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## WASHINGTON STATE COMBINED FUND DRIVE POLICIES AND PROCEDURES

Policy     Procedure

<b>Title:</b> CFD Retiree Policy	
<b>Developer Name:</b> Heather Lucas	<b>Submission Date:</b> 5/1/2018
<b>Approved by:</b> Philip Kerrigan	<b>Approval Date:</b> 5/1/2018
<b>Approving Signature:</b> 	

### OVERVIEW

This statement discloses the policy drafted by the Washington State Combined Fund Drive (CFD) on continuation of donations for state employees who retire.

The CFD allows for retired state and higher education employees who receive benefits from the Department of Retirement Systems (DRS) to give through their benefits checks to the charity of their choice.

### DEFINITIONS

The following definitions apply to this policy and procedures for retirees in the CFD system:

- **Team Member:** This term is applied to the employer for each state and higher education employee in the CFD system.
  - **Examples:** Office of the Secretary of State, Eastern Washington University and Port of Olympia are team members.
- **DRS Retirees:** The team member assigned to all retirees with active pledges.

### PROCEDURE

The CFD receives a Donor Changes File on a weekly basis that indicates a donor has served as a State of Washington employee for five years or more, is of retirement age and has been deemed inactive in the CFD system. Donors are transferred from their former team member to DRS Retirees based on active pledges utilizing the following procedure:

- **Verify Active Pledges:** CFD staff must research each donor under the "Recently Retired" tab from the Donor Changes File to see if they have current pledges on file. Those with current pledges are eligible to be transferred and can continue to give.
- **Obtain Social Security Numbers (SSNs):** When a donor retires from state service, their employee ID is no longer valid. DRS utilizes SSNs as a replacement for employee ID numbers. CFD staff must contact the OSOS IT Web Team to request SSNs for donors with active pledges on file to transfer donors to DRS Retirees.
- **Transfer Donors:** Upon receiving SSNs via password protected files, CFD staff must transfer each donor with active pledges from their former team member to DRS Retirees in the CFD system.
- **Automatic File Generation:** A payload file for each team member is generated near the end of the month containing all donations that need to be deducted. Payroll offices



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and staff for each team member upload the file for processing to begin or continue deductions.

- **Confirmation:** DRS staff send CFD staff a confirmation of all donors who will receive retirement benefits the following month who will also have deductions taken from their benefits checks.

Donations are refundable in an open quarter. Any retiree who decides they do not want CFD deductions to continue into their retirement is eligible to cancel donations and receive a refund per the [CFD Refund Policy](#).

### CONTACT US

For further questions regarding this memorandum of policy, you can reach the state CFD office at:

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