

***§501-c-9 Post- Retirement Medical Plan & Trust***

*a single employer plan sponsored by  
Truckee Meadows Water Authority*



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**TO:** Board of Trustees of the §501-c-9 Post-Retirement Medical Plan & Trust  
**FROM:** Jessica Atkinson, TMWA Human Resources Administrator  
**DATE:** June 15, 2017  
**SUBJECT:** **Discussion regarding trustee action relating to the review and approval/denial of requests for reimbursement.**

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Currently, retirees who request reimbursement from the trust do so in accordance within their approved annual or lifetime credits by completing the “Medical Premium Expense Reimbursement Request Form” and attaching proof of payment and coverage.

These reimbursement requests are submitted to the Post Retirement Medical Plan & Trust care of TMWA Human Resources Department. The TMWA Human Resources Department verifies that the reimbursement request forms are complete and include the appropriate backup documentation and then approves or denies the requests prior to submitting to finance for approval and payment. Finance reviews the request and authorizes payment not to exceed the available and remaining trust credit balance.

Due to the pending approval of changes to the trust that will better clarify eligible reimbursement items, a review of the reimbursement policy as well as the trust document was conducted. Neither the trust document nor the reimbursement request policy delegates the authority to approve benefit payments or reimbursement requests to anyone other than the Trustees.

Going forward, to ensure the appropriate authority is reviewing and approving/denying benefit and reimbursement payments, all requests for reimbursement will be presented to Trustees during open meetings for their review and consideration. This will also help to ensure that each request is deemed an eligible for reimbursement under the trust and that all appropriate documentation has been completed and submitted.