

# **ASEA/AFSCME LOCAL 52 HEALTH BENEFITS TRUST**

## **Policy on Participant and Beneficiary Requests to View Trust Documentation**

Participants in the health benefits Plans provided through the ASEA/AFSCME Local 52 Health Benefits Trust, and their eligible dependents (Beneficiaries), are entitled to view copies of the documents under which the Trust is established or operated at the Trust Administrative Office, located at 111 West Cataldo, Suite 110, Spokane, Washington 99205-0434, provided the following:

- The requesting party shall give the Administrator reasonable advance notice of not less than two business days of the time they will be in Trust Administrator's Office to view the documentation.
- The requesting party shall specify which Trust documentation they wish to view at the time they provide advance notice of the date they request to view the documentation.
- Prior to viewing the Trust documentation, the requesting party shall provide identification to the Trust Administrator sufficient to establish that he or she is a current Participant or Beneficiary under the Trust.
- The requesting party may request that the Trust Administrator make copies of a document being viewed, at the cost of \$0.15 per copy to the requesting party.
- The Trust Administrator shall have the ability to extend the date for the records review if the Trust Administrator cannot reasonably accommodate the request due to workload due to Open Enrollment, or other Trust matters, or an extreme volume of requests. If the time for the records review is extended for any of the foregoing reasons, the Trust Administrator will schedule the appointment to review the records for the earliest possible date.

Records regularly maintained for viewing and/or distribution upon request to Participants and Beneficiaries shall include the following documents, as required under ERISA Section 104(b)(2) and (4) which the Trust adopts as guidance for the release and communication of Trust documentation and records.

- The current Plan Booklet
- Any Summary of Material Modifications
- The latest annual report
- Any terminal report

- The current Collective Bargaining Agreement between ASEA/AFSCME Local 52 and the State of Alaska
- The Trust Agreement and any amendments thereto
- Formally adopted written policies
- Other documents which specify procedures, formulas, methodologies or schedules to be applied in determining or calculating the Participant's or Beneficiary's benefit entitlement maintained in the Trust Administrative Office.

Documents which do not directly affect the Participant's or Beneficiary's benefit entitlements under the Plans provided through the Trust, or which do not establish, amend, or constitute part of the Plans, are not subject to disclosure. Documents which are not regularly maintained in the Trust Administrative Office are not subject to disclosure.

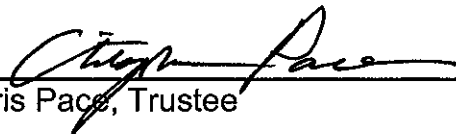
Upon written request by a Participant or Beneficiary, the Trust Administrator shall provide copies at no cost to the requesting party of any of the documents specified in the request included in the list above within 30 days of the request. Written requests by mail should be directed to: ASEA/AFSCME Local 52 Health Benefits Trust Administrator c/o Administrative Services, Inc., P.O. Box 5434, Spokane, Washington 99205-0434.

No document containing a Participant's or Beneficiary's personally identifiable medical information will be released to any requesting party without a signed authorization for release of medical records, unless the release of such information is pursuant to an exception provided by current U. S. Department of Labor Privacy Regulations.

This Policy is adopted this December 9<sup>th</sup>, 2004, replaces any previously adopted versions, and is effective until revoked, revised, or amended.



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Fred G. Brown, Trustee



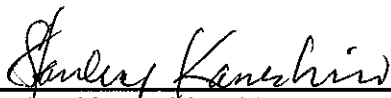
\_\_\_\_\_  
Chris Pace, Trustee



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Michael Williams, Trustee



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Frank Puschak, Trustee



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Stanley Kaneshiro, Trustee



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Patricia Nault, Trustee