

## Retiree Medical Reimbursement Accounts

The City of Santa Rosa offers two reimbursement accounts for retirees of certain units – Retiree Stipend administered by Vimly and Retiree Health Savings (RHS) through MissionSquare (Previously ICMA) . Refer to the [Benefits Available by Unit](#) table to see which may apply to you. Read below for more information about these plans.

### *Retiree Stipend*

The City of Santa Rosa provides a post-retirement medical benefit plan for eligible employees known as the Retiree Stipend Plan. The amount of your stipend is based on your unit and years of service at the time of separation from your City of Santa Rosa employment and there is a minimum age requirement, which varies by unit, to be eligible to access your stipend. Please note the amount of your stipend is not guaranteed. It may decrease or increase in the future.

At your exit interview with the City, your [Stipend Eligibility Form](#) will be provided to you. This form is used to enroll you in the stipend plan with the City's third-party administrator (Vimly). The Stipend Eligibility Form must be signed and submitted prior to your last working day. A copy will be provided to you for your records.

This Retiree Stipend Plan provides a monthly tax-free stipend that is available to be used for eligible health care expenses. Eligible expenses are described in section 213(d) of the Internal Revenue Code (IRC). [Stipend plan documents are available on the City's intranet.](#)

Vimly will mail a stipend information packet within 30 days of your retirement date. **If you do not receive your stipend plan information packet within 30 days of your retirement, please contact Human Resources at [benefits@srcity.org](mailto:benefits@srcity.org).**

### *Accessing Your Stipend Account*

To receive reimbursement for eligible expenses, participants must submit required documentation to the City's third-party administrator, Vimly. Eligibility for reimbursement is based on the calendar year January 1 to December 31, which means documentation from a prior plan year will not transfer to the next. Please note the following important information about accessing your stipend benefit:

- Stipend benefits are accrued monthly and posted to a member's account
- Claims must be submitted no later than 90 days after the end of the plan year (March 31<sup>st</sup>) for eligible expenses incurred during the plan year (Jan. 1 to Dec. 31)
- Claims are reimbursed up to the balance available in the member's account
- If funds remain in the account at the end of the plan year, funds are forfeited and returned to the trust

Be sure to review the **Claim packet** for claim forms and requirements before submitting your claim. Incomplete or incorrect documentation may result in a denial. Follow the instructions on the claims form when submitting claims. Required documentation for reimbursement must include the following:

1. Completed Claim Form

***And***

2. Receipts – must include:

- Name of the patient (you, your spouse or eligible dependent)
- Date the service was provided
- Name of the service provider
- Description of the service
- Cost of the item or service provided

Access your Vimly stipend account information by creating a profile and log in here:  
<https://srmst.simon365.com/login/self-register>

**Questions about your stipend?** Contact Vimly's Customer Service Center for assistance at 833-383-0081 or email [SRMST@Vimly.com](mailto:SRMST@Vimly.com)

### *Retiree Health Savings (RHS) Plan*

Employees of eligible units participate in the VantageCare RHS plan offered through MissionSquare (Previously ICMA). Participation in the RHS plan is mandatory. RHS contributions are made on a pre-tax basis. No Social Security, Medicare or income taxes are payable on these amounts.

During your employment with the City or [upon your exit](#), contributions are made to your own personal account. The plan provides reimbursement on eligible medical expenses. To receive reimbursement for eligible expenses, participants must submit required documentation to MissionSquare (Previously ICMA).

Information about RHS Health Savings Plans is available on the [Employee Benefits Website](#) under the "Retiree" section.

**Questions about the VantageCare RHS plan offered through MissionSquare (Previously ICMA) or about how to submit a claim?** Contact MissionSquare at 1-800-669-7400.