reduces both potential downtime and data loss. This option will also give LACERA access to the latest hardware and software without bearing the overhead cost for licensing and upgrades.

Three vendors that offer competing, hosting solutions were evaluated: IBM, Mainline Information Systems, and PSR Inc. While all three vendors are industry leaders with decades of experience in mainframe technology, the Systems Division recommends Mainline Information Systems for LACERA. Mainline stands apart because they have partnered with Data Management Inc. to deliver a superior disaster recovery solution at their primary hosting site, offer the lowest one time set up fee, will perform the migration for LACERA, and offer the closest primary hosting site. In addition, Mainline has been a business partner of LACERA's for over 20 years providing managed professional services for our mainframe solution and has an established track record of reliability, superior customer service, and strong expertise in mainframe technology.

The Systems Division presented a proposal to the IT Coordination Council to enter into an agreement with Mainline Information Systems to host LACERA's mainframe operations. The Council evaluated the bids and were unanimously in favor of the recommended proposal. While the funding for the migration and hosting services was approved in our midyear budget increases for FY 2020-21, the yearly service fees to Mainline exceed \$150,000. LACERA's procurement policy requires approval from the Board of Retirement for services that exceed \$150,000 a year. We ask that the Committee recommend the Board of Retirement approve the yearly service fees for mainframe hosting services.

#### Mainline / DMI Disclosure

As we prepared this memo for the presentation at the June 2, 2021 Board of Retirement Meeting, we realized that the previous memo to the Operations Oversight Committee did not explain the relationship between Mainline and Data Management, Inc., as clearly as we should have. There were references to Mainline/DMI in the accompanying presentation. For transparency, we would like to correct this oversight. The proposed option to the Operations Oversight Committee was to contract with Mainline Information Systems to host our system. Mainline Information Systems will be providing all the maintenance and upkeep of the system, and LACERA would be contracting with them.

However, Mainline contracts with Data Management, Inc. (DMI) to use their data centers and hardware. When LACERA considered Mainline, and evaluated Mainline's security protocols, financial history, and overall business functions, we also validated DMI. The memo from Interim Chief Information Security Officer, Bob Schlotfeld, discusses the vetting process and confirms that the full relationship and operations of both companies were considered in the evaluation and his risk management evaluation program. Finally, we would like to share that of the three vendors we considered for this project, two of them contracted with a third party for data center services.

## **CONCLUSION**

LACERA needs to make strategic decisions for the mainframe systems and determine next steps for the mission critical programs and data that run on this technology. The Systems Division plans to migrate the programs and data to a new platform in the next three years. The new platform target is our new Pension Administration System known as Workspace. This system already contains many of the business rules that are used in the batch processes. The three-year timeframe allows the Systems Division to adequately plan and resource the project given the number of other IT projects in the pipeline for the Systems Division and the importance of the programs and data running on the mainframe. In the meantime, the current mainframe needs to be addressed. It is three generations behind, the critical staff members that support it will be retiring, and it is difficult to find resources to support it.

We ask that the Committee accepts the direction recommended by LACERA's IT Coordination Council to migrate the mainframe to a hosted solution and to use Mainline in partnership with Data Management Inc. for the migration and hosting services.

**THEREFORE, IT IS RECOMMENDED THAT THE BOARD** approve to move our current mainframe technology to a hosted, multi-tenant platform, while LACERA prepares to move to a server-based solution and authorize LACERA to enter into a contract for such services with Mainline Information Systems in partnership with Data Management Inc. at a one-time cost of \$15,000, and an annual cost of \$342,000. These funds have been included in the FY 2020-21 budget and will continue until the mainframe is migrated to a server-based solution and then decommissioned.

Reviewed and Approved:



Santos H. Kreimann  
Chief Executive Officer

Attachment (Private and Confidential)

c: JJ Popowich  
Kathy Delino  
Bob Schlotfeld  
Summy Voong  
Celso Templo  
Eddie Paz





May 28, 2021

**TO:** Each Trustee  
Board of Retirement

**SUBJECT:** Board of Retirement Meeting on June 2, 2021 – Item VII. A

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No written materials are presently available for this item. A supplemental document regarding the above-mentioned item will be provided as information becomes available.

**FOR INFORMATION ONLY**

May 17, 2021

**TO:** Each Trustee  
Board of Retirement

**FROM:** Roberta Van Nortrick  
Training Coordinator, Project Manager

**FOR:** June 2, 2021 Board of Retirement Meeting

**SUBJECT: EMPLOYEE ENGAGEMENT SURVEY RESULTS**

In February 2021, it was shared with your Board that LACERA staff participated in an Employee Engagement Survey. This survey was presented to staff as a means for the Executive Team and management to identify areas where staff's experience at LACERA may be improved and as a direct result, fortify our execution of LACERA's mission. We also want to see where LACERA excels so that we may continue what we are doing to maintain high engagement in those areas. We received a total of 352 responses equivalent to an 86% response rate. The survey results will be the basis of our action plan to preserve the strengths at LACERA and to provide insight into the areas where improvement may be achieved.

LACERA's Consultant, Mr. Bob Lavigna, from CPS HR Consulting, will present the results for LACERA's first Employee Engagement Survey. The presentation slides are attached for your reference.

The brief summary of our consultant's background is as follows:

**Bob Lavigna** – Bob is the Director of the *Institute for Public Sector Employee Engagement*, a division of CPS HR Consulting, an independent and self-supporting government agency. His book, *Engaging Government Employees* (published by HarperCollins), is the first book to focus exclusively on employee engagement in the public sector.

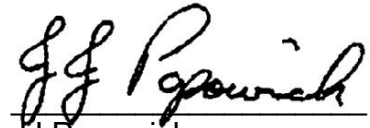
His previous positions include Assistant Vice Chancellor and Director of HR for the University of Wisconsin, Vice President-Research for the Partnership for Public Service, and Director of the state of Wisconsin's merit system. Bob began his career with the U.S. Government Accountability Office.

He was selected as a "Public Official of the Year" by *Governing* magazine and is an elected Fellow of the National Academy of Public Administration. Bob is a past President of the International Public Management Association for HR.

He has a B.A. from George Washington University and an M.S. in Human Resources from Cornell University.

We look forward to your feedback as the results of LACERA's Employee Engagement Survey are presented.

Reviewed and Approved:

A handwritten signature in black ink, appearing to read "JJ Popowich", written over a horizontal line.

JJ Popowich  
Assistant Executive Officer

Attachment



# 2021 Engagement Survey Results

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**LACERA**

**June 2, 2021**

CPS HR  CONSULTING™



## Background

- ◆ This report summarizes the overall results from LACERA employee engagement survey.
- ◆ The survey was conducted by the Institute for Public Sector Employee Engagement, a division of CPS HR Consulting, an independent government agency.
- ◆ The survey included 68 questions in 10 categories, 6 questions in an engagement index, 6 demographic questions, 1 question asking about plans to stay or leave, and 3 open-ended questions.
- ◆ CPS HR administered the survey from Feb. 1 - 19, 2021.
- ◆ 86% (352) of employees responded to the survey.

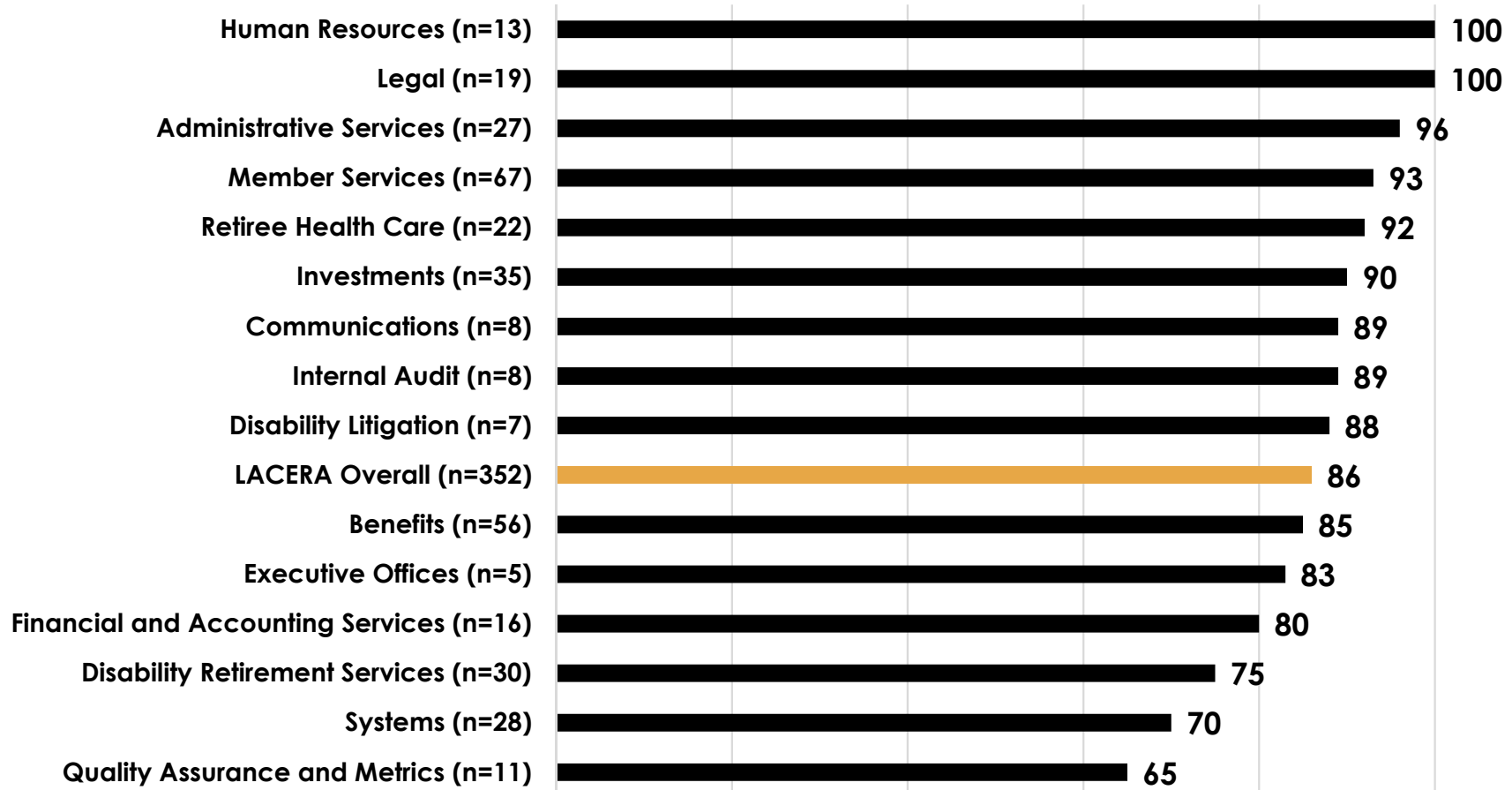


# Institute for Public Sector Employee Engagement Model



Adapted from *Engaging Government Employees* (American Management Association)  
by Bob Lavigna

# Response Rates (%) – Division



# Levels of Engagement

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# Calculating Engagement Scores

Survey respondents rated their level of agreement with 6 engagement questions, using the following scale:

- 1 = strongly disagree
- 2 = disagree
- 3 = neither agree or disagree
- 4 = agree
- 5 = strongly agree
- X = don't know or no basis to judge

Based on the responses to these questions, we then calculated a mean engagement score for each employee.

Note: We require responses to at least 4 of these statements to calculate a score.

## Engagement Questions

1. I would recommend LACERA as a good place to work
2. I am proud to work for LACERA
3. I feel a strong personal attachment to LACERA
4. LACERA inspires me to do the best in my job
5. I feel comfortable being myself at work
6. LACERA motivates me to help achieve its mission

# Calculating Engagement Levels

We then calculated the percentage of employees at each engagement level

## **Fully Engaged**

Mean score 4 or above on the six engagement questions

## **Somewhat Engaged**

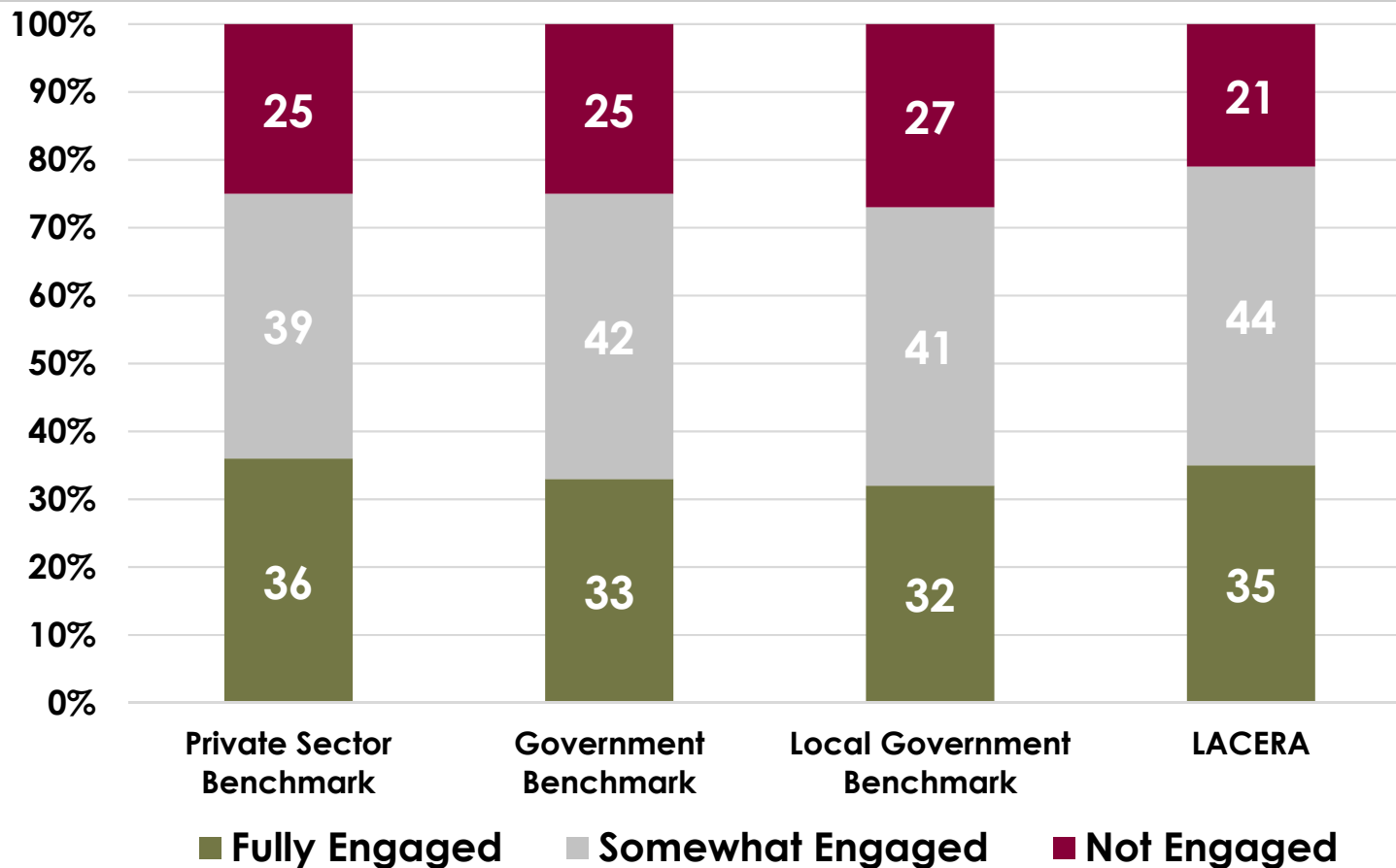
Mean score between 3 and 4 on the six engagement questions

## **Not Engaged**

Mean score 3 or below on the six engagement questions



# Overall Engagement Levels



The fully engaged score for LACERA employees (35%) is above our government benchmarks.

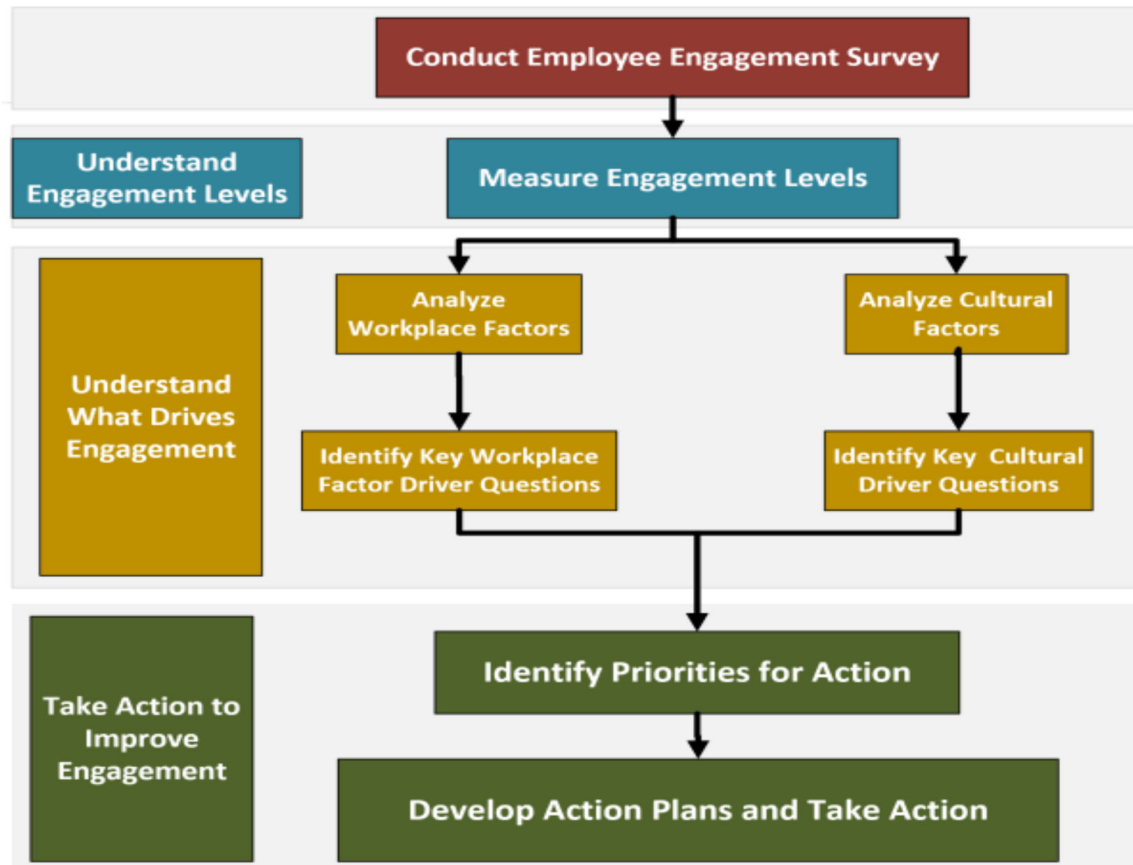
The LACERA somewhat-engaged score (44%) is above all benchmarks, and the not-engaged score (21%) is below the government benchmarks.

# Drivers of Engagement – Workplace Factors

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# Analytical Model



# Drivers of Engagement – Workplace Factors

## Workplace Factors

Previous research has found that these factors, or drivers, are related to employee engagement.

- ◆ My Work
- ◆ LACERA's Mission
- ◆ My Division
- ◆ My Supervisor
- ◆ My Assistant Manager or Section Head
- ◆ Leadership and Managing Change
- ◆ Training and Development
- ◆ Resources and Workload

## Calculating Factor Scores

For each factor, we calculated an average score on a scale of 0-100 (i.e., percent positive responses).

# Drivers of Engagement

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## Calculating the Drivers

We performed statistical analysis to determine the extent to which each workplace factor and culture question influences (drives) the overall engagement score, on a scale of 0-100 percent.

# Drivers of Engagement

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## Recommended Focus Areas

The following charts combine influence (relative weight from key driver analysis) and score (average % positive) to reveal the overall workplace areas – if maintained or improved – that are likely to have the biggest impact on the engagement score.



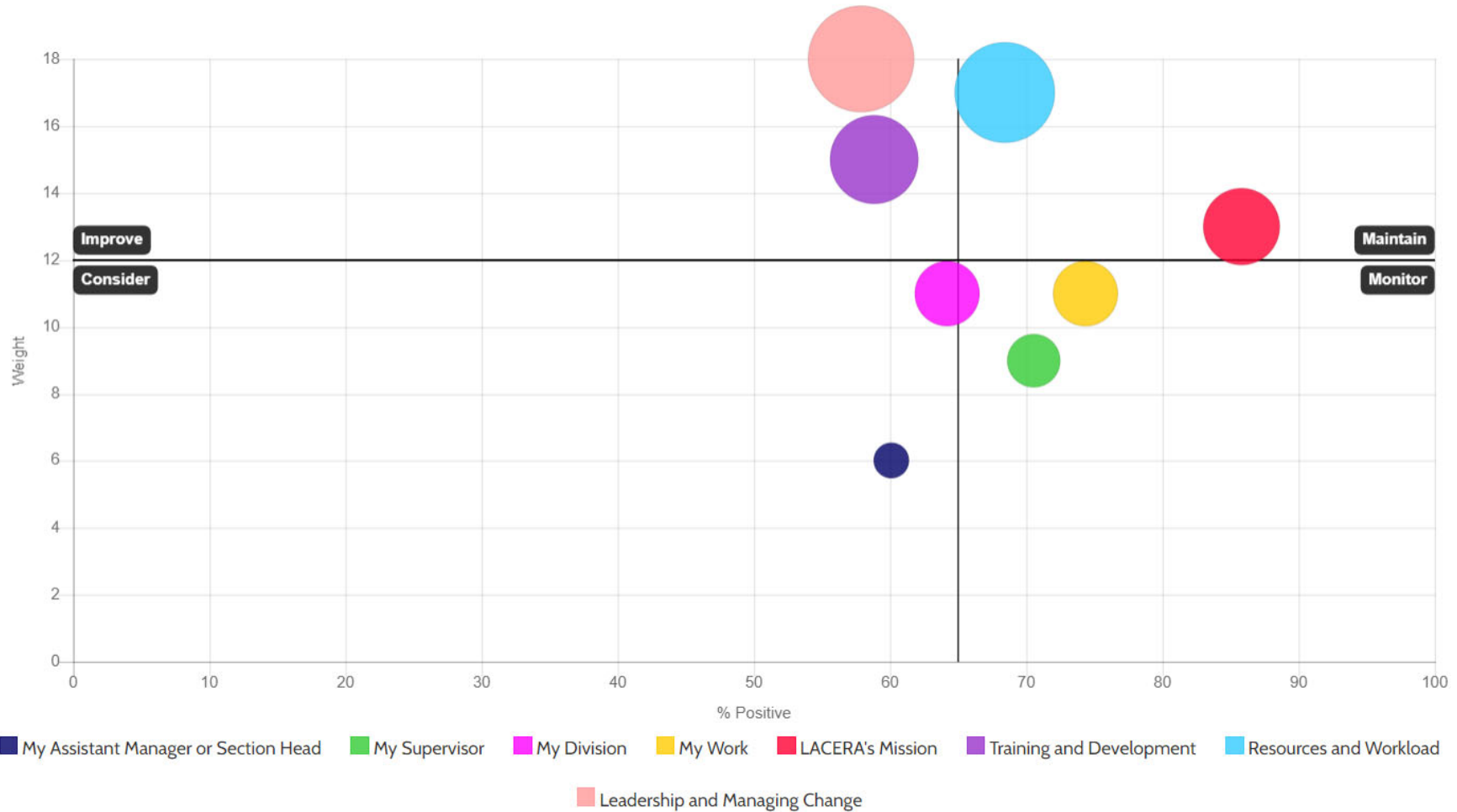
# Quadrant Chart – Definitions

Below are the definitions of the four quadrants in the following charts. We suggest that you pay attention to the questions in the “**Improve**” and “**Maintain**” quadrants.

<p><b>IMPROVE</b> <b><u>High Influence</u> / Low Score</b></p> <p>Focus on these low-scoring but high-influence questions because they have the greatest potential to <b>improve the overall engagement score</b>.</p>	<p><b>MAINTAIN</b> <b><u>High Influence</u> / High Score</b></p> <p>Scores on these high-influence questions are already high. Therefore, continue to focus on these areas to <b>maintain the engagement score</b>.</p>
<p><b>CONSIDER</b> <b>Low Influence / Low Score</b></p> <p>Although these are low-influence questions, the relatively low scores suggest that they may be considered, but as lower priorities than the high-influence questions.</p>	<p><b>MONITOR</b> <b>Low Influence / High Score</b></p> <p>These are already high-scoring questions but are relatively lower in influence. Therefore, monitor these factors to assure the scores for these questions do not decline.</p>



# Overall Workplace Factors



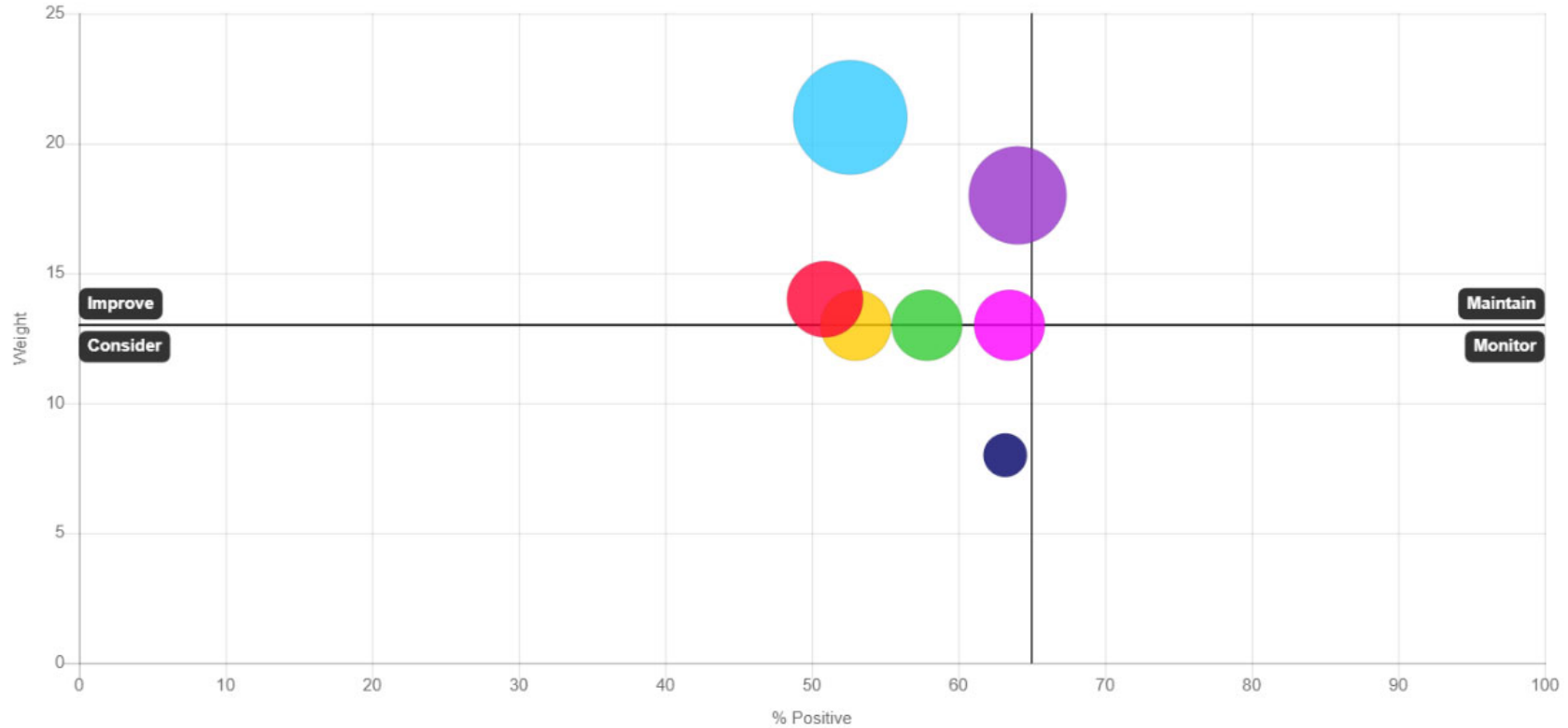
# Drivers of Engagement – Questions

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## Recommended Focus Areas – Question-Level

The following charts combine influence (relative weight from key driver analysis) and score (% positive), for all employees, to reveal the questions – if maintained or improved – that are likely to have the biggest impact on the engagement score.

# Leadership and Managing Change



■ Senior leaders at LACERA are sufficiently visible (e.g., can be seen in action)

■ I believe the actions of senior leaders are consistent with LACERA's values

■ LACERA keeps me informed about matters that affect me

■ When changes are made at LACERA they are usually for the better

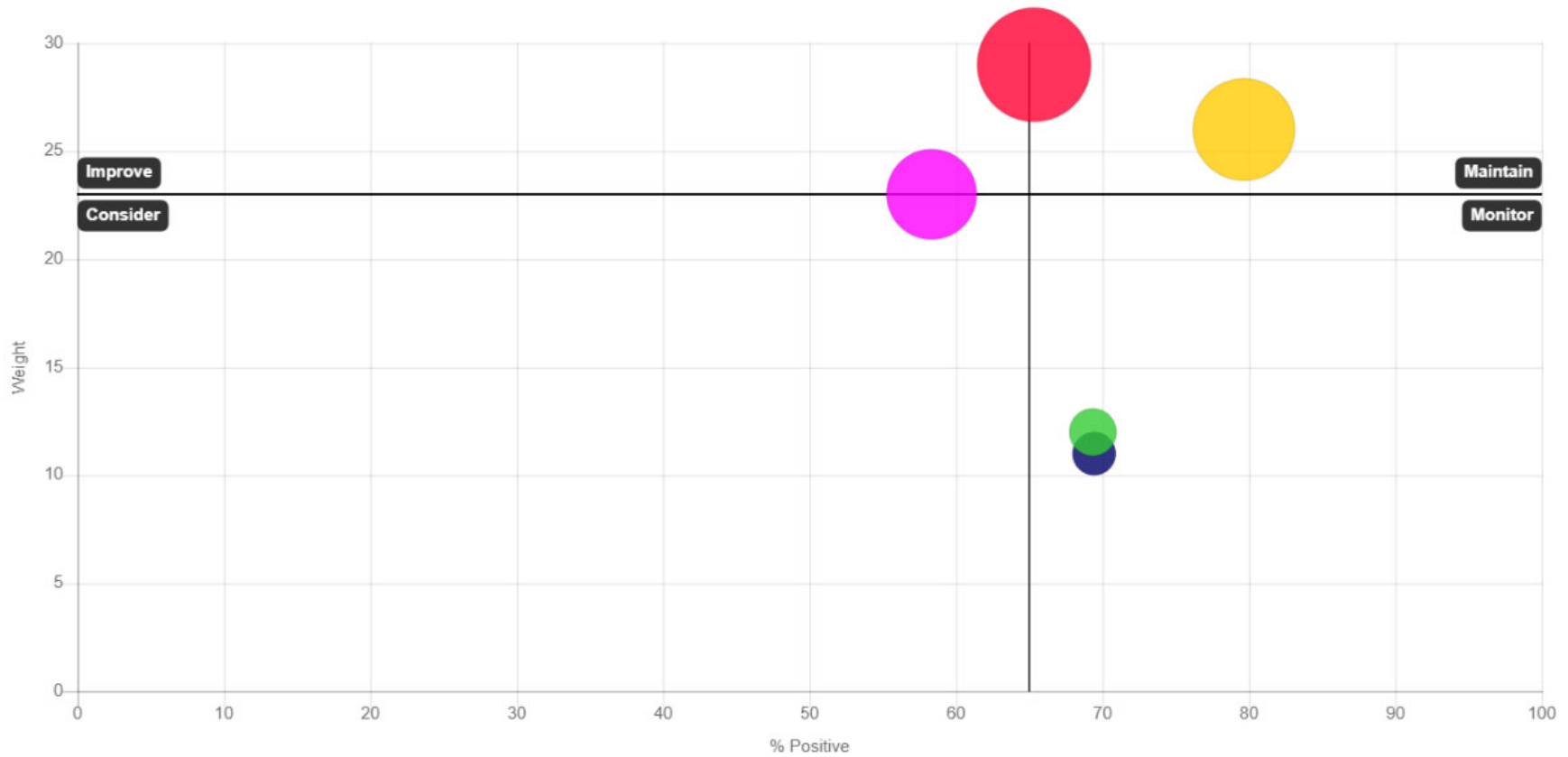
■ Senior leaders value ideas from Staff Members

■ Senior leaders care about my health and wellness

■ I feel that LACERA as a whole is managed well



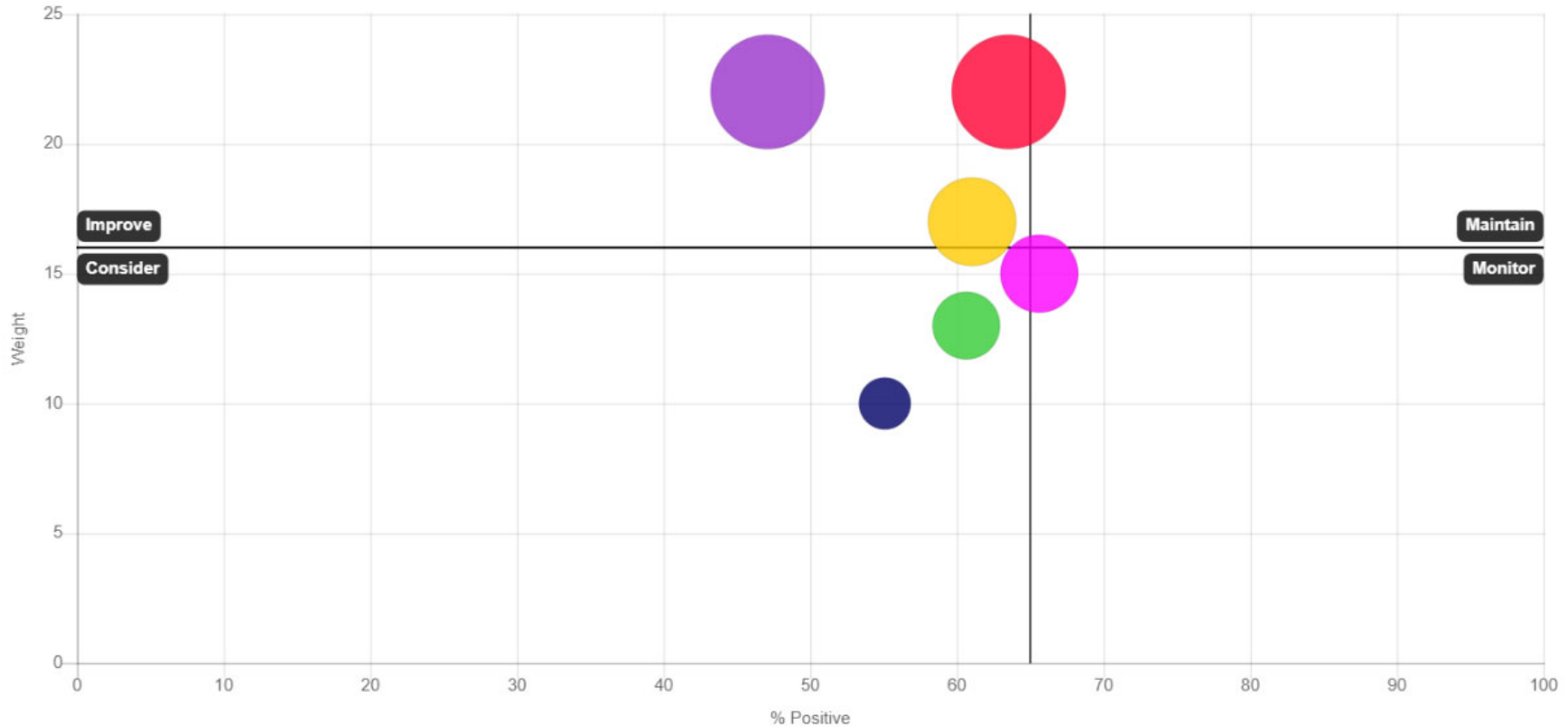
# Resources and Workload



- I can tolerate the pressure of my work very well   ■ I achieve a good balance between my work life and my private life   ■ My workload is reasonable   ■ I have clear work objectives
- I have the resources I need to do my job well



# Training and Development



■ Training and development activities I have completed in the past 12 months have helped to improve my performance

■ Training and development activities I have completed while working for LACERA are helping me to develop in my career

■ I get the training I need to do my job well

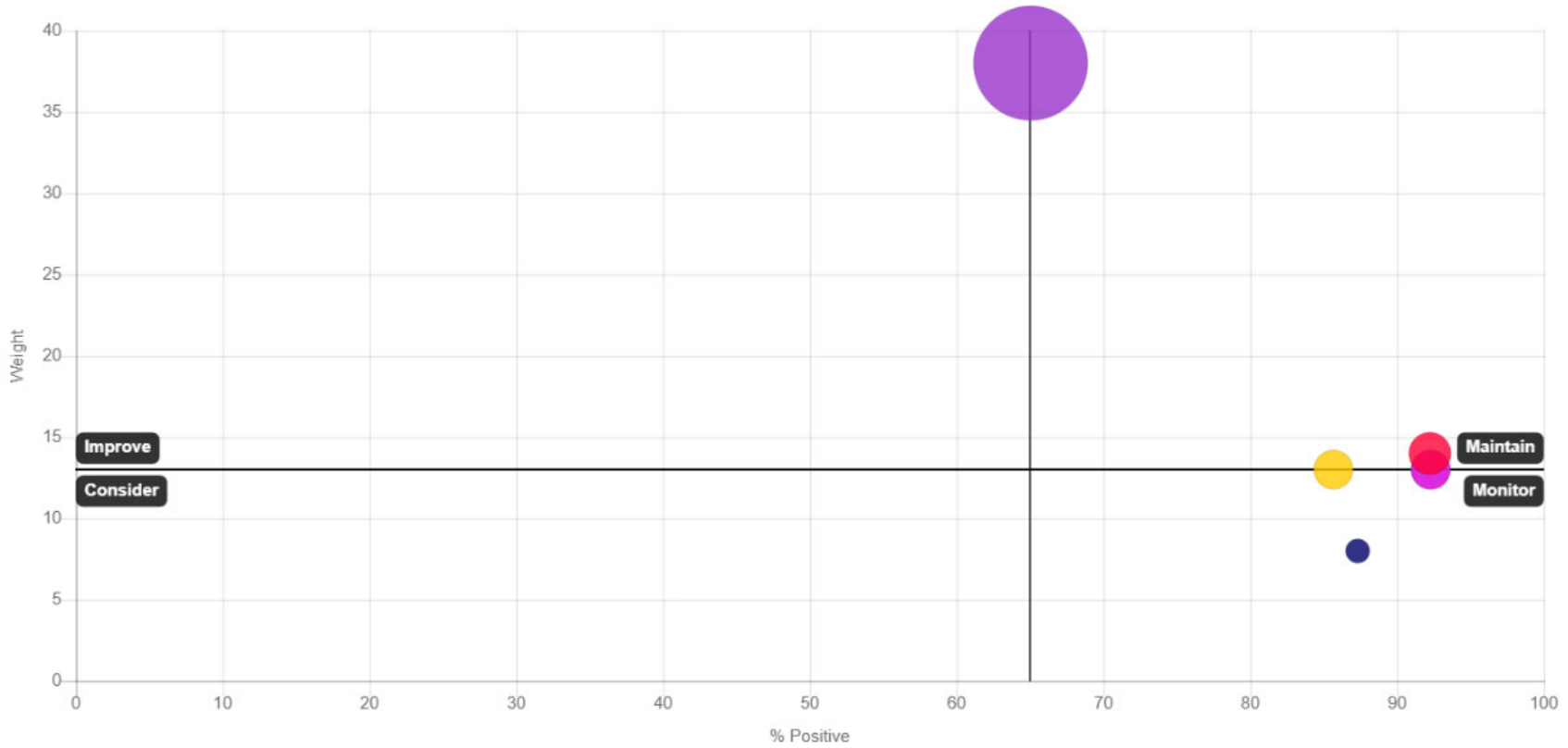
■ I am given a real opportunity to improve my skills at LACERA

■ I get the information I need to do my job well

■ I believe there are good career opportunities for me at LACERA



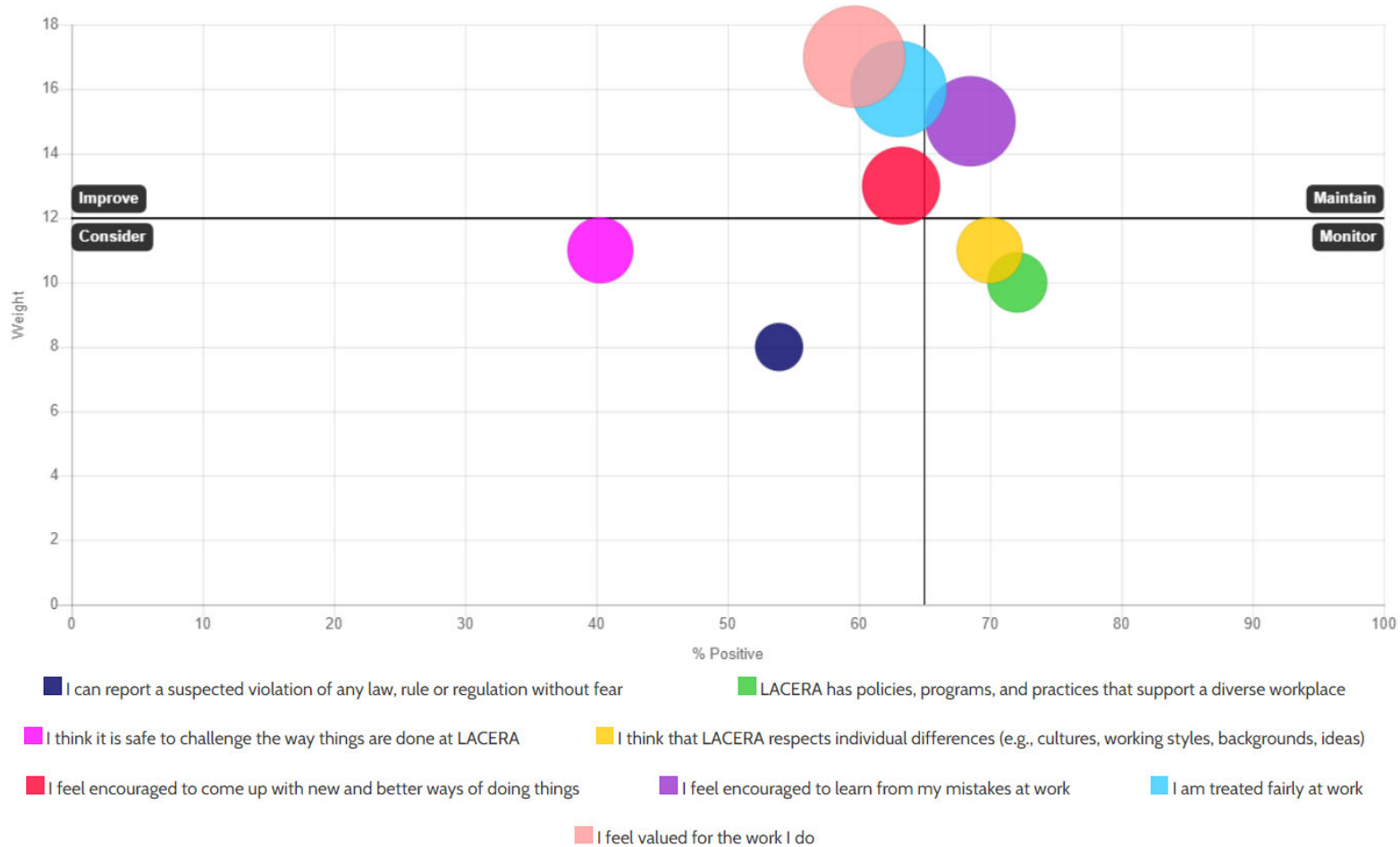
# LACERA's Mission



- I feel I can make a difference in the lives of our Members by working here
- I have a clear understanding of LACERA's mission
- LACERA's mission is important to me
- I feel that I personally contribute to LACERA's successes
- I know how my work supports LACERA's mission
- LACERA's values and mission inspire me



# Organizational Culture







## Summary – Areas to Improve

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- ◆ I feel that LACERA as a whole is managed well
- ◆ Senior leaders care about my health and wellness
- ◆ I get the information I need to do my job well
- ◆ I am given a real opportunity to improve my skills at LACERA
- ◆ I believe there are good career opportunities for me at LACERA
- ◆ I feel valued for the work I do
- ◆ I am treated fairly at work
- ◆ I feel encouraged to come up with new and better ways of doing things

## **Summary – Areas to Maintain**

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- ◆ I have clear work objectives
- ◆ I feel encouraged to learn from my mistakes at work
- ◆ LACERA's values and mission inspire me
- ◆ I have the resources I need to do my job well

# Additional Question-Level Analysis

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# Highest-Scoring Questions (% Positive)

Employees were **MOST positive** on the following questions:

QUESTION	NEGATIVE	NEUTRAL	POSITIVE ▼
I have a clear understanding of LACERA's mission	2.6%	5.1%	92.3%
LACERA's mission is important to me	1.4%	6.3%	92.3%
I know how my work supports LACERA's mission	3.4%	4.3%	92.2%
I like the kind of work I do	5.2%	7.2%	87.6%
I feel I can make a difference in the lives of our Members by working here	2.9%	9.8%	87.3%
I know what is expected of me on the job	7.2%	6.9%	86%
I feel that I personally contribute to LACERA's successes	4.6%	9.7%	85.7%
I am aware of LACERA's anonymous Ethics Hotline to report concerns	7%	7.3%	85.7%



# Lowest-Scoring Questions (% Positive)

Employees were **LEAST positive** on the following questions:

QUESTION	NEGATIVE	NEUTRAL	POSITIVE ▲
I think it is safe to challenge the way things are done at LACERA	32.8%	26.9%	40.3%
There are resources available to me through LACERA that allow me to openly discuss my personal feelings	25.9%	31.9%	42.2%
The wellness benefits offered by LACERA have improved my physical and/or mental health	14.1%	41%	44.9%
I believe there are good career opportunities for me at LACERA	28.5%	24.4%	47.1%
My Assistant Manager or Section Head has shown a genuine interest in my career aspirations	24.5%	26.9%	48.6%



# Largest Positive Gaps

Questions where employees were **MORE positive** than the local government benchmarks.

“Gap” is percentage point difference (on positive responses) from local government benchmarks

QUESTION	NEGATIVE	NEUTRAL	POSITIVE	MEAN	GAP ▼
LACERA's mission is important to me	1.4%	6.3%	92.3%	4.43	21
I feel I can make a difference in the lives of our Members by working here	2.9%	9.8%	87.3%	4.32	17
I am proud to work for LACERA	5.1%	16.9%	78%	4.06	16
My supervisor motivates me to be more effective in my job	17.3%	17.1%	65.6%	3.72	13
When changes are made at LACERA they are usually for the better	12.9%	34.1%	53%	3.51	13
My supervisor provides constructive feedback on my job performance	15%	15%	69.9%	3.79	11
Senior leaders at LACERA are sufficiently visible (e.g., can be seen in action)	18.6%	18.3%	63.2%	3.58	11
I feel encouraged to come up with new and better ways of doing things	16.4%	20.4%	63.2%	3.62	11



# Largest Negative Gaps

Questions where employees were **LESS positive** than the local government benchmarks.

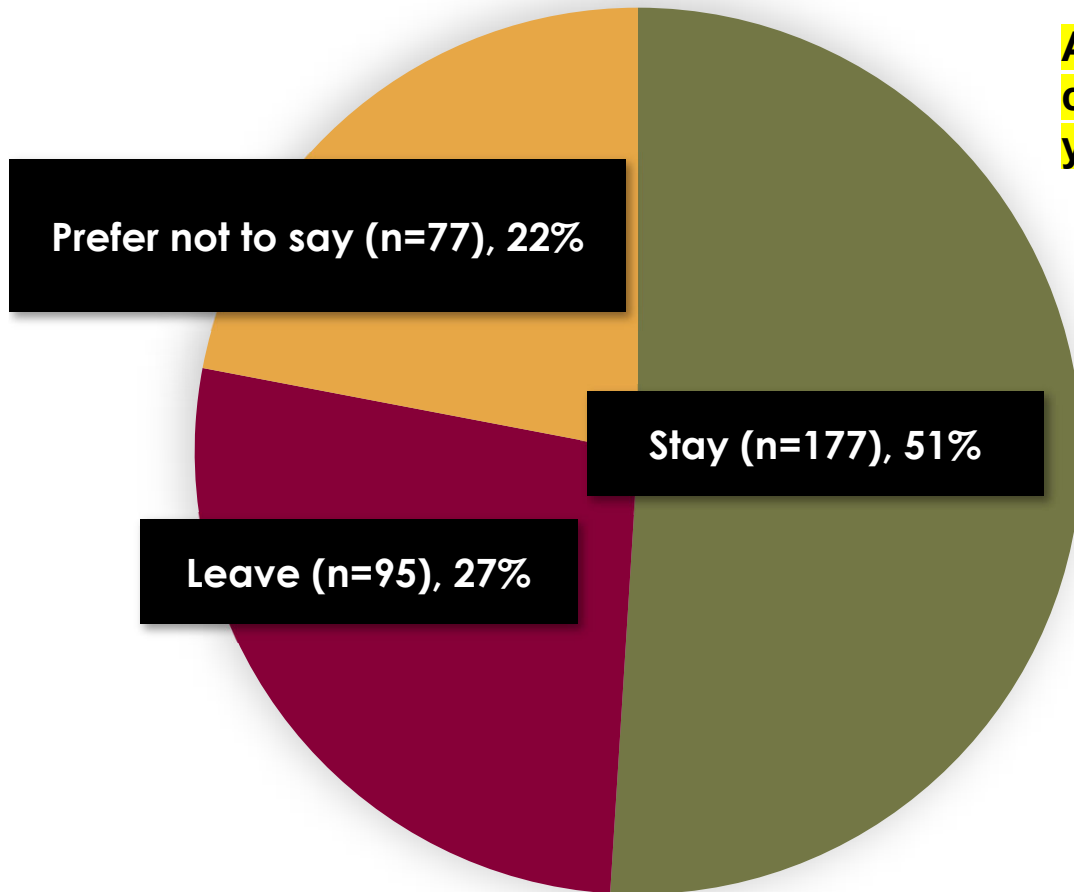
“Gap” is percentage point difference (on positive responses) from local government benchmarks

QUESTION	NEGATIVE	NEUTRAL	POSITIVE	MEAN	GAP ▲
People in my division share information with each other	21.1%	15.6%	63.3%	3.56	-18
People in my division are held accountable for results	28%	17.9%	54.2%	3.29	-15
I feel comfortable being myself at work	15.7%	18%	66.3%	3.69	-12
People in my division care about me as a person	15.6%	18%	66.4%	3.68	-11
I have the resources I need to do my job well	19.8%	14.9%	65.3%	3.59	-10



# Intent to Stay or Leave

Are you considering leaving your current position within the next year, and if so, why?



■ Stay (n=177)

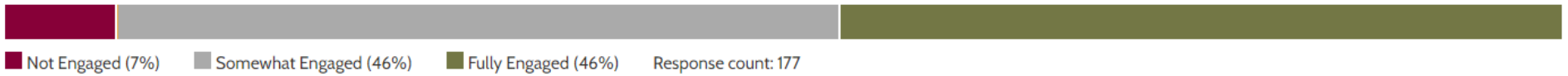
■ Leave (n=95)

■ Prefer not to say (n=77)

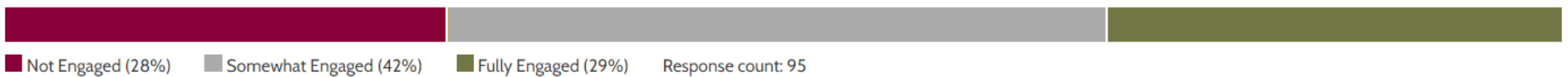


# Engagement Levels by Intent to Leave

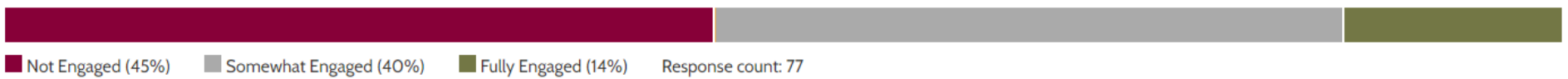
## 1. Stay



## 2. Leave



## 3. Prefer not to say





# Engagement Levels by Intent to Leave Reason (1 of 2)

1. No



■ Not Engaged (7%) ■ Somewhat Engaged (46%) ■ Fully Engaged (46%) Response count: 177

2. Yes, to pursue a different position within my current Division



■ Not Engaged (7%) ■ Somewhat Engaged (39%) ■ Fully Engaged (54%) Response count: 28

3. Yes, to pursue a position in another Division



■ Not Engaged (14%) ■ Somewhat Engaged (57%) ■ Fully Engaged (29%) Response count: 21

4. Yes, to pursue a position outside of LACERA – in another government agency (e.g., city or county, state, or federal)



■ Not Engaged (36%) ■ Somewhat Engaged (55%) ■ Fully Engaged (9%) Response count: 11

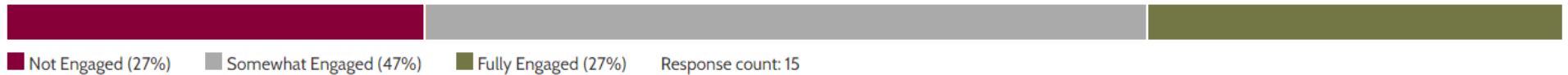


# Engagement Levels by Intent to Leave Reason (2 of 2)

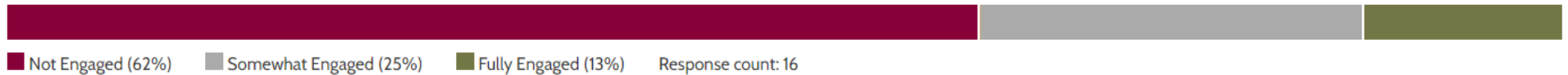
5. Yes, to pursue a position outside of government (e.g., in a private sector company)

Not Available - There are not 10 or more responses for this group.

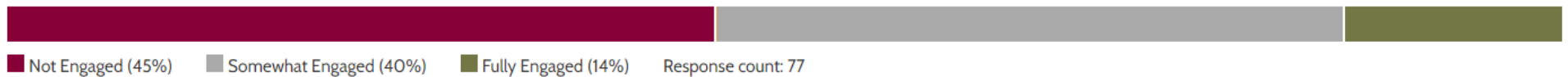
6. Yes, to retire



7. Yes, for other reasons



8. Prefer not to say



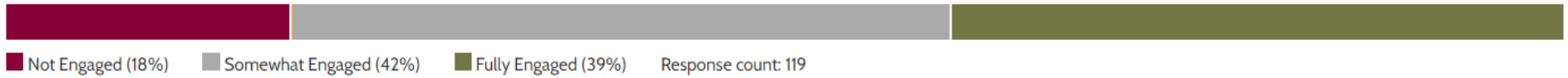
# Results by Demographic Segment

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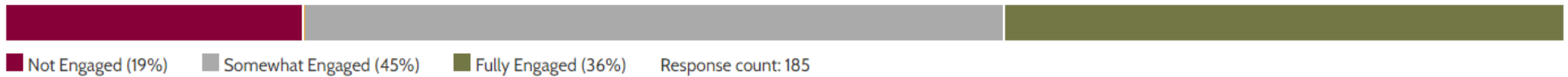


# Engagement Levels by Gender

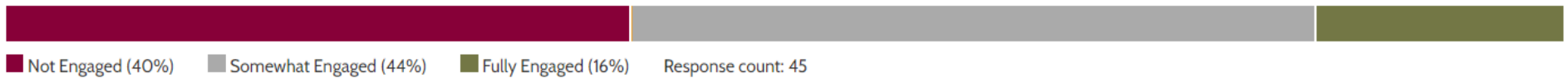
1. Male



2. Female



4. Prefer not to say



No respondents selected "3. Non-binary or other gender."



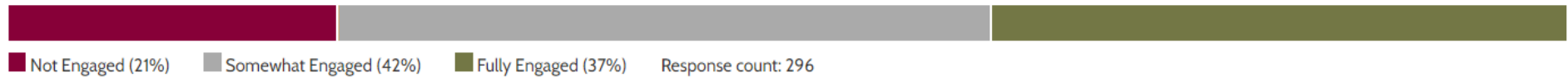
# Engagement Levels by LGBTQ+

Do you consider yourself to be a member of the LGBTQ+ Community?

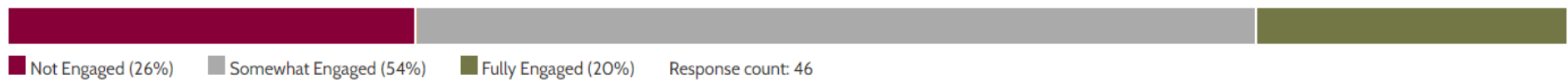
1. Yes

Not Available - There are not 10 or more responses for this group.

2. No



3. Prefer not to say





# Engagement Levels by Age (1 of 2)

C. 25 to 34



■ Not Engaged (25%) ■ Somewhat Engaged (46%) ■ Fully Engaged (29%) Response count: 28

D. 35 to 44



■ Not Engaged (21%) ■ Somewhat Engaged (46%) ■ Fully Engaged (33%) Response count: 87

E. 45 to 54



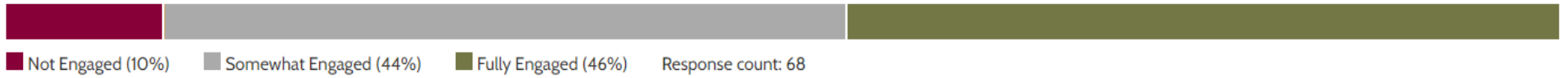
■ Not Engaged (15%) ■ Somewhat Engaged (46%) ■ Fully Engaged (39%) Response count: 89

No respondents selected "A. 19 or under" or "B. 20 to 24."

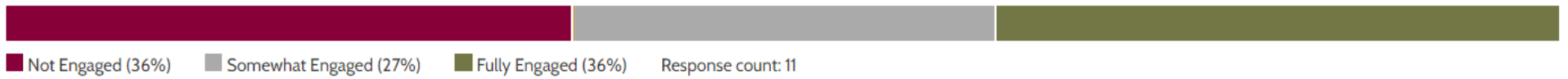


# Engagement Levels by Age (2 of 2)

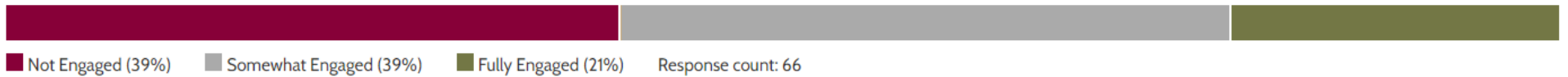
F. 55 to 64



G. 65 or over



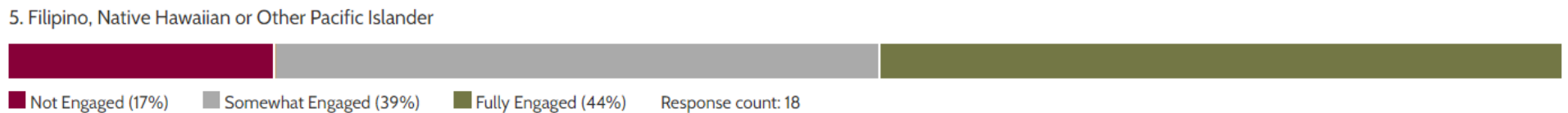
H. Prefer not to say







# Engagement Levels by Race/Ethnicity (1 of 2)

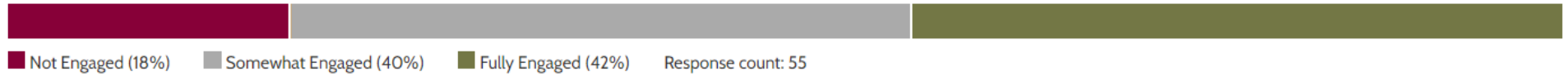


No respondents selected "1. American Indian or Alaska Native."



# Engagement Levels by Race/Ethnicity (2 of 2)

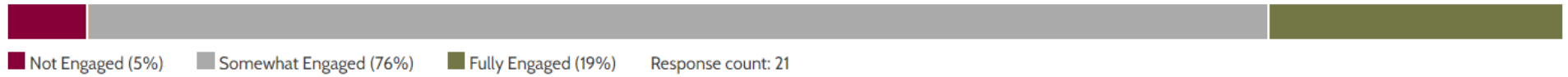
6. White



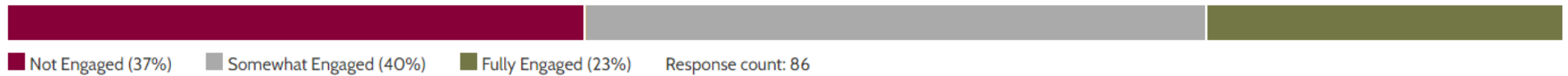
7. Some other race, ethnicity, or origin

Not Available - There are not 10 or more responses for this group.

8. Two or more races or ethnicities



9. Prefer not to say



# Engagement Levels by Tenure (1 of 2)

How long have you been with LACERA?

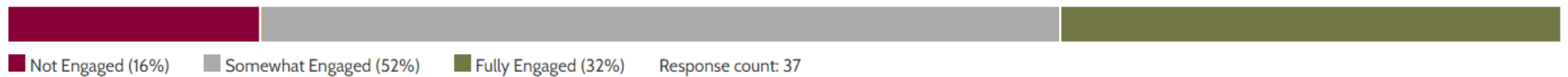
1. Less than 6 months

Not Available - There are not 10 or more responses for this group.

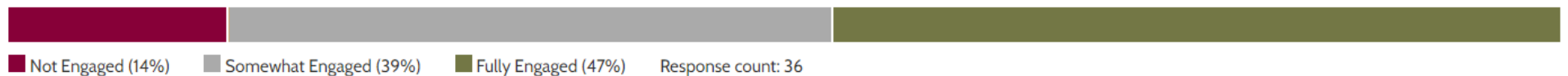
2. At least 6 months, but not more than 1 year

Not Available - There are not 10 or more responses for this group.

3. At least 1 year, but not more than 3 years



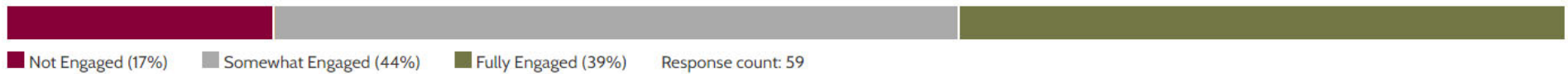
4. At least 3 years, but not more than 5 years



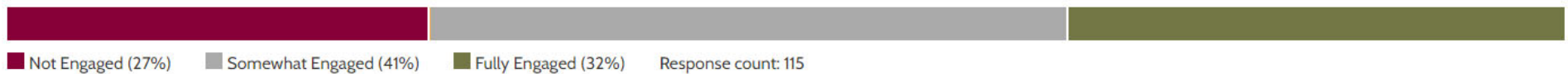
# Engagement Levels by Tenure (2 of 2)

How long have you been with LACERA?

5. At least 5 years, but not more than 10 years



6. At least 10 years, but not more than 20 years



7. 20 years or more



8. Prefer not to say





# Engagement Levels by Role

1. Staff Member: You do not supervise other Staff Members



■ Not Engaged (19%) ■ Somewhat Engaged (44%) ■ Fully Engaged (36%) Response count: 232

2. Supervisor: You are a supervisor who may be responsible for one or more of the following: giving direction on work projects, performance reviews, and leave approval



■ Not Engaged (15%) ■ Somewhat Engaged (57%) ■ Fully Engaged (28%) Response count: 39

3. Assistant Manager or Section Head: You may supervise one or more supervisors and be responsible for day to day operations



■ Not Engaged (29%) ■ Somewhat Engaged (14%) ■ Fully Engaged (57%) Response count: 14

4. Senior Leader: You are the Division Manager or a member of the Executive team

Not Available - There are not 10 or more responses for this group.

5. Prefer not to say



■ Not Engaged (36%) ■ Somewhat Engaged (42%) ■ Fully Engaged (22%) Response count: 55

# Contact Information

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Bob Lavigna  
Director, Institute for Public Sector Employee Engagement  
[rlavigna@cpshr.us](mailto:rlavigna@cpshr.us)

CPS HR  CONSULTING™

**FOR INFORMATION ONLY**

May 24, 2021

TO: Each Trustee  
Board of Retirement  
Board of Investments

FROM: Barry W. Lew   
Legislative Affairs Officer

FOR: June 2, 2021 Board of Retirement Meeting  
June 9, 2021 Board of Investments Meeting

SUBJECT: **Monthly Status Report on Legislation**

Attached is the monthly report on the status of legislation that staff is monitoring or on which LACERA has adopted a position.

**Reviewed and Approved:**



---

**Steven P. Rice, Chief Counsel**

**Attachments**

LACERA Legislative Report Index  
LACERA Legislative Report

cc: Santos H. Kreimann  
JJ Popowich  
Steven P. Rice  
Jon Grabel  
Tony Roda, Williams & Jensen  
Joe Ackler, Ackler & Associates

<b>PUBLIC RETIREMENT</b>	<b>AUTHOR</b>	<b>TITLE</b>	<b>PAGE</b>
AB 551.....	Rodriguez (D).....	Teachers' Retirement System: Individual Plans.....	1
AB 627.....	Waldron (R).....	Recognition of Tribal Court Orders: Retirement Plans.....	1
AB 1133.....	Chen (R).....	State Employee Hybrid Pension System.....	1
AB 1293.....	Cooley (D).....	Federal Law Limits: Adjustments.....	1
SB 278.....	Leyva (D).....	PERS: Disallowed Compensation: Benefit Adjustments.....	2
SB 294.....	Leyva (D).....	Public Retirement: Leave of Absence: Service Credit.....	2
SB 634.....	Labor, Public Employment & Retirement Cmt.....	Public Employees' Retirement.....	2
HR 2954.....	Neal (D).....	Strong Retirement.....	2
<b>PUBLIC INVESTMENT</b>			
AB 539.....	Cooley (D).....	State Teachers' Retirement: Investment Managers.....	3
AB 890.....	Cervantes (D).....	Public Employee Retirement Systems: Investment.....	3
AB 1019.....	Holden (D).....	Public Employee Retirement Systems: Investments.....	3
SB 457.....	Portantino (D).....	Public Employee Retirement Systems: Investments.....	3
<b>RETIREMENT PERSONNEL</b>			
AB 761.....	Chen (R).....	County Employees' Retirement: Personnel: Orange County.....	4
<b>PUBLIC EMPLOYMENT</b>			
AB 17.....	Cooper (D).....	Peace Officers: Disqualification from Employment.....	4
AB 444.....	Public Employment and Retirement Cmt.....	State and Local Employees: Pay Warrants: Designees.....	4
AB 1354.....	Grayson (D).....	Public Employees' Retirement.....	5
AB 1460.....	Bigelow (R).....	State Employment: COVID-19 Telework: Costs.....	5
SB 411.....	Cortese (D).....	Public Employees' Retirement System.....	5
<b>DISABILITY RETIREMENT</b>			
AB 845.....	Rodriguez (D).....	Disability Retirement: COVID-19: Presumption.....	6
<b>WORKERS COMPENSATION</b>			
AB 334.....	Mullin (D).....	Workers Compensation: Skin Cancer.....	6
AB 415.....	Rivas R (D).....	Employment: Workers' Compensation.....	6
AB 772.....	Ramos (D).....	Workers' Compensation: Medical Treatment.....	7
AB 872.....	Wood (D).....	Leave of Absence: Firefighters.....	7
AB 991.....	Ward (D).....	Workers' Compensation: Presumed Injuries.....	7
SB 213.....	Cortese (D).....	Workers' Compensation: Hospital Employees.....	7
SB 284.....	Stern (D).....	Workers' Compensation: Firefighters and Peace Officers.....	8
SB 335.....	Cortese (D).....	Workers' Compensation: Liability.....	8
SB 788.....	Bradford (D).....	Workers' Compensation: Risk Factors.....	8
<b>BROWN ACT</b>			
AB 339.....	Lee (D).....	Local Government: Open and Public Meetings.....	9
AB 361.....	Rivas R (D).....	Open Meetings: Local Agencies: Teleconferences.....	9
AB 703.....	Rubio (D).....	Open Meetings: Local Agencies: Teleconferences.....	9
SB 274.....	Wieckowski (D).....	Local Government Meetings: Agenda and Documents.....	10
<b>PUBLIC RECORDS ACT</b>			
AB 386.....	Cooper (D).....	Public Employees Retirement: Investments: Confidential.....	10
AB 473.....	Chau (D).....	California Public Records Act.....	10
AB 474.....	Chau (D).....	California Public Records Act: Conforming Revisions.....	10
<b>SOCIAL SECURITY</b>			
AJR 9.....	Cooper (D).....	Social Security.....	11
HR 82.....	Davis R (R).....	Government Pension Offset Repeal.....	11
HR 2337.....	Neal (D).....	Noncovered Employment.....	11
<b>HEALTHCARE</b>			
AB 1092.....	Mayes (R).....	Public Employees' Retirement: Health Benefits.....	12
AB 1400.....	Kalra (D).....	Guaranteed Health Care for All.....	12



LACERA Legislative Report  
2021-22 Legislative Session  
Status as of May 24, 2021

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**PUBLIC RETIREMENT**

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CA AB 551	<b>AUTHOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>DISPOSITION:</b> <b>SUMMARY:</b>	Rodriguez [D] Teachers' Retirement System: Individual Plans 02/10/2021 Pending Authorizes the State Teachers' Retirement System to administer an individual retirement plan as described in Section 408 of Title 26 of the United States Code. Eliminates the requirement that the administration of these plans be for the purpose of accepting a rollover from an annuity contract or custodial account offered by the system.
	<b>STATUS:</b>	05/06/2021 In ASSEMBLY. Read second time. To third reading.
CA AB 627	<b>AUTHOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>DISPOSITION:</b> <b>SUMMARY:</b>	Waldron [R] Recognition of Tribal Court Orders: Retirement Plans 02/12/2021 Pending Establishes a procedure pursuant to which one or both of the parties to a tribal court proceeding may file an application for recognition of a tribal court order that establishes a right to child support, spousal support payments, or marital property rights to a spouse, former spouse, child, or other dependent of a participant in a retirement plan or other plan of deferred compensation, and that assigns all or a portion of the benefits payable with respect to the plan participant to an alternate payee.
	<b>STATUS:</b>	05/12/2021 To SENATE Committee on JUDICIARY.
CA AB 1133	<b>AUTHOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>DISPOSITION:</b> <b>SUMMARY:</b>	Chen [R] State Employee Hybrid Pension System 02/18/2021 Pending States the intent of the Legislature to enact legislation that would create a hybrid retirement benefit, consisting of a defined benefit pension and a defined contribution program, within the Public Employees' Retirement System, that state employees would have the option of electing.
	<b>STATUS:</b>	02/18/2021 INTRODUCED.
CA AB 1293	<b>AUTHOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>LAST AMEND:</b> <b>DISPOSITION:</b> <b>SUMMARY:</b>	Cooley [D] Federal Law Limits: Adjustments 02/19/2021 04/13/2021 Pending Prohibits the amount payable to a member under the Judges' Retirement System II, including specified adjustments, from exceeding the limits established by federal law, and would incorporate specified provisions of federal law by reference.

**STATUS:**  
05/13/2021 In ASSEMBLY. Read third time. Passed ASSEMBLY.  
\*\*\*\*\*To SENATE. (75-0)

CA SB 278 **AUTHOR:** Leyva [D]  
**TITLE:** PERS: Disallowed Compensation: Benefit Adjustments  
**INTRODUCED:** 01/29/2021  
**LAST AMEND:** 03/23/2021  
**DISPOSITION:** Pending  
**SUMMARY:**  
Establishes new procedures under Public Employees' Retirement Law for cases in which Public Employees' Retirement System determines that the benefits of a member or annuitant are, or would be, based on disallowed compensation that conflicts with State Public Employees' Pension Reform Act of 2013 and other specified laws and thus impermissible under Public Employees' Retirement Law.

**STATUS:**  
05/20/2021 From SENATE Committee on APPROPRIATIONS: Do pass. (6-0)  
05/20/2021 In SENATE. Read second time. To third reading.

CA SB 294 **AUTHOR:** Leyva [D]  
**TITLE:** Public Retirement: Leave of Absence: Service Credit  
**INTRODUCED:** 02/02/2021  
**DISPOSITION:** Pending  
**SUMMARY:**  
Removes the 12-year limitation for service credit earned on an employer-approved compensated leave under the Public Employees Retirement Law and Teachers Retirement Law.

**STATUS:**  
05/13/2021 To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

CA SB 634 **AUTHOR:** Labor, Public Employment & Retirement Cmt  
**TITLE:** Public Employees' Retirement  
**INTRODUCED:** 02/19/2021  
**DISPOSITION:** Pending  
**SUMMARY:**  
Prohibits a member of the State Teachers' Retirement System (STRS) from purchasing service credit for any school year if the purchase would result in more than one year of service for that school year.

**STATUS:**  
05/13/2021 To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

**Comments:**  
This is an omnibus bill that covers technical amendments for CalPERS, CalSTRS, and CERL retirement systems.

US HR 2954 **SPONSOR:** Neal [D]  
**TITLE:** Strong Retirement  
**INTRODUCED:** 05/04/2021  
**DISPOSITION:** Pending  
**SUMMARY:**  
Secures a Strong Retirement Act of 2021.

**STATUS:**  
05/04/2021 INTRODUCED.  
05/04/2021 To HOUSE Committee on WAYS AND MEANS.  
05/04/2021 To HOUSE Committee on FINANCIAL SERVICES.  
05/04/2021 To HOUSE Committee on EDUCATION AND LABOR.

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**PUBLIC INVESTMENT**

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CA AB 539	<p><b>AUTHOR:</b> Cooley [D]  <b>TITLE:</b> State Teachers' Retirement: Investment Managers  <b>INTRODUCED:</b> 02/10/2021  <b>DISPOSITION:</b> Pending  <b>SUMMARY:</b>  Authorizes the Teachers' Retirement Board to contract with investment advisers upon the same finding by the Board and approval by the State Personnel Board. Authorizes the Board to establish a competitive bidding process and to specify the contract terms and conditions the Board solely deems necessary and prudent to contract with qualified investment managers and investment advisers.  <b>STATUS:</b>  05/19/2021 To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.</p>
CA AB 890	<p><b>AUTHOR:</b> Cervantes [D]  <b>TITLE:</b> Public Employee Retirement Systems: Investment  <b>INTRODUCED:</b> 02/17/2021  <b>LAST AMEND:</b> 05/24/2021  <b>DISPOSITION:</b> Pending  <b>SUMMARY:</b>  Requires the Board of Administration of the Public Employees' Retirement System and the Teachers' Retirement Board to provide reports to the Legislature on the status of achieving objectives and initiatives, to be defined by the boards, regarding participation of emerging managers or diverse managers responsible for asset management within each retirement system's portfolio of investments.  <b>STATUS:</b>  05/24/2021 In ASSEMBLY. Read second time and amended. To second reading.</p>
CA AB 1019	<p><b>AUTHOR:</b> Holden [D]  <b>TITLE:</b> Public Employee Retirement Systems: Investments  <b>INTRODUCED:</b> 02/18/2021  <b>DISPOSITION:</b> Pending  <b>SUMMARY:</b>  prohibit state trust moneys from being used to make additional or new investments or to renew existing investments in investment vehicles issued or owned by the government of Turkey, unless the government adopts a policy to acknowledge the Armenian Genocide and embark on a path of affording justice to its victims.  <b>STATUS:</b>  03/04/2021 To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.</p>
CA SB 457	<p><b>AUTHOR:</b> Portantino [D]</p>

**TITLE:** Public Employee Retirement Systems: Investments  
**INTRODUCED:** 02/16/2021  
**DISPOSITION:** Pending  
**SUMMARY:**

Requires the boards of administration of the Public Employees Retirement System and the State Teachers Retirement System to provide employers that are school districts and cities that participate in the systems an option to elect an investment portfolio that does not contain investment vehicles that are issued or owned by the government of the Republic of Turkey.

**STATUS:**  
05/20/2021 From SENATE Committee on APPROPRIATIONS: Do pass. (7-0)  
05/20/2021 In SENATE. Read second time. To third reading.

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**RETIREMENT PERSONNEL**

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CA AB 761 **AUTHOR:** Chen [R]  
**TITLE:** County Employees' Retirement: Personnel: Orange County  
**INTRODUCED:** 02/16/2021  
**LAST AMEND:** 03/18/2021  
**DISPOSITION:** Pending  
**SUMMARY:**  
Authorizes the board of retirement for Orange County to appoint an administrator, assistant administrators, a chief investment officer, subordinate investment officers, senior management employees, legal counsel, and other specified employees. Provides that the personnel appointed pursuant to these provisions would not be county employees subject to county civil service and merit system rules, and instead would be employees of the retirement system.  
**STATUS:**  
05/12/2021 To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

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**PUBLIC EMPLOYMENT**

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CA AB 17 **AUTHOR:** Cooper [D]  
**TITLE:** Peace Officers: Disqualification from Employment  
**INTRODUCED:** 12/07/2020  
**LAST AMEND:** 01/12/2021  
**DISPOSITION:** Pending  
**SUMMARY:**  
Disqualifies a person from being a peace officer if the person has been discharged from the military for committing an offense that would have been a felony if committed in the state or if the person has been certified as a peace officer and has had that certification revoked by the Commission on Peace Officer Standards and Training.  
**STATUS:**  
01/12/2021 From ASSEMBLY Committee on PUBLIC SAFETY with author's amendments.  
01/12/2021 In ASSEMBLY. Read second time and amended. Re-referred to Committee on PUBLIC SAFETY.

CA AB 444 **AUTHOR:** Public Employment and Retirement Cmt  
**TITLE:** State and Local Employees: Pay Warrants: Designees  
**INTRODUCED:** 02/08/2021  
**DISPOSITION:** Pending

**SUMMARY:**

Relates to State and local employees. Prescribes a process by which an appointing power would issue a check directly to a designated person instead of delivering employee warrants to that person. Provides that upon sufficient proof of the designee's identity, the appointing power must endorse and deposit the warrant issued to a deceased employee back into the Treasury to the credit of the fund or appropriation upon which it was drawn, then issue a revolving fund check to the designated person.

**STATUS:**

05/19/2021 To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

**Comments:**

The SACRS Legislative Committee is considering a similar proposal that would clarify that a deceased member's last pension check may be issued to a corporation, trust, or estate.

CA AB 1354

**AUTHOR:** Grayson [D]  
**TITLE:** Public Employees' Retirement  
**INTRODUCED:** 02/19/2021  
**DISPOSITION:** Pending

**SUMMARY:**

Makes nonsubstantive changes to provisions prohibiting a retired person from being employed by a public employer in the same public retirement system from which the retiree receives pension benefits without reinstatement from retirement into that system, subject to certain exceptions.

**STATUS:**

02/19/2021 INTRODUCED.

**Comments:**

This is a spot bill.

CA AB 1460

**AUTHOR:** Bigelow [R]  
**TITLE:** State Employment: COVID-19 Telework: Costs  
**INTRODUCED:** 02/19/2021  
**DISPOSITION:** Pending

**SUMMARY:**

Authorizes the Department of Human Resources (CalHR) to provide a one-time payment of an unspecified amount to employees who have been required to telework as a result of the COVID-19 pandemic in order to offset costs associated with working remotely.

**STATUS:**

03/11/2021 To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

CA SB 411

**AUTHOR:** Cortese [D]  
**TITLE:** Public Employees' Retirement System  
**INTRODUCED:** 02/12/2021  
**LAST AMEND:** 04/13/2021  
**DISPOSITION:** Pending

**SUMMARY:**

Eliminates the requirement that a person employed without reinstatement in a manner other than authorized by PERL be reinstated, instead providing that reinstatement is permissive. Makes conforming changes and makes specific reference to the duties of employees and employers regarding reinstatement

after retirement in violation of PEPRRA.

**STATUS:**

05/20/2021 To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

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**DISABILITY RETIREMENT**

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CA AB 845 **AUTHOR:** Rodriguez [D]  
**TITLE:** Disability Retirement: COVID-19: Presumption  
**INTRODUCED:** 02/17/2021  
**LAST AMEND:** 03/30/2021  
**DISPOSITION:** Pending  
**SUMMARY:**  
Creates a presumption, applicable to the retirement systems that PEPRRA regulates and to specified members in those systems, that would be applied to disability retirements on the basis, in whole or in part, of a Coronavirus disease 2019-related illness. Requires that it be presumed the disability arose out of, or in the course of, the member's employment.

**STATUS:**

05/19/2021 To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

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**WORKERS COMPENSATION**

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CA AB 334 **AUTHOR:** Mullin [D]  
**TITLE:** Workers Compensation: Skin Cancer  
**INTRODUCED:** 01/27/2021  
**DISPOSITION:** Pending  
**SUMMARY:**  
Relates to existing law which provides that skin cancer developing in active lifeguards, for purposes of workers' compensation, is presumed to arise out of and in the course of employment, unless the presumption is rebutted. Expands the scope of this provision to certain peace officers of the Department of Fish and Wildlife and the Department of Parks and Recreation.

**STATUS:**

05/20/2021 In ASSEMBLY. Read third time. Passed ASSEMBLY. \*\*\*\*\*To SENATE. (76-0)

CA AB 415 **AUTHOR:** Rivas R [D]  
**TITLE:** Employment: Workers' Compensation  
**INTRODUCED:** 02/03/2021  
**LAST AMEND:** 02/12/2021  
**DISPOSITION:** Pending  
**SUMMARY:**  
Relates to workers' compensation. Defines injury for certain public employees regularly exposed to active fires or health hazards directly resulting from firefighting operations to include cancer that develops or manifests during a period of exposure to a known carcinogen while in public employment. Establishes a presumption that the cancer arose out of, and in the course of, employment, unless the presumption is controverted by evidence.

**STATUS:**

02/12/2021 To ASSEMBLY Committee on INSURANCE.  
02/12/2021 From ASSEMBLY Committee on INSURANCE with author's amendments.  
02/12/2021 In ASSEMBLY. Read second time and amended.

Re-referred to Committee on INSURANCE.

CA AB 772

**AUTHOR:** Ramos [D]  
**TITLE:** Workers' Compensation: Medical Treatment  
**INTRODUCED:** 02/16/2021  
**LAST AMEND:** 03/25/2021  
**DISPOSITION:** Pending  
**SUMMARY:**

Clarifies that an employer is not limited in its ability to insure against an act of domestic terrorism or to provide benefits in excess of those required by existing law following an act of terrorism. Clarifies that when an employer approves a request for medical treatment from a treatment provider, without modification, the employer has completed utilization review under the law.

**STATUS:**

03/25/2021 To ASSEMBLY Committee on INSURANCE.  
03/25/2021 From ASSEMBLY Committee on INSURANCE with author's amendments.  
03/25/2021 In ASSEMBLY. Read second time and amended.  
Re-referred to Committee on INSURANCE.

CA AB 872

**AUTHOR:** Wood [D]  
**TITLE:** Leave of Absence: Firefighters  
**INTRODUCED:** 02/17/2021  
**DISPOSITION:** Pending  
**SUMMARY:**

Relates to Leave of absence for firefighters. Makes that benefit available to all rank-and-file and supervisory firefighters employed by the Department of Forestry and Fire Protection whose principal duties include active fire suppression or prevention services.

**STATUS:**

05/24/2021 In ASSEMBLY. Read second time. To third reading.

CA AB 991

**AUTHOR:** Ward [D]  
**TITLE:** Workers' Compensation: Presumed Injuries  
**INTRODUCED:** 02/18/2021  
**LAST AMEND:** 03/11/2021  
**DISPOSITION:** Pending  
**SUMMARY:**

Expands presumptions for hernia, pneumonia, heart trouble, cancer, tuberculosis, bloodborne infectious disease, methicillin-resistant Staphylococcus aureus skin infection, and meningitis-related illnesses and injuries to a lifeguard employed on a year-round, full-time basis by the City of San Diego.

**STATUS:**

03/11/2021 To ASSEMBLY Committee on INSURANCE.  
03/11/2021 From ASSEMBLY Committee on INSURANCE with author's amendments.  
03/11/2021 In ASSEMBLY. Read second time and amended.  
Re-referred to Committee on INSURANCE.

CA SB 213

**AUTHOR:** Cortese [D]  
**TITLE:** Workers' Compensation: Hospital Employees  
**INTRODUCED:** 01/12/2021  
**LAST AMEND:** 03/04/2021

**DISPOSITION:** Pending

**SUMMARY:**

Defines injury, for a hospital employee who provides direct patient care in an acute care hospital, to include infectious diseases, cancer, musculoskeletal injuries, post-traumatic stress disorder, and respiratory diseases. Creates a rebuttable presumption that these injuries that develop or manifest in a hospital employee who provides direct patient care in an acute care hospital arose out of and in the course of the employment. Includes COVID-19 in the definitions of infectious and respiratory diseases.

**STATUS:**

05/20/2021 From SENATE Committee on APPROPRIATIONS: Do pass. (5-2)

05/20/2021 In SENATE. Read second time. To third reading.

CA SB 284

**AUTHOR:** Stern [D]

**TITLE:** Workers' Compensation: Firefighters and Peace Officers

**INTRODUCED:** 02/01/2021

**LAST AMEND:** 03/16/2021

**DISPOSITION:** Pending

**SUMMARY:**

Relates to existing Law which provides that injury includes post-traumatic stress that develops during a period in which the injured person is in the service of the department or unit. Makes that provision applicable to active firefighting members of the State Department of State Hospitals, the State Department of Developmental Services, and the Military Department, and the Department of Veterans Affairs, including security officers of the Department of Justice when performing assigned duties.

**STATUS:**

05/20/2021 From SENATE Committee on APPROPRIATIONS: Do pass. (5-2)

05/20/2021 In SENATE. Read second time. To third reading.

CA SB 335

**AUTHOR:** Cortese [D]

**TITLE:** Workers' Compensation: Liability

**INTRODUCED:** 02/08/2021

**LAST AMEND:** 03/10/2021

**DISPOSITION:** Pending

**SUMMARY:**

Reduces the time periods after the date the claim form is filed with an employer in which the injury is presumed compensable and the presumption is rebuttable only by evidence discovered subsequent to the time period for certain injuries or illnesses, including hernia, heart trouble, pneumonia, or tuberculosis, among others, sustained in the course of employment of a specified member of law enforcement or a specified first responder.

**STATUS:**

05/20/2021 From SENATE Committee on APPROPRIATIONS: Do pass. (5-2)

05/20/2021 In SENATE. Read second time. To third reading.

CA SB 788

**AUTHOR:** Bradford [D]

**TITLE:** Workers' Compensation: Risk Factors

**INTRODUCED:** 02/19/2021

**DISPOSITION:** Pending



**SUMMARY:**

Prohibits consideration of race, religious creed, color, national origin, age, gender, marital status, sex, sexual identity, sexual orientation, or genetic characteristics to determine the approximate percentage of the permanent disability caused by other factors. Expresses the Legislature's intent to eliminate bias and discrimination in the workers' compensation system.

**STATUS:**

05/20/2021 From SENATE Committee on APPROPRIATIONS: Do pass.  
(6-0)  
05/20/2021 In SENATE. Read second time. To third reading.

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**BROWN ACT**

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CA AB 339

**AUTHOR:** Lee [D]  
**TITLE:** Local Government: Open and Public Meetings  
**INTRODUCED:** 01/28/2021  
**LAST AMEND:** 05/04/2021  
**DISPOSITION:** Pending  
**SUMMARY:**

Requires all open and public meetings of a city council or a county board of supervisors that governs a jurisdiction containing least 250,000 people to include an opportunity for members of the public to attend via a telephonic option or an internet-based service option.

**STATUS:**

05/20/2021 In ASSEMBLY. Read second time. To third reading.

CA AB 361

**AUTHOR:** Rivas R [D]  
**TITLE:** Open Meetings: Local Agencies: Teleconferences  
**INTRODUCED:** 02/01/2021  
**LAST AMEND:** 05/10/2021  
**DISPOSITION:** Pending  
**SUMMARY:**

Authorizes a local agency to use teleconferencing without complying with the teleconferencing requirements imposed by the Ralph M. Brown Act when a legislative body of a local agency holds a meeting for the purpose of declaring or ratifying a local emergency, during a declared state of emergency or local emergency, when state or local health officials have imposed or recommended measures to promote social distancing, and during a declared local emergency, provided certain requirements are met.

**STATUS:**

05/17/2021 In ASSEMBLY. Read third time. Passed ASSEMBLY.  
\*\*\*\*\*To SENATE. (62-4)

CA AB 703

**AUTHOR:** Rubio [D]  
**TITLE:** Open Meetings: Local Agencies: Teleconferences  
**INTRODUCED:** 02/12/2021  
**LAST AMEND:** 04/29/2021  
**DISPOSITION:** Pending  
**SUMMARY:**

Removes the requirements of the Ralph M. Brown Act particular to teleconferencing and allows for teleconferencing subject to existing provisions regarding the posting of notice of an agenda and the ability of the public to observe the meeting and provide public comment.

**STATUS:**

04/29/2021 From ASSEMBLY Committee on LOCAL GOVERNMENT with author's amendments.  
04/29/2021 In ASSEMBLY. Read second time and amended.  
Re-referred to Committee on LOCAL GOVERNMENT.

**Comments:**

According to SACRS lobbyists, this will be a two-year bill and not taken up in 2021.

CA SB 274

**AUTHOR:** Wieckowski [D]  
**TITLE:** Local Government Meetings: Agenda and Documents  
**INTRODUCED:** 01/29/2021  
**LAST AMEND:** 04/05/2021  
**DISPOSITION:** Pending  
**SUMMARY:**

Requires a local agency with an internet website, or its designee, to email a copy of, or website link to, the agenda or a copy of all the documents constituting the agenda packet if the person requests that the items be delivered by email. Requires the legislative body or its designee to send by mail a copy of the agenda or a website link to the agenda and to email a copy of all other documents constituting the agenda packet, if specified criteria or circumstances are met.

**STATUS:**

05/13/2021 To ASSEMBLY Committee on LOCAL GOVERNMENT.

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**PUBLIC RECORDS ACT**

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CA AB 386

**AUTHOR:** Cooper [D]  
**TITLE:** Public Employees Retirement: Investments: Confidential  
**INTRODUCED:** 02/02/2021  
**LAST AMEND:** 04/28/2021  
**DISPOSITION:** Pending  
**SUMMARY:**

Exempts from disclosure under the California Public Records Act specified records regarding an internally managed private loan made directly by the Public Employees' Retirement Fund. Provides that these records would include quarterly and annual financial statements of the borrower or its constituent owners, unless the information has already been publicly released by the keeper of the information. Prescribes specified exceptions to this exemption from disclosure.

**STATUS:**

05/13/2021 In ASSEMBLY. Read second time. To third reading.

CA AB 473

**AUTHOR:** Chau [D]  
**TITLE:** California Public Records Act  
**INTRODUCED:** 02/08/2021  
**DISPOSITION:** Pending  
**SUMMARY:**

Recodifies and reorganizes the provisions of the California Public Records Act. The bill would include provisions to govern the effect of recodification and states that the bill is intended to be entirely nonsubstantive in effect.

**STATUS:**

05/24/2021 In ASSEMBLY. Read second time. To third reading.

CA AB 474

**AUTHOR:** Chau [D]

**TITLE:** California Public Records Act: Conforming Revisions  
**INTRODUCED:** 02/08/2021  
**DISPOSITION:** Pending  
**SUMMARY:**

Enacts various conforming and technical changes related to another bill that recodifies and reorganizes the California Public Records Act. The bill would only become operative if the related bill recodifying the act is enacted and becomes operative on January 1, 2023.

**STATUS:**  
05/24/2021 In ASSEMBLY. Read second time. To third reading.

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### SOCIAL SECURITY

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CA AJR 9 **AUTHOR:** Cooper [D]  
**TITLE:** Social Security  
**INTRODUCED:** 03/01/2021  
**DISPOSITION:** Pending  
**SUMMARY:**  
Requests the Congress of the United States to enact, and the President to sign, legislation that would repeal the Government Pension Offset and the Windfall Elimination Provision from the Social Security Act.  
**STATUS:**  
04/19/2021 In ASSEMBLY. Ordered to third reading.  
**BOR\_Position:** Support 05/05/2021  
**IBLC\_Recommendation:** Support 04/15/2021  
**Staff\_Recommendation:** Support

US HR 82 **SPONSOR:** Davis R [R]  
**TITLE:** Government Pension Offset Repeal  
**INTRODUCED:** 01/04/2021  
**DISPOSITION:** Pending  
**SUMMARY:**  
Amends the Social Security Act; repeals the Government pension offset and windfall elimination provisions.  
**STATUS:**  
01/04/2021 INTRODUCED.  
01/04/2021 To HOUSE Committee on WAYS AND MEANS.  
**BOR\_Position:** Support 05/05/2021  
**IBLC\_Recommendation:** Support 04/15/2021  
**Staff\_Recommendation:** Support

US HR 2337 **SPONSOR:** Neal [D]  
**TITLE:** Noncovered Employment  
**INTRODUCED:** 04/01/2021  
**DISPOSITION:** Pending  
**SUMMARY:**  
Amends Title II of the Social Security Act to provide an equitable Social Security formula for individuals with noncovered employment and to provide relief for individuals currently affected by the Windfall Elimination Provision.  
**STATUS:**  
04/01/2021 INTRODUCED.  
04/01/2021 To HOUSE Committee on WAYS AND MEANS.

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### HEALTHCARE

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CA AB 1092

**AUTHOR:** Mayes [R]  
**TITLE:** Public Employees' Retirement: Health Benefits  
**INTRODUCED:** 02/18/2021  
**LAST AMEND:** 04/26/2021  
**DISPOSITION:** Pending  
**SUMMARY:**

Precludes a person who has retired under PERS and who obtains work with a subsequent employer from receiving any health benefits offered under PEMHCA if the person's subsequent employer offers health care coverage that provides reasonably comparable benefits. Prohibits, among other things, employees, annuitants, and family members who become eligible to enroll on or after a specified date in Part A and Part B of Medicare from being enrolled in a basic health benefit plan.

**STATUS:**

04/26/2021 From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT With author's amendments.  
04/26/2021 In ASSEMBLY. Read second time and amended. Re-referred to Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

CA AB 1400

**AUTHOR:** Kalra [D]  
**TITLE:** Guaranteed Health Care for All  
**INTRODUCED:** 02/19/2021  
**DISPOSITION:** Pending  
**SUMMARY:**

Creates the Guaranteed Health Care for All Program, or CalCare, to provide comprehensive universal single-payer health care coverage and a health care cost control system for the benefit of all residents of the state. Provides that CalCare cover a wide range of medical benefits and other services and would incorporate the health care benefits and standards of other existing federal and state provisions. Creates the CalCare Board to govern CalCare, made up of 9 voting members.

**STATUS:**

02/19/2021 INTRODUCED.

**FOR INFORMATION ONLY**

May 19, 2021

TO: Each Trustee  
Board of Retirement

FROM: Barry W. Lew   
Legislative Affairs Officer

FOR: June 2, 2021 Board of Retirement Meeting

SUBJECT: **Update on SACRS 2021 Legislative Platform**

During its Business Meeting at the State Association of County Retirement Systems' (SACRS) Spring Conference on May 14, 2021, the SACRS membership voted on whether SACRS should sponsor SB 634.

*SB 634 Omnibus Bill*

SB 634 is an omnibus bill for noncontroversial, technical, and clarifying amendments to the County Employees Retirement Law of 1937 (CERL) that have been developed by the SACRS Legislative Committee. The following items in the bill pertain to the CERL retirement systems:

- Clarifies authority for a retirement board to procure the services of a medical advisor.
- Deletes obsolete section regarding installment payments for service credit purchases.
- Updates incorrect cross-references and missing words in various sections to enhance readability.

The SACRS membership by voice vote approved sponsorship of SB 634.

*Pending Proposals for 2022 Legislative Year*

The SACRS Legislative Committee continues to develop further proposals for the 2022 legislative year. During the Administrators Breakout Session at the SACRS Conference,

a list of pending proposals was circulated for comments and feedback. The Legislative Committee expects these proposals to be considered for sponsorship by the SACRS membership at the Fall 2021 Conference.

**Reviewed and Approved:**



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**Johanna Fontenot, Senior Staff Counsel**

**Attachment**

SB 634 (Committee on Labor, Public Employment and Retirement) as introduced on February 19, 2021

cc: Santos H. Kreimann  
JJ Popowich  
Steven P. Rice  
Johanna Fontenot  
Frank Boyd  
Ricki Contreras  
Vincent Lim  
Joe Ackler, Ackler & Associates

**Introduced by Committee on Labor, Public Employment and Retirement (Senators Cortese (Chair), Durazo, Laird, Newman, and Ochoa Bogh)**

February 19, 2021

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An act to amend Sections 22011, 22802, 24204, and 26804 of the Education Code, and to amend Sections 20320, 20322, 20324, 31530, 31565.5, 31680.2, 31680.3, 31732, and 31781.2 of, to add Section 21499.1 to, and to repeal Section 31641.8 of, the Government Code, relating to retirement.

LEGISLATIVE COUNSEL'S DIGEST

SB 634, as introduced, Committee on Labor, Public Employment and Retirement. Public employees' retirement.

(1) Existing law, the Teachers' Retirement Law, establishes the State Teachers' Retirement System (STRS) and creates the Defined Benefit Program of the State Teachers' Retirement Plan, which provides a defined benefit to members of the program, based on final compensation, credited service, and age at retirement, subject to certain variations. STRS is administrated by the Teachers' Retirement Board. Existing law requires STRS to pay premiums associated with Medicare Part A for certain retired or disabled members, as specified. Existing law creates the Cash Balance Benefit Program, which is administered by the board, to provide a retirement plan for the benefit of participating employees who provide creditable service for less than 50% of full time.

Existing law applicable to the Defined Benefit Program, for applications and documents requiring a signature, requires that the signature be in a form prescribed by the system.

This bill would apply the above-described requirements regarding signed applications and documents to the Cash Balance Benefit Program and the requirement that STRS pay certain Medicare Part A premiums.

Existing law authorizes a member of STRS who is not retired and who was previously excluded from membership in the Defined Benefit Program request to purchase service credit in the program for certain types of other service. The bill would delete and obsolete cross-reference.

This bill would prohibit a member from purchasing service credit for any school year if the purchase would result in more than one year of service for that school year.

Existing law authorizes a member of STRS who files an application for service retirement to change or cancel their retirement application if specified requirements are met. In this regard, existing law requires a member to return the total gross distribution amount of all payments for any canceled retirement benefit, including a lump-sum payment, as specified.

This bill would extend the requirement to return total gross distribution amount, as described above, to apply to any canceled benefit.

(2) The Public Employees' Retirement Law (PERL) creates the Public Employees' Retirement System (PERS), which is administered by the Board of Administration of the Public Employees' Retirement System. PERL excludes specified appointees, elective officers, and legislative employees from membership in the system unless the person to whom these provisions apply elects to file with the board an election in writing to become a member.

This bill would prescribe the circumstances pursuant to which the start date would be determined for an appointee, elective officer, or legislative employee who elects to become a member of PERS. If the written election is received by the system within 90 days of the applicable appointment, current term, or start date for the position, the bill would require that the effective date be the start date of the appointment, the start date of the term, or the start date of the position. If the election is not received by the system within 90 days, as specified, the effective date would be the first day of the month in which the election is received by the system.

PERL prescribes the circumstances pursuant to which specified payments and benefits may be paid by PERS in connection with the death of a member, among others.



This bill would require that overpayments, issued after the date of death to a member, retired member, or beneficiary, made to or on behalf of any member, retired member, or beneficiary, as specified, be deducted from any subsequent payment or benefit that is payable by PERS as a result of the death.

(3) The County Employees Retirement Law of 1937 (CERL) authorizes counties to establish retirement systems pursuant to its provisions for the purpose of providing pension, disability, and death benefits to county and district employees. CERL vests management of the retirement systems created pursuant to its provisions in a board of retirement. CERL requires the county health officer to advise the board on medical matters and, if requested, attend its meetings.

This bill would authorize a county health officer's duly authorized representative to also advise the board of retirement with advice on medical matters.

CERL authorizes a member of a system established under its provision who ceases to be an employee of the county under certain provisions of the Education Code to elect to remain a member of the CERL system.

This bill would correct an obsolete cross-reference in this regard.

CERL provides benefits based upon service credit, defines service for this purpose, and authorizes a member to elect to receive service credit for other forms of public service, as defined, by making contributions. CERL authorizes a member who has elected to make contributions to receive service credit to complete payment, at any time prior to the effective date of the member's retirement, by a lump sum.

This bill would repeal the above-described authority of a member to complete a payment by lump sum.

CERL requires a board of retirement to secure medical, investigatory, and other service and advice as is necessary for the purpose of administering provisions relating to disability retirement.

This bill would authorize the board to contract with a physician in private practice for the medical advice necessary to carry out the purpose of provisions relating to disability retirement.

This bill would make various technical and stylistic changes.

Vote: majority. Appropriation: no. Fiscal committee: yes.  
State-mandated local program: no.

*The people of the State of California do enact as follows:*

1 SECTION 1. Section 22011 of the Education Code is amended  
2 to read:

3 22011. For an application or document requiring a signature,  
4 that signature shall be in a form prescribed by the system,  
5 including, but not limited to, on paper or made by electronic means.  
6 Notwithstanding any other law, an application or document made  
7 under this ~~part part~~, *Part 13.5 (commencing with Section 25900)*,  
8 *or Part 14 (commencing with Section 26000)* that is signed and  
9 submitted by the person authorized to do so using technology and  
10 security measures prescribed by the system shall be deemed to be  
11 a signed and valid original document.

12 SEC. 2. Section 22802 of the Education Code is amended to  
13 read:

14 22802. (a) A member, other than a retired member, who was  
15 previously excluded from membership in the Defined Benefit  
16 Program may request to purchase service credit for:

17 (1) Service as a substitute excluded under Section 22602.

18 (2) Creditable service subject to coverage under the Cash  
19 Balance Benefit ~~Program, excluding service credited pursuant to~~  
20 ~~Section 26402, Program~~ if the member is currently contributing  
21 to the Defined Benefit Program and has terminated all service  
22 subject to coverage under the Cash Balance Benefit Program. Upon  
23 requesting to purchase service credit under this paragraph, the  
24 member shall cease to be eligible for a benefit for the same service  
25 or time previously credited under the Cash Balance Benefit  
26 Program pursuant to Part 14 (commencing with Section 26000).

27 (3) Service performed on a part-time basis excluded under  
28 Section 22601.5 or Section 22604, other than service credited  
29 under paragraph (2).

30 (4) Adult education service excluded under Section 22603, as  
31 it read on December 31, 1995.

32 (5) Service as a school nurse excluded under Section 22606, as  
33 it read on December 31, 1995.

34 (6) Service performed in a position prior to the date the position  
35 was made subject to coverage under the Defined Benefit Program.

36 (7) Service subject to coverage under the Defined Benefit  
37 Program performed while a member of another California public  
38 retirement system, provided the member has ceased to be a member

1 of, and has ceased to be entitled to benefits from, the other  
2 retirement system. The member shall not receive credit for the  
3 service if the member may redeposit withdrawn contributions and  
4 subsequently be eligible for any benefits based upon the same  
5 service or based upon other full-time service performed during the  
6 same period, from another California public retirement system.

7 (b) A member who requests to purchase service credit under  
8 this part for service performed while excluded from membership  
9 under the Defined Benefit Program shall pay all of the required  
10 contributions for all or the portion of that service for which the  
11 member requests to purchase service credit.

12 (c) A member ~~may~~ shall not request to purchase service credit  
13 for service or time described in paragraphs (1) and (3) to (7),  
14 inclusive, of subdivision (a) if, after the request, the member would  
15 continue to receive credit for the same service or time in the Cash  
16 Balance Benefit Program under Part 14 (commencing with Section  
17 26000) or another public retirement system.

18 (d) *A member shall not purchase service credit for any school*  
19 *year if the purchase would result in more than one year of service*  
20 *for that school year.*

21 SEC. 3. Section 24204 of the Education Code is amended to  
22 read:

23 24204. (a) A service retirement allowance under this part shall  
24 become effective upon any date designated by the member,  
25 provided all of the following conditions are met:

26 (1) An application for service retirement allowance is filed on  
27 a form provided by the system, which is executed no earlier than  
28 six months before the effective date of retirement allowance.

29 (2) The effective date is later than the last day the member  
30 earned creditable compensation pursuant to Section 22119.2 or  
31 22119.3.

32 (3) The effective date is no earlier than one day after the date  
33 on which the retirement allowance was terminated under Section  
34 24208.

35 (4) The effective date is no earlier than one year following the  
36 date on which the retirement allowance was terminated under  
37 subdivision (a) of Section 24117.

38 (5) The effective date is no earlier than the date upon and  
39 continuously after which the member is determined to the  
40 satisfaction of the board to have been mentally incompetent.

1 (6) The effective date is no earlier than one day after the date  
2 upon which the member completes payment of a service credit  
3 purchase pursuant to Section 22801, 22820, or 22826, or payment  
4 of a redeposit of contributions pursuant to Section 23200, except  
5 as provided in Section 22801 or 22829.

6 (b) A member who files an application for service retirement  
7 may change or cancel their retirement application if all of the  
8 following are met:

9 (1) The form provided by the system is received in the system's  
10 headquarters office no later than 30 days from the date the  
11 member's initial benefit payment for the member's most recent  
12 retirement under the Defined Benefit Program is paid by the  
13 system.

14 (2) The member returns the total gross distribution amount of  
15 all payments for any canceled ~~retirement~~ benefit, including a  
16 lump-sum payment being changed to an annuity, to the system's  
17 headquarters office no later than 45 days from the date of the  
18 member's initial benefit payment. The member shall be liable for  
19 any adverse tax consequences that may result from these actions.

20 (c) The retirement date of a member who files an application  
21 for retirement pursuant to Section 24201 on or after January 1,  
22 2012, shall be no earlier than January 1, 2012.

23 (d) Nothing in this section shall be construed to allow a member  
24 to receive more than one type of retirement or disability allowance  
25 for the same period of time by virtue of the member's own  
26 membership.

27 SEC. 4. Section 26804 of the Education Code is amended to  
28 read:

29 26804. Application for a retirement benefit under this part shall  
30 be made on a form prescribed by the system. A participant who  
31 files an application for a retirement benefit may change or cancel  
32 the retirement application if all of the following are met:

33 (a) The form provided by the system is received in the system's  
34 headquarters office no later than 30 days from the date of the  
35 ~~member's~~ *participant's* initial benefit payment.

36 (b) The participant returns the total gross distribution amount  
37 *of all payments* for any canceled retirement benefit, including a  
38 lump-sum payment being changed to an annuity, to the system's  
39 headquarters office no later than 45 days from the date of the  
40 ~~participants's~~ *participant's* initial benefit payment. The participant

1 shall be liable for any adverse tax consequences that may result  
2 from these actions.

3 SEC. 5. Section 20320 of the Government Code is amended  
4 to read:

5 20320. (a) A person directly appointed by the Governor,  
6 without the nomination of any officer or board, or directly  
7 appointed by the Attorney General, Lieutenant Governor,  
8 Controller, Secretary of State, Treasurer, or Superintendent of  
9 Public Instruction exempt from civil service under Article VII of  
10 the California Constitution, except those appointed pursuant to  
11 subdivision (i) of Section 4 thereof, is excluded from membership  
12 in this system unless ~~he or she~~ *the person* files with the board an  
13 election in writing to become a member. *The election effective*  
14 *date shall be the start date of the current appointment, provided*  
15 *the election is received by this system within 90 days of the*  
16 *applicable start date. If the election is not received by this system*  
17 *within 90 days from the start date, the effective date shall be the*  
18 *first day of the month in which the election is received by this*  
19 *system.*

20 (b) Upon electing to become a member, the person may further  
21 elect at any time prior to retirement to receive service credit for  
22 ~~his or her~~ *their* prior, excluded state service by making the  
23 contributions as specified in Sections 21050 and 21051.

24 SEC. 6. Section 20322 of the Government Code is amended  
25 to read:

26 20322. (a) An elective officer is excluded from membership  
27 in this system unless the officer files with the board an election in  
28 writing to become a member. *The election effective date shall be*  
29 *the start date of the current term, provided the election is received*  
30 *by this system within 90 days of the applicable start date. If the*  
31 *election is not received by this system within 90 days from the start*  
32 *date, the effective date shall be the first day of the month in which*  
33 *the election is received by this system.* Upon electing to become a  
34 member, the officer may further elect at any time prior to retirement  
35 to receive service credit for ~~his or her~~ *their* prior, excluded service  
36 by making the contributions as specified in Sections 21050 and  
37 21051.

38 (b) As used in this part, “elective officer” includes any officer  
39 of the Senate or Assembly who is elected by vote of the members  
40 of either or both of the houses of the Legislature, and any

1 appointive officer of a city or county occupying a fixed term of  
2 office, as well as officers of the state or contracting agencies elected  
3 by the people, and persons elected to a city council or a county  
4 board of supervisors.

5 (c) Notwithstanding any other provision of subdivision (a) or  
6 (b), elected or appointed officers of a county superintendent of  
7 schools, school district, or community college district, or of a  
8 contracting agency, who serve on public commissions, boards,  
9 councils, or similar legislative or administrative bodies are  
10 excluded from membership in this system. This exclusion shall  
11 only apply to those elected or appointed officers, other than city  
12 or county officers, who are first elected or appointed to an office  
13 on or after July 1, 1994, or who are elected or appointed to a term  
14 of office not consecutive with the term of office held on June 30,  
15 1994. For city or county elected or appointed officers, this  
16 exclusion shall only apply to those officers who are first elected  
17 or appointed to an office on or after January 1, 1997, or who are  
18 elected or appointed to a term of office not consecutive with the  
19 term of office held on December 31, 1996. This exclusion shall  
20 not apply to persons elected to a city council or county board of  
21 supervisors.

22 (d) Any person holding the office of city attorney or the office  
23 of assistant city attorney, whether employed, appointed, or elected,  
24 is excluded from the definition of "elective officer" as defined in  
25 subdivision (b). This subdivision shall apply only to persons first  
26 employed, elected, or appointed on or after July 1, 1994, or  
27 following any break in state service while serving in the office if  
28 the office was held on June 30, 1994.

29 (e) In accordance with Section 20125, the board shall be the  
30 sole judge of which elected or appointed positions qualify the  
31 incumbent as an "elective officer" in this system under this section.

32 (f) Notwithstanding any other provision of law, with respect to  
33 elective officers of contracting agencies, payment by a contracting  
34 agency of employer contributions and any other amounts for  
35 employer paid benefits under this system shall not be construed  
36 as receipt of salary or compensation by the elective officer for  
37 purposes of any statutory salary or compensation limitation.

38 SEC. 7. Section 20324 of the Government Code is amended  
39 to read:

1 20324. (a) An employee of the Senate or the Assembly, or the  
2 respective committees thereof, whose salaries or wages are paid  
3 from the Senate Operating Fund or the Assembly Operating Fund  
4 or the Operating Funds of the Assembly and Senate, shall be  
5 deemed a “legislative employee.” A legislative employee is  
6 excluded from membership in this system unless ~~he or she~~ *the*  
7 *person* files with the board an election in writing to become a  
8 member. *The election effective date shall be the start date of the*  
9 *current position, provided the election is received by this system*  
10 *within 90 days of the applicable start date. If the election is not*  
11 *received by this system within 90 days from the start date, the*  
12 *effective date shall be the first day of the month in which the*  
13 *election is received by this system.* The election shall not be  
14 required of a legislative employee who was a member of this  
15 system on October 1, 1963.

16 (b) Upon electing to become a member, a legislative employee  
17 may further elect at any time prior to retirement to receive service  
18 credit for ~~his or her~~ *their* prior, excluded legislative service and  
19 ~~he or she~~ *the legislative employee* shall have the option as to how  
20 much of that prior legislative service is to be credited. The  
21 legislative employee shall make contributions to this system as  
22 specified in Sections 21050 and 21051 for the previous service as  
23 a legislative employee for which ~~he or she~~ *desires they desire* to  
24 receive service credit.

25 SEC. 8. Section 21499.1 is added to the Government Code, to  
26 read:

27 21499.1. Any overpayment, issued after the date of death to a  
28 member, retired member, or beneficiary, made to or on behalf of  
29 any member, retired member, or beneficiary, including, but not  
30 limited to, contributions, interest, retirement allowance, payments  
31 of any kind, or federal or state tax, shall be deducted from any  
32 subsequent payment or benefit that is payable by this system as a  
33 result of the death.

34 SEC. 9. Section 31530 of the Government Code is amended  
35 to read:

36 31530. The county health ~~officer~~ *officer, either directly or*  
37 *through a duly authorized representative*, shall advise the board  
38 on medical matters and, if requested by the board, shall attend its  
39 meetings.

1 SEC. 10. Section 31565.5 of the Government Code is amended  
2 to read:

3 31565.5. Any member of a system established under this  
4 chapter who ceases to be an employee of the county under the  
5 provisions of ~~Education Code Section 873~~ *Section 1312 of the*  
6 *Education Code* may elect as authorized in ~~Education Code Section~~  
7 ~~873.1~~ *Section 1313 of the Education Code* to remain a member of  
8 such system.

9 SEC. 11. Section 31641.8 of the Government Code is repealed.

10 ~~31641.8. Any member who has elected to make contributions~~  
11 ~~pursuant to this chapter by installment payments may, at any time~~  
12 ~~prior to the effective date of his retirement, complete payment~~  
13 ~~thereof by lump sum.~~

14 SEC. 12. Section 31680.2 of the Government Code is amended  
15 to read:

16 31680.2. (a) Any person who has retired may be employed in  
17 a position requiring special skills or knowledge, as determined by  
18 the county or district employing ~~him or her, for them,~~ *for a period*  
19 *of time* not to exceed 90 working days or 720 hours, whichever is  
20 greater, in any one fiscal year or any other 12-month period  
21 designated by the board of supervisors and may be paid for that  
22 employment. That employment shall not operate to reinstate the  
23 person as a member of this system or to terminate or suspend ~~his~~  
24 ~~or her~~ *their* retirement allowance, and no deductions shall be made  
25 from ~~his or her~~ *their* salary as contributions to this system.

26 (b) (1) This section shall not apply to any retired person who  
27 is otherwise eligible for employment under this section if, during  
28 the 12-month period prior to an appointment described in this  
29 section, that retired person receives unemployment insurance  
30 compensation arising out of prior employment subject to this  
31 section with the same employer.

32 (2) A retired person who accepts an appointment after receiving  
33 unemployment insurance compensation as described in this  
34 subdivision shall terminate that employment on the last day of the  
35 current pay period and shall not be eligible for reappointment  
36 subject to this section for a period of 12 months following the last  
37 day of employment.

38 (3) Beginning January 1, 2013, if any provision of this section  
39 conflicts with the California Public Employees' Pension Reform  
40 Act of 2013, the provisions of that act shall prevail, except that



1 the limit on postretirement employment provided in subdivision  
2 (a) to the greater of 90 working days or 720 hours shall remain  
3 effective.

4 SEC. 13. Section 31680.3 of the Government Code is amended  
5 to read:

6 31680.3. (a) Notwithstanding Section 31680.2, any member  
7 who has been covered under the provisions of Section 31751 and  
8 has retired may be reemployed in a position requiring special skills  
9 or knowledge, as determined by the county or district employing  
10 the member, for *a period of time* not to exceed 120 working days  
11 or 960 hours, whichever is greater, in any one fiscal year and may  
12 be paid for that employment. That employment shall not operate  
13 to reinstate the person as a member of this system or to terminate  
14 or suspend the person's retirement allowance, and no deductions  
15 shall be made from the person's salary as contributions to this  
16 system.

17 (b) (1) This section shall not apply to any retired member who  
18 is otherwise eligible for reemployment under this section if, during  
19 the 12-month period prior to an appointment described in this  
20 section, that retired person receives unemployment insurance  
21 compensation arising out of prior employment subject to this  
22 section with the same employer.

23 (2) A retired person who accepts an appointment after receiving  
24 unemployment insurance compensation as described in this  
25 subdivision shall terminate that employment on the last day of the  
26 current pay period and shall not be eligible for reappointment  
27 subject to this section for a period of 12 months following the last  
28 day of employment.

29 (c) Beginning January 1, 2013, if any provision of this section  
30 conflicts with the California Public Employees' Pension Reform  
31 Act of 2013, the provisions of that act shall prevail.

32 SEC. 14. Section 31732 of the Government Code is amended  
33 to read:

34 31732. The board shall secure such medical, investigatory and  
35 other service and advice as is necessary to carry out the purpose  
36 of this article. Notwithstanding Section 31529, the board may  
37 contract with an attorney in private practice for the legal services  
38 and advice necessary to carry out the purpose of this article.  
39 *Notwithstanding Section 31530, the board may contract with a*  
40 *physician in private practice for the medical advice necessary to*

1 *carry out the purpose of this article.* It shall pay for such services  
2 and advice such compensation as it deems reasonable.

3 SEC. 15. Section 31781.2 of the Government Code is amended  
4 to read:

5 31781.2. In lieu of accepting in cash the death benefit payable  
6 under Section 31781 or 31781.01, the surviving spouse of a  
7 member who dies prior to reaching the minimum retirement age  
8 and who at the date of the member's death has 10 or more years  
9 of service to the member's credit, shall have the option to leave  
10 the amount of the death benefit on deposit in the retirement system  
11 until the earliest date when the deceased member could have retired  
12 had the member lived, and at that time receive the retirement  
13 allowance provided for in Section 31765, 31765.1, or 31765.11,  
14 whichever is applicable.

15 If, at the death of the spouse, the spouse is survived by one or  
16 more unmarried children of the member, under the age of 18 years,  
17 the retirement allowance shall continue to the child or children,  
18 collectively, until every child dies, marries, or attains the age of  
19 18 years. If the spouse dies, either before or after the death of the  
20 member, without either making the election or receiving any  
21 portion of the death benefit, and no part of the death benefit had  
22 been paid to any person, prior to the payment of any benefits, the  
23 legally appointed guardian of the children shall make the election  
24 herein provided for on behalf of the surviving children as, in *the*  
25 guardian's judgment, may appear to be in their interest and  
26 advantage, and the election so made shall be binding and  
27 conclusive upon all parties in interest.

28 Notwithstanding any other provisions of this section, the benefits  
29 otherwise payable to the children of the member shall be paid to  
30 those children up to the 22nd birthdays of the children if the  
31 children remain unmarried and are regularly enrolled as full-time  
32 students in an accredited school as determined by the board.

**FOR INFORMATION ONLY**

May 20, 2021

TO: Each Trustee  
Board of Retirement  
Board of Investments

FROM: Ted Granger   
Interim Chief Financial Officer

FOR: June 2, 2021 Board of Retirement Meeting  
June 9, 2021 Board of Investments Meeting

SUBJECT: **MONTHLY EDUCATION & TRAVEL REPORTS – APRIL 2021**

Attached, for your review, are the Board and Staff Education & Travel Reports as of April 2021. These reports include travel (i.e., attended and canceled) during Fiscal Year 2020-2021.

REVIEWED AND APPROVED:



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Santos H. Kreimann  
Chief Executive Officer

TG/EW/krh

Attachments

c: J. Popowich  
J. Grabel  
J. Fontenot  
K. Hines

**BOARD EDUCATION AND TRAVEL REPORT  
FOR FISCAL YEAR 2020 - 2021  
APRIL 2021**

<b>Attendee</b>	<b>Purpose of Travel - Location</b>	<b>Event Dates</b>	<b>Travel Status</b>
<b>Alan Bernstein</b>			
B	- Edu - NACD Real Estate Industry Outlook: Insights, Impacts and Opportunities - VIRTUAL	09/02/2020 - 09/02/2020	Attended
	- Edu - 2020 Milken Institute Virtual Global Conference - VIRTUAL	10/12/2020 - 10/21/2020	Attended
	- Edu- 2020 SACRS Fall Virtual Conference - VIRTUAL	11/10/2020 - 11/13/2020	Attended
	- Edu - Virtual Pension Bridge Alternatives - VIRTUAL	01/26/2021 - 01/28/2021	Attended
	- Edu - CII's 2021 Spring Conference - VIRTUAL	03/08/2021 - 03/10/2021	Attended
<b>Elizabeth Ginsberg</b>			
B	- Edu - CALAPRS Principles for Trustees - VIRTUAL	08/18/2020 - 08/26/2020	Attended
<b>Vivian Gray</b>			
B	- Edu - SACRS Public Pension Investment Management Program 2020 - VIRTUAL	07/28/2020 - 08/13/2020	Attended
	- Edu - Koried Black Directors' Virtual Workshop - VIRTUAL	10/15/2020 - 10/15/2020	Attended
	- Edu- 2020 SACRS Fall Virtual Conference - VIRTUAL	11/10/2020 - 11/13/2020	Attended
	- Edu - Milken Institute: Walk the Talk: Investing in the Future of Black Banks, Entrepreneurship, and Opportunity - VIRTUAL	02/24/2021 - 02/24/2021	Attended
	- Edu - CALAPRS General Assembly - VIRTUAL	03/08/2021 - 03/09/2021	Attended
	- Edu - NASP 11th Annual Day of Education in Private Equity - VIRTUAL	03/25/2021 - 03/26/2021	Attended
	- Edu - NCPERS 2021 Legislative Conference - VIRTUAL	04/20/2021 - 04/20/2021	Attended
<b>David Green</b>			
B	- Edu - PPI 2020 Summer Roundtable - Los Angeles CA	07/14/2020 - 07/16/2020	Attended
	- Edu - Pacific Council - "Beyond the Horizon" Summit - VIRTUAL	07/20/2020 - 07/24/2020	Attended
	- Edu - The Pacific Council on International Policy's PolicyWest 2020 - VIRTUAL	12/03/2020 - 12/04/2020	Attended
<b>Elizabeth Greenwood</b>			
B	- Edu - 2020 Milken Institute Virtual Global Conference - VIRTUAL	10/12/2020 - 10/21/2020	Attended
	- Edu- PPI 2020 Asia Pacific Roundtable - VIRTUAL	10/20/2020 - 10/22/2020	Attended
	- Edu - Yale School of Management Executive Education -Women's Leadership Program - VIRTUAL	11/18/2020 - 11/18/2020	Attended
<b>James Harris</b>			
B	- Edu - SACRS Sexual Harassment Prevention Training - VIRTUAL	07/15/2020 - 07/15/2020	Attended
	- Edu - SACRS Public Pension Investment Management Program 2020 - VIRTUAL	07/28/2020 - 08/13/2020	Attended
<b>Patrick Jones</b>			
B	- Edu - Goldman Sachs The Pandemic Economy: Rates, the Fed & the Road Ahead - VIRTUAL	04/30/2021 - 04/30/2021	Attended

**BOARD EDUCATION AND TRAVEL REPORT  
FOR FISCAL YEAR 2020 - 2021  
APRIL 2021**

<b>Attendee</b>	<b>Purpose of Travel - Location</b>	<b>Event Dates</b>	<b>Travel Status</b>
<b>Shawn Kehoe</b>			
B	- Edu- PPI 2020 Asia Pacific Roundtable - VIRTUAL	10/20/2020 - 10/22/2020	Attended
	- Edu - NCPERS Fall Conference - VIRTUAL	02/02/2021 - 02/03/2021	Attended
<b>Joseph Kelly</b>			
B	- Edu - NACD Financial Services Industry Outlook: Future Trends in Middle Market Credit - VIRTUAL	01/07/2021 - 01/07/2021	Attended
	- Edu - NACD Hospitality and Travel Industry Outlook: Insights, Impacts, and Opportunities - VIRTUAL	01/27/2021 - 01/27/2021	Attended
	- Edu - PPI Virtual Roundtable - VIRTUAL	02/16/2021 - 02/18/2021	Attended
	- Edu - CII's 2021 Spring Conference - VIRTUAL	03/08/2021 - 03/10/2021	Attended
	- Edu - NASP 11th Annual Day of Education in Private Equity - VIRTUAL	03/25/2021 - 03/26/2021	Attended
<b>Keith Knox</b>			
B	- Edu - PPI 2020 Summer Roundtable - Los Angeles CA	07/14/2020 - 07/16/2020	Attended
	- Edu - SACRS Public Pension Investment Management Program 2020 - VIRTUAL	07/28/2020 - 08/13/2020	Attended
	- Edu - CII & NYU Corporate Governance Bootcamp - VIRTUAL	09/23/2020 - 09/25/2020	Attended
	- Edu - 2020 Milken Institute Virtual Global Conference - VIRTUAL	10/12/2020 - 10/21/2020	Attended
	- Edu - CALAPRS Virtual Trustees Round Table - VIRTUAL	10/23/2020 - 10/23/2020	Attended
	- Edu - PPI Virtual Roundtable - VIRTUAL	02/16/2021 - 02/18/2021	Attended
	- Edu - TLF Political Accountability and Investment - VIRTUAL	02/23/2021 - 02/23/2021	Attended
	- Edu - NCPERS Accredited Fiduciary Program (Module 1 & 2) - VIRTUAL	03/02/2021 - 03/05/2021	Attended
	- Edu - NCPERS Accredited Fiduciary Program (Module 3 & 4) - VIRTUAL	03/09/2021 - 03/12/2021	Attended
	- Edu - NCPERS 2021 Legislative Conference - VIRTUAL	04/20/2021 - 04/20/2021	Attended
<b>Wayne Moore</b>			
B	- Edu- NASP 31st Annual Virtual Pension & Financial Services Conference - VIRTUAL	12/07/2020 - 12/10/2020	Attended
	- Edu - NASP 11th Annual Day of Education in Private Equity - VIRTUAL	03/25/2021 - 03/26/2021	Attended
<b>Ronald Okum</b>			
B	- Edu- 2020 SACRS Fall Virtual Conference - VIRTUAL	11/10/2020 - 11/13/2020	Attended
<b>William Pryor</b>			
B	- Edu - NCPERS Fall Conference - VIRTUAL	02/02/2021 - 02/03/2021	Attended
<b>Les Robbins</b>			
B	- Edu - IFEBP 66th Annual Employee Benefits Conference - VIRTUAL	11/10/2020 - 11/13/2020	Attended
	- Edu - NCPERS 2021 Legislative Conference - VIRTUAL	04/20/2021 - 04/20/2021	Attended
X	- Edu - IFEBP 66th Annual Employee Benefits Conference - Honolulu HI	11/15/2020 - 11/18/2020	Host Canceled

**BOARD EDUCATION AND TRAVEL REPORT  
FOR FISCAL YEAR 2020 - 2021  
APRIL 2021**

<b>Attendee</b>	<b>Purpose of Travel - Location</b>	<b>Event Dates</b>	<b>Travel Status</b>
<b>Gina Sanchez</b>			
B	- Edu - SACRS Sexual Harassment Prevention Training - VIRTUAL	07/15/2020 - 07/15/2020	Attended
	- Edu - 2020 Milken Institute Virtual Global Conference - VIRTUAL	10/12/2020 - 10/21/2020	Attended
	- Edu - 2020 Virtual NACD Summit - VIRTUAL	10/12/2020 - 10/13/2020	Attended
	- Edu - CALAPRS Virtual Trustees Round Table - VIRTUAL	10/23/2020 - 10/23/2020	Attended
	- Edu- 2020 SACRS Fall Virtual Conference - VIRTUAL	11/10/2020 - 11/13/2020	Attended
	- Edu - Harvard Business School Executive Education - Audit Committees - VIRTUAL	11/12/2020 - 11/14/2020	Attended
	- Edu - NCPERS Fall Conference - VIRTUAL	02/02/2021 - 02/03/2021	Attended
<b>Herman Santos</b>			
B	- Edu- LAVCA's Annual Investor Meeting - VIRTUAL	09/14/2020 - 09/17/2020	Attended
	- Edu - Nossaman's 2020 Public Pensions and Investments Fiduciaries' Forum - VIRTUAL	10/01/2020 - 10/01/2020	Attended
	- Edu- 2020 SACRS Fall Virtual Conference - VIRTUAL	11/10/2020 - 11/13/2020	Attended
	- Edu - Virtual PPI Salon: Gearing for Gridlock - VIRTUAL	12/10/2020 - 12/10/2020	Attended
	- Edu - PPI Virtual Roundtable - VIRTUAL	02/16/2021 - 02/18/2021	Attended
	- Edu - CII's 2021 Spring Conference - VIRTUAL	03/08/2021 - 03/10/2021	Attended
	- Edu - NASP 11th Annual Day of Education in Private Equity - VIRTUAL	03/25/2021 - 03/26/2021	Attended
	- Edu - PREA Spring Conference - VIRTUAL	03/25/2021 - 03/26/2021	Attended
	- Edu - PREA International Affinity Group Program - VIRTUAL	04/01/2021 - 04/01/2021	Attended

Category Legend:

A - Pre-Approved/Board Approved

B - Educational Conferences and Administrative Meetings in CA where total cost is no more than \$2,000 per Trustee Travel Policy; Section III.A

C - Second of two conferences and/or meetings counted as one conference per Trustee Education Policy Section IV.C.2 and Trustee Travel Policy Section IV.

X - Canceled events for which expenses have been incurred.

Z - Trip was Canceled - Balance of \$0.00



**STAFF EDUCATION AND TRAVEL REPORT  
FOR FISCAL YEAR 2020 - 2021  
APRIL 2021**

<b>Attendee</b>		<b>Purpose of Travel - Location</b>	<b>Event Dates</b>	<b>Travel Status</b>
<b>Systems</b>				
Irwin Devries	1	Admin - Conduct Site Visit of Mesa, AZ Facility - Mesa AZ	12/03/2020 - 12/05/2020	Attended
Celso Tempo	1	Admin - Conduct Site Visit of Mesa, AZ Facility - Mesa AZ	10/09/2020 - 10/09/2020	Attended



**Documents not attached are exempt from disclosure under the California Public Records Act and other legal authority.**

**For further information, contact:  
LACERA  
Attention: Public Records Act Requests  
300 N. Lake Ave., Suite 620  
Pasadena, CA 91101**



**FOR INFORMATION ONLY**

May 20, 2021

TO: Trustees  
Board of Retirement  
Board of Investments

FROM: Ted Granger   
Interim Chief Financial Officer

FOR: June 2, 2021 Board of Retirement Meeting  
June 9, 2021 Board of Investments Meeting

**SUBJECT: 3RD QUARTER EDUCATION & TRAVEL EXPENDITURE REPORTS**

Attached, for your review, are the Board and Staff Education & Travel Reports and the Board Cancellation & Credit Expenditures Report which include expenses paid, submitted for reimbursement, or credited for travel events between July 1, 2020 and March 31, 2021. In addition, the Board Cancellation & Credit Expenditures Report for Fiscal Year 2019-2020 is attached for your reference.

REVIEWED AND APPROVED:



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Santos H. Kreimann  
Chief Executive Officer

TG/EW/krh

Attachments

c: J. Popowich  
J. Gabel  
J. Fontenot  
K. Hines



**3RD QUARTER BOARD  
EDUCATION AND TRAVEL EXPENDITURE REPORT  
FOR FISCAL YEAR 2021  
FOR TRAVEL DURING JULY 2020 - MARCH 2021**

Cat	Purpose of Travel - Location - Travel Dates	Travel Status	Total Expense	Registration	Lodging	Airfare	Ground Transp.	Mileage	Porterage	Parking	Meals	Per Diem	Misc.
<b>Alan Bernstein</b>													
B -	Edu- 2020 SACRS Fall Virtual Conference - VIRTUAL - 11/10/2020 - 11/13/2020	Attended	\$120.00	\$120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals for Alan Bernstein:</b>			\$120.00	\$120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Elizabeth Ginsberg</b>													
B -	Edu - CALAPRS Principles for Trustees - VIRTUAL - 08/18/2020 - 08/26/2020	Attended	\$500.00	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals for Elizabeth Ginsberg:</b>			\$500.00	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Vivian Gray</b>													
B -	Edu - SACRS Public Pension Investment Management Program 2020 - VIRTUAL - 07/28/2020 - 08/13/2020	Attended	\$500.00	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu - Koriad Black Directors' Virtual Workshop - VIRTUAL - 10/15/2020 - 10/15/2020	Attended	\$395.00	\$395.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu- 2020 SACRS Fall Virtual Conference - VIRTUAL - 11/10/2020 - 11/13/2020	Attended	\$120.00	\$120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu - CALAPRS General Assembly - VIRTUAL - 03/08/2021 - 03/09/2021	Attended	\$250.00	\$250.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals for Vivian Gray:</b>			\$1,265.00	\$1,265.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00



**3RD QUARTER BOARD  
EDUCATION AND TRAVEL EXPENDITURE REPORT  
FOR FISCAL YEAR 2021  
FOR TRAVEL DURING JULY 2020 - MARCH 2021**

Cat	Purpose of Travel - Location - Travel Dates	Travel Status	Total Expense	Registration	Lodging	Airfare	Ground Transp.	Mileage	Porterage	Parking	Meals	Per Diem	Misc.
<b>David Green</b>													
B -	Edu - PPI 2020 Summer Roundtable - Los Angeles CA - 07/14/2020 - 07/16/2020	Attended	\$175.00	\$175.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu - Pacific Council - "Beyond the Horizon" Summit - VIRTUAL - 07/20/2020 - 07/24/2020	Attended	\$150.00	\$150.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu - The Pacific Council on International Policy's PolicyWest 2020 - VIRTUAL - 12/03/2020 - 12/04/2020	Attended	\$50.00	\$50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals for David Green:</b>			\$375.00	\$375.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Elizabeth Greenwood</b>													
B -	Edu- PPI 2020 Asia Pacific Roundtable - VIRTUAL - 10/20/2020 - 10/22/2020	Attended	\$175.00	\$175.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu - Yale School of Management Executive Education -Women's Leadership Program - VIRTUAL - 11/18/2020 - 11/18/2020	Attended	\$2,800.00	\$2,800.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals for Elizabeth Greenwood:</b>			\$2,975.00	\$2,975.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>James Harris</b>													
B -	Edu - SACRS Public Pension Investment Management Program 2020 - VIRTUAL - 07/28/2020 - 08/13/2020	Attended	\$500.00	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals for James Harris:</b>			\$500.00	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00



**3RD QUARTER BOARD  
EDUCATION AND TRAVEL EXPENDITURE REPORT  
FOR FISCAL YEAR 2021  
FOR TRAVEL DURING JULY 2020 - MARCH 2021**

Cat	Purpose of Travel - Location - Travel Dates	Travel Status	Total Expense	Registration	Lodging	Airfare	Ground Transp.	Mileage	Porterage	Parking	Meals	Per Diem	Misc.
<b>Shawn Kehoe</b>													
B -	Edu- PPI 2020 Asia Pacific Roundtable - VIRTUAL - 10/20/2020 - 10/22/2020	Attended	\$175.00	\$175.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu - NCPERS Fall Conference - VIRTUAL - 02/02/2021 - 02/03/2021	Attended	\$300.00	\$300.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals for Shawn Kehoe:</b>			\$475.00	\$475.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Joseph Kelly</b>													
B -	Edu - NACD Financial Services Industry Outlook: Future Trends in Middle Market Credit - VIRTUAL - 01/07/2021 - 01/07/2021	Attended	\$30.00	\$30.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu - NACD Hospitality and Travel Industry Outlook: Insights, Impacts, and Opportunities - VIRTUAL - 01/27/2021 - 01/27/2021	Attended	\$30.00	\$30.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu - PPI Virtual Roundtable - VIRTUAL - 02/16/2021 - 02/18/2021	Attended	\$175.00	\$175.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals for Joseph Kelly:</b>			\$235.00	\$235.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00



**3RD QUARTER BOARD  
EDUCATION AND TRAVEL EXPENDITURE REPORT  
FOR FISCAL YEAR 2021  
FOR TRAVEL DURING JULY 2020 - MARCH 2021**

Cat	Purpose of Travel - Location - Travel Dates	Travel Status	Total Expense	Registration	Lodging	Airfare	Ground Transp.	Mileage	Porterage	Parking	Meals	Per Diem	Misc.
<b>Keith Knox</b>													
B -	Edu - PPI 2020 Summer Roundtable - Los Angeles CA - 07/14/2020 - 07/16/2020	Attended	\$175.00	\$175.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu - SACRS Public Pension Investment Management Program 2020 - VIRTUAL - 07/28/2020 - 08/13/2020	Attended	\$500.00	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu - CII & NYU Corporate Governance Bootcamp - VIRTUAL - 09/23/2020 - 09/25/2020	Attended	\$945.00	\$945.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu - CALAPRS Virtual Trustees Round Table - VIRTUAL - 10/23/2020 - 10/23/2020	Attended	\$50.00	\$50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu - PPI Virtual Roundtable - VIRTUAL - 02/16/2021 - 02/18/2021	Attended	\$175.00	\$175.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu - NCPERS Accredited Fiduciary Program (Module 1 & 2) - VIRTUAL - 03/02/2021 - 03/05/2021	Attended	\$400.00	\$400.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu - NCPERS Accredited Fiduciary Program (Module 3 & 4) - VIRTUAL - 03/09/2021 - 03/12/2021	Attended	\$400.00	\$400.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals for Keith Knox:</b>			\$2,645.00	\$2,645.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Wayne Moore</b>													
B -	Edu- NASP 31st Annual Virtual Pension & Financial Services Conference - VIRTUAL - 12/07/2020 - 12/10/2020	Attended	\$100.00	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals for Wayne Moore:</b>			\$100.00	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00



**3RD QUARTER BOARD  
EDUCATION AND TRAVEL EXPENDITURE REPORT  
FOR FISCAL YEAR 2021  
FOR TRAVEL DURING JULY 2020 - MARCH 2021**

Cat	Purpose of Travel - Location - Travel Dates	Travel Status	Total Expense	Registration	Lodging	Airfare	Ground Transp.	Mileage	Porterage	Parking	Meals	Per Diem	Misc.
<b>Ronald Okum</b>													
B -	Edu- 2020 SACRS Fall Virtual Conference - VIRTUAL - 11/10/2020 - 11/13/2020	Attended	\$120.00	\$120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals for Ronald Okum:</b>			\$120.00	\$120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Gina Sanchez</b>													
B -	Edu - CALAPRS Virtual Trustees Round Table - VIRTUAL - 10/23/2020 - 10/23/2020	Attended	\$50.00	\$50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu- 2020 SACRS Fall Virtual Conference - VIRTUAL - 11/10/2020 - 11/13/2020	Attended	\$120.00	\$120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu - Harvard Business School Executive Education - Audit Committees - VIRTUAL - 11/12/2020 - 11/14/2020	Attended	\$5,000.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu - NCPERS Fall Conference - VIRTUAL - 02/02/2021 - 02/03/2021	Attended	\$300.00	\$300.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals for Gina Sanchez:</b>			\$5,470.00	\$5,470.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Herman Santos</b>													
B -	Edu- LAVCA's Annual Investor Meeting - VIRTUAL - 09/14/2020 - 09/17/2020	Attended	\$595.00	\$595.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu- 2020 SACRS Fall Virtual Conference - VIRTUAL - 11/10/2020 - 11/13/2020	Attended	\$120.00	\$120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-	Edu - PPI Virtual Roundtable - VIRTUAL - 02/16/2021 - 02/18/2021	Attended	\$175.00	\$175.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00



**3RD QUARTER BOARD**  
**EDUCATION AND TRAVEL EXPENDITURE REPORT**  
**FOR FISCAL YEAR 2021**  
**FOR TRAVEL DURING JULY 2020 - MARCH 2021**

Cat	Purpose of Travel - Location - Travel Dates	Travel Status	Total Expense	Registration	Lodging	Airfare	Ground Transp.	Mileage	Porterage	Parking	Meals	Per Diem	Misc.
<b>Totals for Herman Santos:</b>			\$890.00	\$890.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Cnt: 0</b>	<b>Grand Totals:</b>		\$15,670.00	\$15,670.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Category Legend:

- A - Pre-Approved/Board Approved
- B - Educational Conferences and Administrative Meetings in CA where total cost is no more than \$2,000 per Trustee Travel Policy; Section III.A
- C - Second of two conferences and/or meetings counted as one conference per Trustee Education Policy Section IV.C.2 and Trustee Travel Policy Section IV.
- X - Canceled events for which expenses have been incurred.
- Z - Trip was Canceled - Balance of \$0.00



**3RD QUARTER STAFF**  
**EDUCATION AND TRAVEL EXPENDITURE REPORT**  
**FOR FISCAL YEAR 2021**  
**FOR TRAVEL DURING JULY 2020 - MARCH 2021**

Attendee	Purpose of Travel - Location - Travel Dates	Travel Status	Total Expense	Registration	Lodging	Airfare	Ground Transp.	Mileage	Porterage	Parking	Meals	Per Diem	Misc.
<b>Systems</b>													
Irwin Devries	1 Admin - Conduct Site Visit of Mesa, AZ Facility - Mesa AZ - 12/03/2020 - 12/05/2020	Attended	\$834.48	\$0.00	\$274.73	\$0.00	\$0.00	\$419.75	\$0.00	\$0.00	\$0.00	\$140.00	\$0.00
<b>Totals for Irwin Devries:</b>			\$834.48	\$0.00	\$274.73	\$0.00	\$0.00	\$419.75	\$0.00	\$0.00	\$0.00	\$140.00	\$0.00
Celso Templo	1 Admin - Conduct Site Visit of Mesa, AZ Facility - Mesa AZ - 10/09/2020 - 10/09/2020	Attended	\$440.45	\$0.00	\$0.00	\$0.00	\$0.00	\$440.45	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals for Celso Templo:</b>			\$440.45	\$0.00	\$0.00	\$0.00	\$0.00	\$440.45	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Cnt: 2</b>	<b>Totals for Systems:</b>		\$1,274.93	\$0.00	\$274.73	\$0.00	\$0.00	\$860.20	\$0.00	\$0.00	\$0.00	\$140.00	\$0.00
<b>Cnt: 2</b>	<b>Grand Totals:</b>		\$1,274.93	\$0.00	\$274.73	\$0.00	\$0.00	\$860.20	\$0.00	\$0.00	\$0.00	\$140.00	\$0.00





**BOARD CANCELLATION AND CREDIT EXPENDITURES REPORT  
FOR FISCAL YEAR 2020  
FOR TRAVEL THROUGH THE 4TH QUARTER OF FY19-20**

Purpose of Travel - Location - Date - Travel Status	Category	Total Expense	Register	Lodging	Airfare	Other Misc Travel Exp.	Chair Pardon	Register Credit (1802)	Register Credit Expiration Date	Airfare Credit (1803)	Airfare Credit Expiration Date	Refund Pending
<b>Vivian Gray</b>												
Admin - SACRS Program Committee and SACRS Board of Directors Meeting - Sacramento CA - 07/15/2019 - 07/19/2019 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Admin - SACRS Legislative Committee - Sacramento CA - 07/19/2019 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Admin - SACRS Program Committee and SACRS Board of Directors Meeting - Sacramento CA - 09/16/2019 - 09/17/2019 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Admin - SACRS Legislative Committee - Sacramento CA - 09/20/2019 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Admin - SACRS Legislative Committee - Sacramento CA - 10/19/2019 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Edu - KACALP Annual Conference - Los Angeles CA - 10/29/2019 - 10/30/2019 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Edu - NASP 2020 "Day of Education in Private Equity" - Los Angeles CA - 03/26/2020 - 03/26/2020 - Host Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Edu - TBI Med Legal Conference - San Diego CA - 04/02/2020 - 04/04/2020 - Host Canceled	X	\$299.00	\$299.00	\$0.00	\$0.00	\$0.00	Yes	\$0.00		\$0.00		\$0.00
Edu - Trustee Leadership Forum (TLF) Trustee Forum - Boston MA - 06/08/2020 - 06/10/2020 - Host Canceled	X	\$275.00	\$0.00	\$0.00	\$275.00	\$0.00	Yes	\$0.00		\$0.00		\$0.00
<b>Attendee Totals:</b>		\$574.00	\$299.00	\$0.00	\$275.00	\$0.00		\$0.00		\$0.00		\$0.00
<b>David Green</b>												
Edu - 2019 Fortune Brainstorm Tech Conference - Aspen CO - 07/15/2019 - 07/17/2019 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
<b>Attendee Totals:</b>		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
<b>James Harris</b>												
Edu - CALAPRS Advanced Principles of Pension Management for Trustees - Los Angeles CA - 03/30/2020 - 04/01/2020 - Host Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
<b>Attendee Totals:</b>		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
<b>Shawn Kehoe</b>												
Edu - National Association of Corporate Directors - Global Board Leaders' Summit - Washington D.C. MD - 09/21/2019 - 09/24/2019 - Canceled	X	\$500.00	\$500.00	\$0.00	\$0.00	\$0.00	Yes	\$4,265.50	10/31/2021	\$0.00		\$0.00
Edu - 2019 Pacific Pension Institute Executive Seminar and Asia Roundtable - Shanghai, China; Hong Kong, China - 11/03/2019 - 11/08/2019 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Edu - IAFCI 2020 Cyber Fraud Summit - Austin TX - 04/15/2020 - 04/16/2020 - Host Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
<b>Attendee Totals:</b>		\$500.00	\$500.00	\$0.00	\$0.00	\$0.00		\$4,265.50		\$0.00		\$0.00



**BOARD CANCELLATION AND CREDIT EXPENDITURES REPORT  
FOR FISCAL YEAR 2020  
FOR TRAVEL THROUGH THE 4TH QUARTER OF FY19-20**

Purpose of Travel - Location - Date - Travel Status	Category	Total Expense	Register	Lodging	Airfare	Other Misc Travel Exp.	Chair Pardon	Register Credit (1802)	Register Credit Expiration Date	Airfare Credit (1803)	Airfare Credit Expiration Date	Refund Pending
<b>Joseph Kelly</b>												
Edu - PPI 2019 Summer Roundtable - Chicago IL - 07/10/2019 - 07/12/2019 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
<b>Attendee Totals:</b>		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
<b>Keith Knox</b>												
Edu - CII's Trustee Training Course for California Public Fund Trustees - Berkeley CA - 10/4/2019 - 10/4/2019 - Host Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Edu - NASP 2020 "Day of Education in Private Equity" - Los Angeles CA - 03/26/2020 - 03/26/2020 - Host Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Edu - IFEBP Wharton Portfolio Concepts and Management - Philadelphia PA - 04/20/2020 - 04/23/2020 - Host Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Edu - SACRS: Don't Stop Thinking About Tomorrow; China A-Share Market & Opportunities - Webinar - 05/13/2020 - 05/13/2020 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Edu - SACRS: Private Markets Today Vs. The Global Financial Crisis - Webinar - 05/14/2020 - 05/14/2020 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Edu - SACRS: Cash Flows & Investment Management in the Time of COVID-19 - Webinar - 05/15/2020 - 05/15/2020 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Edu - SACRS: Private Market Investing in a Late-Cycle Market or Private Market Investing in the 8th Inning - Webinar - 05/20/2020 - 05/20/2020 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Edu - SACRS: Litigation 101 & Current Cases - Webinar - 05/20/2020 - 05/20/2020 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
<b>Attendee Totals:</b>		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
<b>Wayne Moore</b>												
Edu - CII's Trustee Training Course for California Public Fund Trustees - Berkeley CA - 10/4/2019 - 10/4/2019 - Host Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Edu - CII Spring 2020 Conference and 35th Anniversary Celebration - Washington D.C. MD - 03/09/2020 - 03/11/2020 - Canceled	X	\$0.00	\$0.00	\$0.00	\$1,776.08	\$0.00	Yes	\$0.00		\$0.00		\$0.00
Edu - NASP 2020 "Day of Education in Private Equity" - Los Angeles CA - 03/26/2020 - 03/26/2020 - Host Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
<b>Attendee Totals:</b>		\$0.00	\$0.00	\$0.00	\$1,776.08	\$0.00		\$0.00		\$0.00		\$0.00



**BOARD CANCELLATION AND CREDIT EXPENDITURES REPORT  
FOR FISCAL YEAR 2020  
FOR TRAVEL THROUGH THE 4TH QUARTER OF FY19-20**

Purpose of Travel - Location - Date - Travel Status	Category	Total Expense	Register	Lodging	Airfare	Other Misc Travel Exp.	Chair Pardon	Register Credit (1802)	Register Credit Expiration Date	Airfare Credit (1803)	Airfare Credit Expiration Date	Refund Pending
<b>David Muir</b>												
Edu- CII Spring 2020 Conference and 35th Anniversary Celebration - Washington D.C. MD - 03/09/2020 - 03/11/2020 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
<b>Attendee Totals:</b>		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
<b>William Pryor</b>												
Edu - NCPERS 2019 Public Safety Conference - New Orleans LA - 10/27/2019 - 10/30/2019 - Canceled	X	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$522.30	11/3/2021	\$0.00
<b>Attendee Totals:</b>		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$522.30		\$0.00
<b>Les Robbins</b>												
Edu - CRCEA Fall 2019 Conference - Rohnert Park CA - 10/28/2019 - 10/30/2019 - Host Canceled	X	\$291.95	\$0.00	\$0.00	\$291.95	\$0.00	Yes	\$0.00		\$0.00		\$0.00
<b>Attendee Totals:</b>		\$291.95	\$0.00	\$0.00	\$291.95	\$0.00		\$0.00		\$0.00		\$0.00
<b>Gina Sanchez</b>												
Edu - NACI Engage - Oakland CA - 03/24/2020 - 03/25/2020 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Edu - NASP 2020 "Day of Education in Private Equity" - Los Angeles CA - 03/26/2020 - 03/26/2020 - Host Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Edu - Pomerantz Roundtable Event - Beverly Hills CA - 06/16/2020 - 06/16/2020 - Host Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
<b>Attendee Totals:</b>		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
<b>Herman Santos</b>												
Edu - INCA Investments Latin American Investments Conference - Buenos Aires, Argentina - 10/16/2019 - 10/17/2019 - Canceled	X	\$1,858.15	\$0.00	\$1,579.75	\$278.40	\$0.00	Yes	\$0.00		\$0.00		\$0.00
Edu - 2020 ICGN Seoul Conference - Seoul, South Korea - 02/25/2020 - 02/28/2020 - Host Canceled	X	\$45.08	\$23.48	\$0.00	\$21.60	\$0.00	Yes	\$0.00		\$0.00		\$0.00
Edu- CII Spring 2020 Conference and 35th Anniversary Celebration - Washington D.C. MD - 03/09/2020 - 03/11/2020 - Canceled	X	\$362.20	\$0.00	\$0.00	\$1,081.80	\$0.00	Yes	\$0.00		\$0.00		\$0.00
Edu - NASP 2020 "Day of Education in Private Equity" - Los Angeles CA - 03/26/2020 - 03/26/2020 - Host Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Edu - TBI Med Legal Conference - San Diego CA - 04/02/2020 - 04/04/2020 - Host Canceled	X	\$299.00	\$299.00	\$0.00	\$0.00	\$0.00	Yes	\$0.00		\$0.00		\$0.00
<b>Attendee Totals:</b>		\$2,564.43	\$322.48	\$1,579.75	\$1,381.80	\$0.00		\$0.00		\$0.00		\$0.00



**BOARD CANCELLATION AND CREDIT EXPENDITURES REPORT  
FOR FISCAL YEAR 2020  
FOR TRAVEL THROUGH THE 4TH QUARTER OF FY19-20**

Purpose of Travel - Location - Date - Travel Status	Category	Total Expense	Register	Lodging	Airfare	Other Misc Travel Exp.	Chair Pardon	Register Credit (1802)	Register Credit Expiration Date	Airfare Credit (1803)	Airfare Credit Expiration Date	Refund Pending
<b>Gina Zapanta</b>												
Edu - IFEBP 65th Employee Benefits Conference - San Diego CA - 10/20/2019 - 10/23/2019 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Edu - NCPERS 2019 Public Safety Conference - New Orleans LA - 10/27/2019 - 10/30/2019 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
Edu - TBI Med Legal Conference - San Diego CA - 04/02/2020 - 04/04/2020 - Host Canceled	X	\$299.00	\$299.00	\$0.00	\$0.00	\$0.00	Yes	\$0.00		\$0.00		\$0.00
<b>Attendee Totals:</b>		\$299.00	\$299.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		\$0.00
<b>Grand Totals:</b>		\$4,229.38	\$1,420.48	\$1,579.75	\$3,724.83	\$0.00		\$4,265.50		\$522.30		\$0.00

Category Legend:

- X - Canceled events for which expenses have been incurred
- Z - Canceled events for which no expenses have been incurred



**BOARD CANCELLATION AND CREDIT EXPENDITURES REPORT  
FOR FISCAL YEAR 2021  
FOR TRAVEL DURING JULY 2020 - MARCH 2021**

Purpose of Travel - Location - Date - Travel Status	Category	Total Expense	Registration (Reg.)	Lodging	Airfare	Other Misc. Travel Exp.	Chair Pardon	Reg. Credit	Reg. Credit Expiration Date	Airfare Credit	Airfare Credit Expiration Date	Refund Pending
<b>Alan Bernstein</b>												
Edu - IFEBP 66th Annual Employee Benefits Conference - Honolulu HI - 11/15/2020 - 11/18/2020 - Host Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		
<b>Attendee Totals:</b>		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		
<b>Vivian Gray</b>												
Edu - CII & NYU Corporate Governance Bootcamp - VIRTUALI -9/23/2020 - 9/25/2020 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		
<b>Attendee Totals:</b>		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		
<b>Shawn Kehoe</b>												
Edu - IFEBP 66th Annual Employee Benefits Conference - Honolulu HI - 11/15/2020 - 11/18/2020 - Host Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		
<b>Attendee Totals:</b>		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		
<b>Les Robbins</b>												
Edu - IFEBP 66th Annual Employee Benefits Conference - Honolulu HI - 11/15/2020 - 11/18/2020 - Host Canceled	X	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$2,125.00	11/30/2021	\$0.00		
Edu - 2020 SACRS Fall Virtual Conference -VIRTUAL - 1/10/2020 - 11/13/2020 - Canceled	Z	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00		\$0.00		
<b>Attendee Totals:</b>		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$2,125.00		\$0.00		
<b>Grand Totals:</b>		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$2,125.00		\$0.00		

Category Legend:

X - Canceled events for which expenses have been incurred.  
Z - Trip was Canceled - Balance of \$0.00



**Documents not attached are exempt from disclosure under the California Public Records Act and other legal authority.**

**For further information, contact:  
LACERA  
Attention: Public Records Act Requests  
300 N. Lake Ave., Suite 620  
Pasadena, CA 91101**



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