

NPUT ***BULLETIN*** *E-MAIL*

NEW PALTZ UNITED TEACHERS BENEFIT TRUST FUND

Ron Simon, Asst. Administrator
Jon Stern, Administrator

February 10, 2023

***REMINDER REGARDING MEDICARE PART B & IRMAA REFUNDS
FROM THE DISTRICT***

While this is not an issue that the NPUT Benefit Trust has control over, we nevertheless field questions about this from many retirees each year. So let's review the issue.

Each year you receive a statement from Social Security indicating what your benefit will be for the coming year. Included in this statement is the amount being withheld from Medicare Part B. Once you turn 65, Medicare becomes your primary insurance coverage and the plan you have through the district becomes your secondary coverage. At that point you are entitled to a refund of your Medicare Part B withholding along with your IRMAA (Income Related Monthly Adjustment Amount) withholding, also listed on your Social Security statement. The amount withheld will vary from year to year and are based upon earnings from two years prior. These reimbursements are issued every six months- the first sometime around January 1 and the second around July 1. However, these reimbursement are not automatic. If the district has not received a copy of your Social Security statement, they will not know how much to reimburse you. **Therefore, to receive your reimbursement from the district it is imperative that you send a copy of your Social Security statement to the district each year, or else the district will not process your payment. Statements should be sent to:**

**Business Office- Attention: Melinda Ottavan
New Paltz Central School District
196 Main Street
New Paltz, NY 12561**

If you are a Medicare recipient and have not yet sent your Social Security statement to the district office, **don't delay - do so today**. Further questions regarding this should be addressed to Melinda (Mindi) Ottavan. Her email address is:

mottavan@newpaltz.k12.ny.us

SOME ISSUES WITH DAVIS VISION

We have been made aware of a potential issue with some members going to their vision provider and being told that they are not covered by Davis Vision. There was some confusion resulting from the merger between Davis Vision and Versant Health and the merging of their data bases. In some cases we have come across, the problem was due to incorrect or missing birth date information. If you experience a problem with your vision provider telling you that you are not covered by Davis Vision, let us know so we can confirm your eligibility and your correct information. It is a simple fix from our end.

COMMUNICATIONS WITH THE TRUST ADMINISTRATION

Your trust administrators stand ready to assist you with issues that may arise. Some answers to questions are easily found by accessing our website:

1. Information regarding all benefits plans, as well as the registration forms should you need to make changes can be found by going to our website at:

www.nputbenefittrust.org

In addition, the section on Frequently Asked Question (FAQs) may also be helpful to you.

2. Of course, some issues can only be resolved by reaching out to either Ron or Jon directly. Should you need to contact either of us the contact information is as follows:

Ron Simon, Assistant Administrator, through my personal e-mail:

RonSimon@aol.com.

I advise using e-mail as that way the trust has a record of your inquiry. If you need to reach me by phone, my cell phone number is 845-649-6761 and my home phone is 845-255-1488. As you will generally get a recording on my home phone, (I now screen my calls due to the number of

annoying robo-calls), please speak slowly and clearly so that the message is intelligible. I will return your call you as soon as I am able to retrieve your message. Again, e-mail is the best way to communicate with me as I check my e-mail quite frequently.

3. Jon Stern, our Trust Administrator, can be reached by email at:

jsstern@nputbenefittrust.org

Jon's phone number is: 845-750-8841

4. The trust also maintains a mailbox at the post office. Any trust related forms or inquiries can be made through USPS mail by sending them to:

NPOT Benefit Trust
P.O. Box 848
New Paltz, New York 12561

5. Finally, and MOST IMPORTANT, please notify us of any change in your contact information, especially changes to address, telephone and e-mail. We want to make sure we are able to keep you informed of important NPOT Trust news in a timely and efficient manner.

We look forward to improving our continuing service to our retiree members. Let us know anytime we can be of assistance to you.

With all best wishes to you and your families,

Ron Simon

Jon Stern