

Everett School Employee Benefit Trust Operations Manual for Trustees

Table of Contents

100 Administration Policies and Procedures

100	General Administration
100.1P	Trust Administration
100.2P	Adopting Procedures
100.3P	Third Party Administrators, Consultants and Advisors
100.4P	District or Association Action
100.5P	Non Discrimination
110	Trustees
110.1P	Membership
110.2P	Appointments
110.3P	Meetings
110.4P	Trustee Action
110.5P	Agendas, Meetings and Records
110.6P	Signing of Documents
110.7P	Delegation of Duties
110.8P	Reliance on Information
110.9P	Compensation
120	Trust and Plan Terms
130	Administrative Authority

200 Finance Policies and Procedures

200	Financial Policy
200.1P	Financial Management
200.2P	Trust Fund Management
210	Loyalty and Prudence
220	Investment Guidelines
230	Accounting Period
230P	Accounting
240	Payment for Travel Expenses

300 Communications Policies and Procedures

300	Communications
300.1P	Communications
300.2P	Participant Communications

400 Compliance and Risk Management Policies and Procedures

- 400 Compliance and Risk Management
- 410 Claims and Appeals
 - 410P Claims Procedure
- 420 Audits
- 430 Health Insurance Portability and Accountability Act of 1996 (HIPAA) – Privacy and Security
- 440 Reports
- 450 Records Retention and Management
- 460 Family and Medical Leave Act and Continuation of Coverage
- 470 Wellness Program
- 480 COBRA Premium Subsidy Under the ARRA
 - 480P COBRA Premium Subsidy Under the ARRA