



Centenarian Letter Program

March 3, 2010

U.S. Railroad Retirement Board Phone: (312) 751-7139
844 North Rush Street TTY: (312) 751-4701
Chicago Illinois, 60611-2092 Web: <http://www.rrb.gov>

155.05 General

A Railroad Retirement Board field service claims representative personally visits each annuitant who attains age 100, with the exception of those centenarians who reside in accredited nursing homes, in order to deliver a congratulatory letter signed by the Board Members. The personal visit to deliver the centenarian letter serves a number of purposes. The visit not only allows the field office to deliver the letter of congratulations signed by the Board Members, it allows the field office to verify that the annuitant is, in fact, alive, and to determine whether the annuitant needs a representative payee.

For those centenarians residing in accredited nursing homes, the congratulatory letter can be mailed to the annuitant. NOTE: An accredited nursing home has been licensed by the State making them subject to the State's laws and regulations and/or certified to participate in, and be reimbursed by Medicare or Medicaid as a "skilled nursing facility" (SNF) or as a "nursing facility" (NF) and is subject to Federal laws and regulations. Verification that the annuitant is alive and the determination whether the annuitant needs a representative payee can be resolved through telephone calls to the annuitant, annuitant's family, nursing home, or physician, as necessary.

155.10 Headquarters and Field Service Responsibilities

Responsibilities for the Centenarian Letter Program are shared by the Office of Programs' Assessment and Training (A&T) and Field Service (FS) sections and the Bureau of Actuary.

155.10.05 Assessment and Training (A&T) Responsibilities

Each year, Assessment and Training (A&T) submits a computer job request to generate a listing of annuitants who will attain age 100 in the upcoming year. The dataset generated by the program is downloaded into an Excel spreadsheet, and the spreadsheet is forwarded to Field Service (FS). The spreadsheet is used by FS as a control listing, and by the field offices as a tool in scheduling future visits to the annuitants. A&T also provides the Bureau of the Actuary with a listing of foreign centenarians.

A&T also gathers statistics on the results of the visits to annuitants who have attained age 100. The statistics are used to prepare the annual program integrity report, and to gauge the effectiveness of the program.



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155.10.10 Bureau of Actuary Responsibilities

On a quarterly basis, the Bureau of Actuary runs a computer program to identify annuitants for whom congratulatory letters need to be prepared. The program is run several months in advance of each calendar quarter in order to allow sufficient time for the letters to be prepared, forwarded to the Board Members for signature, and then forwarded to FS. (Congratulatory letters for annuitants residing in foreign countries are forwarded to the appropriate U.S. Consulate office for delivery.) Before forwarding a letter to the Board Members for signature, staff in the Bureau of Actuary will check to determine that the annuitant has not died since the quarterly program run.

155.10.15 Field Service (FS) Responsibilities

Field offices are required to personally contact annuitants when they attain 100 years old, either in a home visit if the annuitant does not reside in an accredited nursing home, or in a telephone call if the annuitant resides in an accredited nursing home. (Field offices may mail centenarian letters to annuitants who reside in accredited nursing homes.) Contact is usually made in the month the annuitant turns age 100. However, allowances are made if the annuitant lives in an area that is not regularly serviced by a field office. In that case, the contact may be made in a month near the month of attainment of 100 years.

Control and assignment of the centenarian contact cases is done through FS. Each year, FS receives a listing, broken down by field office, of annuitants who will be attaining 100 years old in the upcoming year. FS distributes this listing to the Network Managers, who in turn distribute it to the district offices in their respective networks. A few months before the annuitant reaches 100, a letter signed by each of the Board members is sent to FS, which then forwards it to the appropriate field office. If possible, the field office arranges the visit in advance and tries to schedule the visit in the month the annuitant attains age 100. When a personal visit cannot be made in the month of attainment of 100 years old, a personal contact is made in either the preceding or following two months; the letter itself is mailed in the month of attainment of 100 years.

If an office is unable to contact the annuitant, they are to conduct the usual investigation, which may include a personal visit to the address on record, interviews with relatives and checks of various public records, to either locate the annuitant or determine if the annuitant is deceased. All these actions are reported on the FS shared drive by the District Managers.



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155.15 Centenarian Letter Contacts

RRB policy is to make personal contact with all centenarian annuitants. The ideal method is to personally deliver the congratulatory letter from the Board to those annuitants that do not reside in an accredited nursing home or call those annuitants that do reside in an accredited nursing home (after mailing the centenarian letter) on the centenarian's birthday. However, as it may not be possible to schedule such a visit or make such a telephone call, the claims representative should attempt to deliver the centenarian letter or call during the month the annuitant attains age 100. After checking DATAQ to confirm that the annuitant is in pay status and still resides in their service area, the field office should contact the centenarian or his/her family by phone or mail in order to set up an appointment for the personal contact.

155.15.05 Field Office Unable to Schedule Visit During the Birthday Month

If the field office is unable to schedule the centenarian letter visit to annuitants that do not reside in accredited nursing homes during the month the annuitant attains age 100, a visit/delivery during the two months before or after the annuitant attains age 100 is acceptable. Under the circumstances, the field office should mail the letter to the annuitant. If the centenarian letter is mailed, a subsequent personal contact with the annuitant is required. This contact should be made no later than the end of the month following the age 100 birthday month. For those cases that will not be completed by the end of the month following the age 100 month, advise FS as to the reason for the delay and the expected date of personal contact.

155.15.10 Centenarian Contact Problems/Issues

During the scheduling and contact process, field offices may encounter various situations that make the delivery of the congratulatory letter or the personal contact with the annuitant difficult. A description of these situations and handling instructions follow:

Centenarian resides in an accredited nursing home -- If the district manager determines that the annuitant lives in an accredited nursing home as defined in FOM 155.05, the letter may be mailed. A telephone contact should be made with the annuitant in order to determine the state of his/her health, welfare, and capability of handling his/her benefit. Third party corroboration of the annuitant's health, welfare and capability should be obtained, if possible. Potential third party sources to utilize when checking on the annuitant's health, welfare, and capability are:

- Annuitant's Medicare usage,



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- Annuitant's treating physician,
- Annuitant's family,
- Annuitant's nursing home administrator.

Centenarian alleges that he/she is not age 100 -- Obtain a statement from the annuitant or his/her representative as to the alleged date of birth and any documentary evidence supporting the alleged date of birth. Forward this material to FS. If you need another centenarian letter prepared, e.g. the annuitant is age 100 in 2011 instead of 2010, include this need in your submission.

Centenarian does not reside in your territory – If the annuitant has moved since the creation of the congratulatory letter or if the letter is addressed to the annuitant's representative payee who resides in your territory while the annuitant does not, the field office should transfer the letter and required personal contact assignment to the field office with jurisdiction. Both the transferring field office and the receiving field office should notify FS of the transfer and receipt of same.

Centenarian resides in a dangerous area – If the district manager determines that the annuitant lives in an area that is too dangerous to personally deliver the congratulatory letter, the letter may be mailed. A telephone contact should be made with the annuitant in order to determine state of his/her health, welfare, and capability of handling his/her benefit. Third party corroboration of the annuitant's health, welfare and capability should be obtained, if possible. A good third party source is the annuitant's treating physician. After completion of the party investigation, the field office should make a report of the dangerous area and the party confirmation contact to the Office of Inspector General (OIG), with a copy of the OIG referral report to FS.

Centenarian cannot be located – If the field office has exhausted their efforts and the annuitant still cannot be located, suspend benefit payments and refer the case to the OIG for investigation. The OIG referral should be made no later than 60 days after the age 100 birthday. The field office should include a report on the efforts to locate the annuitant in the OIG referral and also provide FS with a copy of the OIG referral.

Centenarian resides in Alaska, Hawaii, or Canada – Since itinerant service to Alaska and Hawaii is conducted on an annual or biennial basis, field offices with Alaska or Hawaii jurisdiction should request Congressional office or Social Security Administration office help, as needed, in order to deliver the congratulatory letter to annuitants in these states in a timely fashion. Similarly, with sporadic itinerant service in Canada, field offices with Canadian jurisdiction may not be able to deliver the congratulatory letter



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timely. If assistance in delivering the letter to an annuitant residing in Canada is needed, the field office should refer the case to FS for forwarding to the U.S. Consulate for delivery.