

Florida Retirement System (FRS)
Application for Health Insurance Subsidy for
Investment Plan Retirees

PO BOX 9000 Tallahassee, FL 32315-9000
Local Phone: 850-907-6500 Toll Free: 844-377-1888 FAX: 850-410-2010

The Health Insurance Subsidy (HIS) is a subsidy payment to retired members or a qualified beneficiary to assist in the payment of health insurance cost. **HIS is not a health insurance policy.** Eligible retirees or beneficiaries will receive \$5 per month for each year of service credit earned. The payment is at least \$30 but not more than \$150 per month. The subsidy payment is contingent upon continued approval of the Florida Legislature.

ELIGIBILITY:

In order to be eligible for the Health Insurance Subsidy you must meet all the following criteria:

- You must have terminated employment with all FRS participating employers.
- You must have the years of creditable service required to vest under the FRS Pension Plan.
- You must be retired, which means that you have taken a distribution from your FRS Investment Plan account other than a minimum required distribution or a mandatory de minimis distribution. A rollover of your FRS Investment Plan account to another qualified plan is a distribution.
- You meet normal retirement by age or years of service under the FRS Pension Plan as defined in Section 121.021, F.S.
- You must have health insurance coverage, Medicare or TRICARE coverage for the period during which you receive the subsidy payment. Health coverage through Medicaid, Medically Needy Programs or the Health of the Brotherhood does not qualify as health insurance coverage for the Health Insurance Subsidy.

APPLICATION PROCESS:

The FRS Investment Plan retiree or his or her spousal beneficiary who meets the eligibility criteria above and wishes to receive the Health Insurance Subsidy must submit the following to the Division of Retirement **after terminating all employment with FRS employers and retiring from the FRS Investment Plan (taken a distribution or rollover):**

- Apply for the Health Insurance Subsidy on Form HIS-IP, Application for Health Insurance Subsidy for Investment Plan Retiree. This form must be properly completed, signed in the presence of a notary public and submitted to the Division of Retirement.
- Certify your health insurance coverage to the Division of Retirement by properly completing Form HIS-IP-2, Health Insurance Subsidy Certification for Investment Plan Retirees.
 - Medicare recipients may certify their health insurance coverage by completing Section C of the Form HIS-IP-2 and attaching a photocopy of their signed Medicare card to the form.
 - TRICARE recipients may certify their health insurance coverage by completing Section C of the Form HIS-IP-2 and attaching a photocopy of both sides of the Military Identification Card.
 - All other types of insurance coverage must be certified as provided in either Section A or B of the form.
- Proof of your birth date. If you select Option 3 or 4, you must also submit birth date verification for your beneficiary. We will accept legible 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
 - e. Letter from the 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
 - (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
- A copy of the member's death certificate will be required if a qualified beneficiary is applying for the subsidy.

Note: If the member meets the above eligibility requirements, then the earliest the HIS payment could be payable is the month after taking a distribution, provided the Division of Retirement receives Forms HIS-IP and HIS-IP-2 within six calendar months following the distribution. If the Division receives the application and certification forms seven or more months after the member's distribution, the retroactive HIS payment will be limited to the maximum of six months. HIS payments shall not be subject to assignment, execution or attachment or to any legal process whatsoever.

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Member Name	_____	Member SSN	_____
Member Date of Birth	_____	Applicant SSN If different	_____
Applicant Name If different	_____	Home Phone	_____
Applicant Date of Birth	_____	Daytime Phone	_____
Applicant relationship to Member	_____		
Mailing Address	_____		

I hereby make application for the Health Insurance Subsidy payment. I certify that I am terminated from all Florida Retirement System employers as of _____, certify that I have retired (taken a distribution other than a minimum required distribution or a mandatory de minimis distribution) from the Florida Retirement System Investment Plan on _____ and meet the vesting, normal retirement and other eligibility criteria.

The following individual may be contacted, if necessary, in the event of my death (This is not a beneficiary designation):

Name	_____	Relationship	_____
Mailing Address	_____		

Telephone	_____		

Applicant Signature: (sign in the presence of a Notary) _____

Notary: State of Florida, County of _____. The above named person who has sworn to and subscribed before me this ____ day of _____ 20 ____ and is personally known _____ or has produced _____ as identification.

Signature of Notary Public

Print, Type or Stamp Commissioned Name of Notary Public