



P.O. Box 13300, Tallahassee, FL 32317-3300

## **Investment Plan Members Eligibility for the Health Insurance Subsidy Florida Retirement System (FRS)**

The Health Insurance Subsidy (HIS) is a subsidy payable to eligible **retired members** or surviving spouses to assist in payment of health insurance costs. The HIS is not a health insurance policy. Eligible retirees (or surviving spouse) will receive \$5 per month for each year of service credit earned. For the Investment Plan, the HIS is payable once normal retirement date is reached by the member. Normal retirement date is age 62 with six years of vested service or 30 years of service at any age (age 55 with six years or 25 years of service for Special Risk). The payment is at least \$30 but not more than \$150 per month and is contingent upon continued approval by the Florida Legislature.

**If you predecease your spouse, if any, only your spouse will be entitled to receive your HIS benefit. It is not available to any other beneficiary.**

All of the following are **required** to receive the Health Insurance Subsidy payment:

1. The FRS Investment Plan member must have terminated all FRS employment.
2. A properly completed Application for Health Insurance Subsidy for Investment Plan Members (HIS-IP). The HIS-IP Form must be signed in the presence of a notary public. The HIS-IP Form should be submitted to the Division of Retirement up to six months before the normal retirement date, even if other documents are not available.
3. A properly completed Health Insurance Subsidy Certification for Investment Plan Members (HIS-IP-2). This form must be completed after the termination date.

The retiree or surviving spouse who is entitled to benefits as of the normal retirement date from the Investment Plan may be eligible for the HIS benefit if he or she has health insurance coverage, Medicare or TRICARE coverage. Medicare recipients must attach a signed photocopy of the Medicare card to the HIS-IP-2 Form. TRICARE recipients must attach a photocopy of both sides of the Military Identification Card to the HIS-IP-2 Form.

**You will not be eligible for the HIS based upon health coverage with Medicaid, Medically Needy Programs, or the Health of the Brotherhood.**

4. Proof of birth date for the member. We will accept photocopies of one of the following, except for (g).
  - a. Birth Certificate
  - b. Delayed birth certificate
  - c. Census report more than 30 years old
  - d. Life insurance policy more than 30 years old
  - e. Letter from Social Security Administration stating the date of birth it has established for the payment of benefits
  - f. Certificate of Naturalization
  - g. In the absence of one of the above, a document from **two** of the following categories will be required:
    - (1) Birth certificate of child, showing age of parent (limit one);
    - (2) Baptismal certificate more than 30 years old;
    - (3) Hospital record of birth;
    - (4) School record at time of entering grammar school;
    - (5) A copy of the member's death certificate will be required if a qualified beneficiary is applying for the subsidy.

**CONTACT the Division of Retirement** if you have any questions or need to discuss your eligibility to receive the Health Insurance Subsidy. Call 1-866-446-9377, option 3 or write the Division of Retirement, Bureau of Calculations, P.O. 9000, Tallahassee, FL 32315-9000

**Note: The HIS payment shall be payable beginning with the month the member attains normal retirement date provided the Division of Retirement has received the Application for Health Insurance Subsidy for Investment Plan members and the Health Insurance Subsidy Certification Form within 6 months following that date. If the Division receives the application and certification forms 7 or more months after the member's normal retirement date, the retroactive HIS payment will cover a maximum of 6 months. HIS payments shall not be subject to assignment, execution or attachment or to any legal process whatsoever.**