



## Ohio Administrative Code

### Rule 3307:1-11-04 Health care services - health care assistance program.

Effective: June 3, 2021

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(A) The retirement board authorizes health care assistance for certain benefit recipients who apply, qualify, and are approved for the health care assistance program.

(B) The following benefit recipients shall be eligible to apply annually for health care assistance under the health care assistance program on a form provided by the retirement system. The benefit recipient must be enrolled in the health care program and enrolled in medicare, if eligible, and meet the total household income requirements of paragraph (C) of this rule:

(1) A service retiree who has twenty-five or more years of total service credit at retirement.

(2) A disability benefit recipient.

(3) A survivor annuitant or survivor benefit recipient who was enrolled in the health care assistance program as of December 31, 2015, continues to meet all other health care assistance program requirements, and remains continuously enrolled in the health care assistance program.

(C) A benefit recipient's total household income shall not exceed the amount determined by the retirement board for any of the amounts below:

(1) The benefit recipient's monthly benefit annualized at the time of the application for the health care assistance program;

(2) The total estimated household earnings and reportable earnings according to the Internal Revenue Code of all persons in the benefit recipient's household as reported on the tax returns filed for the previous tax year and the applicable limit set by the board for the tax year; and

(3) The combined total liquid assets for all persons within the benefit recipient's household, which includes cash and all monies readily available in savings accounts, checking accounts, money market



accounts, trust funds, any publicly traded security or other investment vehicles as the board may from time to time specify.

(4) If the benefit recipient or a member of the benefit recipient's household is not required to file an income tax return, the benefit recipient may submit to the retirement system a written sworn statement on the form provided by the retirement system.

(D) Applicants for the health care assistance program shall provide all information requested by the retirement system, including copies of any federal income tax return for the benefit recipient and each person in the benefit recipient's household to verify the income and assets reported on the application and, if applicable, verification of medicare enrollment.

(E) If the application for health care assistance is approved by the retirement system, health care assistance is provided through the end of the plan year. Health care coverage as determined by the retirement board through certain medical plans shall begin:

(1) January first of the following year for renewal applications received on or before December fifteenth of the current year; or

(2) The first day of the month following the date a new application is received for applications received on or before the fifteenth day of the month; or

(3) The first day of the second month from the date a new application is received for applications received after the fifteenth day of the month; or

(4) The later of the effective benefit date or the effective date established under paragraph (E)(2) or (E)(3) of this rule for "benefit recipients" who apply for the health care assistance program at the same time an application for service retirement benefits or disability benefits is filed with the retirement system.

(F) The health care assistance program may be changed or terminated by the retirement board at any time.



(G) Health care assistance under this rule provided as the result of false information submitted on an application shall be terminated immediately. Any person who submits false or misleading information in connection with an application for health care assistance shall immediately repay the amounts of any health care assistance provided to date. If such amounts remain unpaid, they shall be deducted from any future amounts payable under Chapter 3307. of the Revised Code. The retirement system may collect amounts due in any other manner the system considers appropriate, as provided by law.