

PAUMA VALLEY COMMUNITY SERVICES DISTRICT

33129 Cole Grade Road
Pauma Valley, CA 92061
PHONE: (760) 742-1909 | FAX: (760) 742-1588

**REGULAR MEETING
SUPPLEMENTAL MATERIALS PACKET**

DATE: Monday, November 25th, 2024

TIME: 10:00 AM – **Open Session**

VENUE: Board Room, Pauma Valley Community Services District
33129 Cole Grade Road, Pauma Valley, Pauma Valley, CA 92061

Pauma Valley Community Services District Mission

“The mission of the Pauma Valley Community Services District is to protect the public health and environment of its community by providing effective wastewater management and stormwater drainage control, life safety assistance, security services, and exceptional customer care.”

PAUMA VALLEY COMMUNITY SERVICES DISTRICT
Minutes of a Regular Meeting of the Board of Directors

Held on Sept 23rd, 2024

Directors Present: Michael Esparza, Larry Curtis & Richard Collins
Directors Absent: Roland Skumawitz
Also Present: Resident Lolo Levy, Charles Mathews, Jeff Morris of DPMC, General Manager Eric Steinlicht, and Office Manager Marissa Fehling

1. Call to Order: Regular Meeting was called to order at 10:21 a.m. by Vice President Esparza.
2. Pledge of Allegiance: The Pledge of Allegiance was led by Esparza.
3. Roll Call: Fehling verified that a quorum was present.
4. Public Comment Period:
No public comments were made.

--CLOSED SESSION--

5. The Board of Directors Will Meet in a Closed Session to Discuss
 - A. **CONFERENCE WITH LEGAL COUNSEL**
Existing Litigation
Pursuant to Government Code Section 54956.9(d)(1)
Rancho Pauma Mutual Water Company vs Pauma Valley Community Services District
(San Diego Superior Court Case No. 37-2023-00038164-CU-BC-NC)

The Board proceeded into closed session at 10:22 a.m.

6. Open Session
 - A. Reportable Actions

The meeting was resumed in open session at 10:38 a.m. with no reportable actions:

--CONSENT ITEMS--

Items 7-16 appearing on the Consent Calendar may be voted on by single motion. Items shall be removed from the Consent Calendar if any member of the Board of Directors, or the public, requests removal prior to a vote on a motion to approve the items. Such items removed will be considered separately for action by the Board.

7. Minutes of the Regular Board Meeting July 22nd, 2024
8. Minutes of Special Board Meeting on August 19th, 2024
9. Review of Balance Sheet, Revenue and Expense Report
10. Accounts Receivable Report
11. PVCSD Security Report
12. Professional Services Agreement and Amendment with Carollo Engineers
13. Professional Services Agreement with Hansford Economic Consulting LLC
14. Contract for Deposit of Monies with Five Star Bank
15. Conflict of Interest Code Biennial Review
16. Memorandum of Understanding, Lease Agreement, Addendum and Amendment to the Lease Agreement, and Tolling Agreement between the District and Rancho Pauma Mutual Water Company (RPMWC)

Mathews requested that item 9 be pulled for further discussion. Levy requested to have items 9 and 10 pulled for further discussion. Curtis noted a correction to the July 22nd, 2024 Regular Meeting Minutes. Upon a motion by Curtis, seconded by Collins, and a unanimous vote, items 7-8, and 10-16 were approved as presented. Mathews raised concerns regarding the financial statements, noting that depreciation was not reflected and

indicating the District is currently operating in a deficit. Esparza responded, mentioning that the ongoing Cost-of-Service analysis would address these concerns. Levy commented on the Aging Report totals, and Fehling clarified that the report was run to date. Upon a motion by Curtis, seconded by Collins, and a unanimous vote, item 9 was approved as presented.

--DISCUSSION ITEM--

17. Storm Drainage Systems Updates – General Manager Steinlicht
Steinlicht provided an update on ongoing storm drainage matters.
18. District Banking Relationship Update – General Manager Steinlicht
Steinlicht informed that the District has opened a new account with Five Star Bank.
19. Solar Project Update- General Manager Steinlicht
Steinlicht provided a brief update on the Solar Project.
20. Strategic Planning Update- General Manager Steinlicht
Collins recommended postponing the start of the Strategic Planning process until the newly elected Board members are seated. Esparza suggested adding this item to the agenda for the next Board Meeting to ensure timely planning.
21. New Security Service: Extended Resident Leave Enhanced Patrol Request- General Manager Steinlicht
Steinlicht informed the Board that this topic had been previously brought to his attention by Esparza and provided a brief explanation of how the added security service feature operates.

--ACTION ITEMS--

22. New Payment Method for District Constituents
The Board of Directors will consider authorizing the General Manager to provide an additional method of payment to District constituents via Automated Clearing House (ACH) transactions.

Staff Recommendation:

1. Authorize the General Manager to implement a new ACH payment method.
2. Discuss and take other action as appropriate.

Esparza explained that the staff researched the possibility of offering Automated Clearing House (ACH) payment options for Pauma Valley Community Services District (PVCSD) customer. Fehling provided additional details on the proposed payment method. Curtis moved to authorize the General Manager to implement a new ACH payment method, seconded by Collins and unanimously approved.

23. Halloween Event Authorization and Logistics at the Pauma Valley Country Club Estates 2024
The Board of Directors will consider authorizing a guest entry Halloween event for the Pauma Valley Country Club Estates.

Staff Recommendation:

1. Discuss and take other action as appropriate.

Collins moved to authorize staff to permit guests to enter the Pauma Valley Country Club Estates Halloween trick-or-treating, in accordance with the guidelines discussed, seconded by Curtis, and unanimously approved.

24. Employee Handbook Revisions

The Board of Directors will consider approving the Employee Handbook revisions as recommended by staff to enhance understanding of District policy amongst all staff.

Staff Recommendation:

1. Approve the proposed Employee Handbook revisions.
2. Discuss and take other action as appropriate

Steinlicht provided the updates made. Collins moved to approve and adopt the revised Employee Handbook, seconded by Esparza and unanimously approved.

25. SmartCover Systems Maintenance Hole Installation

The Board of Directors will consider authorizing the General Manager to purchase a single SmartCover device to monitor a critical high liability location.

Staff Recommendation:

1. Authorize the General manager to purchase a SmartCover device.
2. Discuss and take other action as appropriate.

Steinlicht outlined the benefits of installing a SmartCover device in a high-liability location and provided a detailed explanation supporting the recommendation. Esparza suggested including the cost of a SmartCover device in future budgets as necessary. Collins requested a performance update on the device prior to budgeting for it in the next fiscal year. Esparza moved to authorize the General Manager to purchase a SmartCover device, seconded by Curtis and unanimously approved.

--INFORMATIONAL ITEMS--

26. General Manager's Report

Steinlicht provided the General Manager's Report.

27. Miscellaneous Items

A. Requested items for future agendas (**Directors and Staff Only**)

a) Salary and Total Compensation Study-

Esparza explained findings that were provided by previous Board Members.

b) Critical Spare Part Inventory Replacement Program CMMS

B. Board Comments-

Esparza requested that the next Agenda include an item regarding LAFCO. Collins informed he would like to make sure Vendor RFIDs are being updated as necessary. Collins commended the General Manager and staff for their excellent performance in service to the District.

C. Announcements- None

D. **Next Regular Meeting of the Board:**

- a) Monday, November 25, 2024, at 10 AM

28. Adjournment

With nothing further to discuss, a motion was made by Collins to adjourn at 12:05 pm, seconded by Curtis, and unanimously approved.

Marissa Fehling

Marissa Fehling, Recording Secretary

PAUMA VALLEY COMMUNITY SERVICES DISTRICT
Minutes of a Special Meeting of the Board of Directors

Held on October 28th, 2024

Directors Present: Roland Skumawitz, Michael Esparza, Larry Curtis & Richard Collins
Also Present: Resident Ashley Bolado, Charlene Bolado, Charles Mathews, Jeff Morris of DPMC, General Manager Eric Steinlicht, and Office Manager Marissa Fehling

1. Call to Order: Special Meeting was called to order at 3:05 p.m. by President Skumawitz.
2. Pledge of Allegiance: The Pledge of Allegiance was led by Curtis.
3. Roll Call: Fehling verified that a quorum was present.
4. Public Comment Period:
Charlene Bolado addressed the Board regarding a plumbing/sewer lateral issue she has encountered. She stated that she is working to determine the party responsible for these lines. Ms. Bolado acknowledged the helpful information provided by the District General Manager but noted that ownership of the lines remains unclear.

--CLOSED SESSION--

5. The Board of Directors Will Meet in a Closed Session to Discuss
 - A. **CONFERENCE WITH LEGAL COUNSEL**
Potential /Threatened/ Anticipated Litigation
Significant Exposure to Litigation Pursuant to Government Code Section 54956.9 (b) (one (1) Matter)

The Board proceeded into closed session at 3:15 p.m.

6. Open Session
 - A. Reportable Actions

The meeting was resumed in open session at 3:35 p.m., and there were no reportable actions to be disclosed.

7. Adjournment
Skumawitz thanked the Board for all that had been accomplished in the last two years and thanked PVCSD staff for their untiring hard work under trying conditions. He then thanked Curtis for stepping forward at a time when the District needed a strong voice to fill an important void. Skumawitz thanked Collins and Esparza for their support as they worked to establish their CSD as a properly run public agency. He wished all to accelerate forward, noting that a CSD cannot be run by volunteers and requires the professional attention that Steinlicht and his staff provide as well as the ancillary help we've received from our consultants. Skumawitz thanked everyone for the time spent together and wished everyone a journey that leads to even greater accomplishments ahead. With nothing further to discuss, a motion was made by Esparza to adjourn at 3:50 p.m., seconded by Curtis, and unanimously approved.

Marissa Fehling

Marissa Fehling, Recording Secretary

Pauma Valley Community Services District
Balance Sheet (Unaudited)
As of September 30, 2024

1	ASSETS		
2	Cash/Investment		
3	Checking	\$	327,073
4	LAIF		647
5	Petty Cash		368
6	LAIF Fair Market Value		(8)
7	Total Cash/Investments		328,080
8	Accounts Receivable		
9	Dues Receivable		9,641
10	Accounts Receivable Other		2,207
11	Accounts Receivable		25
12	Total Accounts Receivable		11,873
13	Other Current Assets		
14	Due from RPMWC		21,908
15	Allowance Account		4,944
16	Interest Receivable		198
17	Prepaid Insurance		15,326
18	Prepaid Solar Rooftop Lease		22,250
19	Undeposited Funds		4,511
20	Total Other Current Assets		69,137
21	Fixed Assets, Net		2,452,737
22	Other Assets		
23	Investment in USLRGMA		(6,446)
24	Deferred Outflows - Pension		1,224,393
25	Total Other Assets		1,217,947
26	TOTAL ASSETS	\$	4,079,774
27			
28	LIABILITIES		
29	Current Liabilities		
30	Accounts Payable	\$	16,012
31	PERS Vacation Liability		-
32	Accrued Expenses		1,056
33	Accrued Payroll		29,710
34	Accrued Federal Payroll Taxes		2,198
35	Accrued State Payroll Taxes		438
36	Accrued Retirement		2,397
37	Payroll Liabilities		(191)
38	Direct Deposit Liabilities		(132)
39	Compensated Absences		23,106
40	Total Current Liabilities		74,594
41	Long Term Liabilities		
42	Net Pension		317,882
43	Deferred Inflows - Pensions		1,576,071
44	Total Long Term Liabilities		1,893,953
45	TOTAL LIABILITIES		1,968,547
46	Fund Balance		
47	Retained Earnings		2,121,667
48	Net Income		(10,439)
49	Total Fund Balance		2,111,228
50	TOTAL LIABILITIES & FUND BALANCE	\$	4,079,774

Pauma Valley Community Services District
Statement of Revenues and Expenses (Unaudited)
For Period Ending September 30, 2024

	A	B	C	D	E
	September 2024 Month to Date Actuals	FY 25 YTD Actuals	FY 25 Adopted Budget	\$ Budget Variance	% Budget Variance
1 REVENUE					
2 Sewer Charges	\$ 36,765	\$ 131,732	\$ 565,198	\$ 433,466	23%
3 Security Patrol Charges	53,004	160,123	636,053	475,930	25%
4 Property Tax	1,868	4,537	136,774	132,237	3%
5 Interest	3	16	-	(16)	0%
6 RPMWC Lease	2,500	7,500	30,000	22,500	100%
7 Admin Services	100	450	-	(450)	0%
8 Other Revenue	841	8,053	8,520	467	95%
9 Security Gate Charge	42,983	128,948	515,790	386,843	25%
10 TOTAL REVENUE	138,064	441,358	1,892,335	1,450,977	329%
11 EXPENSE					
12 Salaries and Benefits					
13 Salaries	61,832	218,281	787,000	568,719	28%
14 Health Insurance	7,939	23,302	108,600	85,298	21%
15 Payroll Taxes	4,730	16,302	63,168	46,866	26%
16 PERS	6,108	20,444	69,200	48,756	30%
17 Uniforms	380	631	2,650	2,019	24%
18 Workers' Comp. Ins	4,366	4,366	23,220	18,854	19%
19 Total Salaries & Benefits	85,356	283,327	1,053,838	770,511	272%
20 Operations & Administrative Expenses					
21 Dwelling Live	744	2,233	8,900	6,667	25%
22 Electricity	5,744	18,186	59,570	41,384	31%
23 Liability Insurance	3,768	14,921	58,200	43,279	26%
24 Miscellaneous	(607)	382	3,500	3,118	11%
25 Telephones	1,214	2,361	15,200	12,839	16%
26 Postage	1,046	1,632	4,900	3,268	33%
27 Operator Contract Services	7,700	23,100	92,400	69,300	25%
28 Oak Tree Repair & Maint.	-	3,465	5,000	1,535	69%
29 Sewer line maintenance	3,159	8,053	35,000	26,947	23%
30 Sludge Removal	-	4,200	54,600	50,400	8%
31 SCADA Maintenance	-	-	-	-	0%
32 Plant Repairs & Maintenance - Other	9,442	17,237	20,000	2,763	86%
33 Building Repairs & Maintenance	1,496	3,128	20,000	16,872	16%
34 Airpark maintenance	225	225	1,000	775	23%
35 Gate Repairs & Maintenance	2,870	3,543	37,600	34,057	9%
36 Repairs & Maintenance - Other	-	-	-	-	0%
37 Office Supplies	1,647	8,782	27,100	18,318	32%
38 Utility Shop Supplies	255	813	1,000	187	81%
39 Security Supplies	64	469	1,280	811	37%
40 Gate Supplies	339	1,318	2,300	982	57%
41 Vehicles	1,342	4,944	16,400	11,456	30%
42 Drainage	750	5,794	12,000	6,206	48%
43 State Maint. Fee	-	-	31,000	31,000	0%
44 Water Tests & Analysis	1,414	1,724	12,400	10,676	14%
45 Fees	-	2,562	9,500	6,939	27%
46 Engineering	-	3,419	30,000	26,581	11%
47 Professional Services	4,986	6,756	44,500	37,744	15%
48 Pre-employment Gates	-	-	300	300	0%
49 Schools & Meetings	1,535	3,669	13,000	9,331	28%
50 Long Term Financial Plan	-	-	-	-	0%
51 Audit	-	5,700	10,500	4,800	54%
52 Accounting	3,122	4,989	54,000	49,011	9%
53 Legal	4,525	14,477	57,000	42,523	25%
54 SGMA Technical Study	-	387	-	(387)	0%
55 Guard Houses /Roadway Lease	-	2	2	-	100%
56 Contingency	-	-	25,000	25,000	0%
57 Total Operations & Admin Expenses	56,779	168,470	763,152	594,682	22%
58 TOTAL EXPENSE	142,136	451,797	1,816,990	1,365,193	25%
59 NET REVENUE / (EXPENSE) BEFORE CAPITAL	\$ (4,072)	\$ (10,439)	\$ 75,344	\$ 85,783	-14%

Pauma Valley Community Services District

Vendor Check Payments over 5k

September-2024

Vendor	Type	Date	Memo	Account	Amount
California Choice	Bill Pmt -Check	09/05/2024	Health Ins Group #51394- October	102 · Checking	-8,698.21
CRWRMA	Bill Pmt -Check	09/30/2024	Liability Ins 24-25	102 · Checking	-7,480.75
DPMC	Bill Pmt -Check	09/12/2024		102 · Checking	-5,601.80
SDG&E	Bill Pmt -Check	09/25/2024	Aug 21- Sept 19- 2024	102 · Checking	-6,722.51
Southern Contracting Co.	Bill Pmt -Check	09/30/2024		102 · Checking	-8,825.00
Water Quality Specialists	Bill Pmt -Check	09/03/2024	August-2024	102 · Checking	-7,700.00

Pauma Valley Community Services District
Balance Sheet (Unaudited)
As of October, 2024

1	ASSETS		
2	Cash/Investment		
3	Checking	\$	324,340
4	LAIF		654
5	Petty Cash		368
6	LAIF Fair Market Value		(8)
7	Total Cash/Investments		325,354
8	Accounts Receivable		
9	Dues Receivable		29,984
10	Accounts Receivable Other		2,207
11	Accounts Receivable		25
12	Total Accounts Receivable		32,216
13	Other Current Assets		
14	Due from RPMWC		22,179
15	Interest Receivable		198
16	Allowance Account		4,944
17	Prepaid Insurance		20,109
18	Prepaid Solar Rooftop Lease		22,250
19	Undeposited Funds		351
20	Total Other Current Assets		70,031
21	Fixed Assets, Net		2,459,730
22	Other Assets		
23	Investment in USLRGMA		(6,446)
24	Deferred Outflows - Pension		1,224,393
25	Total Other Assets		1,217,947
	TOTAL ASSETS	\$	4,105,278
26	LIABILITIES		
27	Current Liabilities		
28	Accounts Payable	\$	17,955
29	PERS Vacation Liability		-
30	Accrued Expenses		1,056
31	Accrued Payroll		29,710
32	Accrued Federal Payroll Taxes		2,198
33	Accrued State Payroll Taxes		169
34	Accrued Retirement		2,149
35	Payroll Liabilities		(191)
36	Direct Deposit Liabilities		(132)
37	Compensated Absences		23,106
38	Total Current Liabilities		76,020
39	Long Term Liabilities		
40	Net Pension		317,882
41	Deferred Inflows - Pensions		1,576,071
42	Total Long Term Liabilities		1,893,953
43	TOTAL LIABILITIES		1,969,973
44	Fund Balance		
45	Retained Earnings		2,121,667
46	Net Income		13,639
47	Total Fund Balance		2,135,306
	TOTAL LIABILITIES & FUND BALANCE	\$	4,105,278

Pauma Valley Community Services District
Statement of Revenues and Expenses (Unaudited)
For Period Ending October 31, 2024

	A	B	C	D	E
	October 2024 Month to Date Actuals	FY 25 YTD Actuals	FY 25 Adopted Budget	\$ Budget Variance	% Budget Variance
1 REVENUE					
2 Sewer Charges	\$ 47,484	\$ 179,216	\$ 565,198	\$ 385,982	32%
3 Security Patrol Charges	53,004	213,127	636,053	422,926	34%
4 Property Tax	3,441	7,978	136,774	128,796	6%
5 Interest	9	25	-	(25)	0%
6 RPMWC Lease	2,500	10,000	30,000	20,000	100%
7 Admin Services	30	480	-	(480)	0%
8 Other Revenue	1,626	9,678	8,520	(1,158)	114%
9 Security Gate Charge	42,983	171,930	515,790	343,860	33%
10 TOTAL REVENUE	151,076	592,434	1,892,335	1,299,901	219%
11 EXPENSE					
12 Salaries and Benefits					
13 Salaries	61,013	279,294	787,000	507,706	35%
14 Health Insurance	7,251	30,553	108,600	78,047	28%
15 Payroll Taxes	4,622	20,924	63,168	42,244	33%
16 PERS	5,902	26,346	69,200	42,854	38%
17 Uniforms	50	681	2,650	1,969	26%
18 Workers' Comp. Ins	2,183	6,549	23,220	16,671	28%
19 Total Salaries & Benefits	81,020	364,347	1,053,838	689,491	189%
20 Operations & Administrative Expenses					
21 Dwelling Live	782	3,015	8,900	5,885	34%
22 Electricity	5,750	23,936	59,570	35,634	40%
23 Liability Insurance	3,768	18,689	58,200	39,511	32%
24 Miscellaneous	92	474	3,500	3,026	14%
25 Telephones	593	2,954	15,200	12,246	19%
26 Postage	-	1,632	4,900	3,268	33%
27 Operator Contract Services	7,700	30,800	92,400	61,600	33%
28 Oak Tree Repair & Maint.	-	3,465	5,000	1,535	69%
29 Sewer line maintenance	212	8,265	35,000	26,735	24%
30 Sludge Removal	-	4,200	54,600	50,400	8%
31 SCADA Maintenance	-	-	-	-	0%
32 Plant Repairs & Maintenance - Other	769	18,006	20,000	1,994	90%
33 Building Repairs & Maintenance	627	3,755	20,000	16,245	19%
34 Airpark maintenance	-	225	1,000	775	23%
35 Gate Repairs & Maintenance	1,571	5,113	37,600	32,487	14%
36 Repairs & Maintenance - Other	-	-	-	-	0%
37 Office Supplies	3,361	12,143	27,100	14,957	45%
38 Utility Shop Supplies	103	916	1,000	84	92%
39 Security Supplies	1,352	1,821	1,280	(541)	142%
40 Gate Supplies	977	2,295	2,300	5	100%
41 Vehicles	1,965	6,909	16,400	9,491	42%
42 Drainage	2,000	7,794	12,000	4,206	65%
43 State Maint. Fee	-	-	31,000	31,000	0%
44 Water Tests & Analysis	483	2,207	12,400	10,193	18%
45 Fees	9,311	11,873	9,500	(2,373)	125%
46 Engineering	-	3,419	30,000	26,581	11%
47 Professional Services	2,020	8,776	44,500	35,724	20%
48 Pre-employment Gates	39	39	300	261	13%
49 Schools & Meetings	1,192	4,860	13,000	8,140	37%
50 Long Term Financial Plan	-	-	-	-	0%
51 Audit	-	5,700	10,500	4,800	54%
52 Accounting	-	4,989	54,000	49,011	9%
53 Legal	1,313	15,790	57,000	41,210	28%
54 SGMA Technical Study	-	387	-	(387)	0%
55 Guard Houses /Roadway Lease	-	2	2	-	100%
56 Contingency	-	-	25,000	25,000	0%
57 Total Operations & Admin Expenses	45,978	214,448	763,152	548,704	28%
58 TOTAL EXPENSE	126,999	578,795	1,816,990	1,238,195	32%
59 NET REVENUE / (EXPENSE) BEFORE CAPITAL	\$ 24,078	\$ 13,639	\$ 75,344	\$ 61,705	18%

Pauma Valley Community Services District

Vendor Check Payments over 5k

October - 2024

Vendor	Type	Date	Memo	Account	Amount
California Choice	Bill Pmt -Check	10/03/2024	Health Ins Group #51394- November	105 · FS Checking	-8,043.23
California Special Districts Association	Bill Pmt -Check	10/29/2024	Mbr # 213	105 · FS Checking	-6,858.00
Hadronex, Inc. DBA SmartCover Systems	Bill Pmt -Check	10/14/2024		105 · FS Checking	-6,104.66
SDG&E	Bill Pmt -Check	10/28/2024	Sept 20- Oct 21- 2024	105 · FS Checking	-6,731.74
Visa Bankcard	Bill Pmt -Check	10/23/2024		105 · FS Checking	-5,582.32
Water Quality Specialists	Bill Pmt -Check	10/03/2024	Sept -2024	105 · FS Checking	-7,700.00

PV COMMUNITY SERVICES DISTRICT

A/R Aging Summary

As of September 30, 2024

	<u>Current</u>	<u>1 - 60</u>	<u>61 - 120</u>	<u>121 - 180</u>	<u>> 180</u>	<u>TOTAL</u>
CSD-001	0.00	-10,719.12	0.00	0.00	0.00	-10,719.12
CSD-002	0.00	-661.74	-661.74	-330.87	-1,270.07	-2,924.42
CSD-003	-351.41	-702.41	-1,847.39	0.00	0.00	-2,901.21
CSD-004	0.00	-1,359.29	0.00	0.00	0.00	-1,359.29
CSD-005	0.00	-606.00	-497.20	0.00	0.00	-1,103.20
CSD-006	0.00	-967.61	0.00	0.00	0.00	-967.61
CSD-007	0.00	0.00	0.00	0.00	-905.99	-905.99
CSD-008	0.00	-661.74	-92.42	0.00	0.00	-754.16
CSD-009	0.00	-702.82	0.00	0.00	0.00	-702.82
CSD-010	0.00	-702.82	0.00	0.00	0.00	-702.82
CSD-011	0.00	-667.28	0.00	0.00	0.00	-667.28
CSD-012	0.00	-616.20	0.00	0.00	0.00	-616.20
CSD-013	0.00	-591.07	0.00	0.00	0.00	-591.07
CSD-014	0.00	-563.22	0.00	0.00	0.00	-563.22
CSD-015	0.00	-538.56	0.00	0.00	0.00	-538.56
CSD-016	0.00	0.00	0.00	-514.74	0.00	-514.74
CSD-017	0.00	-437.37	0.00	0.00	0.00	-437.37
CSD-018	0.00	0.00	-435.12	0.00	0.00	-435.12
CSD-019	0.00	-402.95	0.00	0.00	0.00	-402.95
CSD-020	0.00	-388.65	0.00	0.00	0.00	-388.65
CSD-021	0.00	-351.84	0.00	0.00	0.00	-351.84
CSD-022	0.00	-351.78	0.00	0.00	0.00	-351.78
CSD-023	0.00	-351.41	0.00	0.00	0.00	-351.41
CSD-024	0.00	-351.41	0.00	0.00	0.00	-351.41
CSD-025	0.00	-351.41	0.00	0.00	0.00	-351.41
CSD-026	0.00	-351.41	0.00	0.00	0.00	-351.41
CSD-027	0.00	-351.41	0.00	0.00	0.00	-351.41
CSD-028	0.00	-351.41	0.00	0.00	0.00	-351.41
CSD-029	0.00	-351.41	0.00	0.00	0.00	-351.41
CSD-030	-351.41	0.00	0.00	0.00	0.00	-351.41
CSD-031	0.00	-351.41	0.00	0.00	0.00	-351.41
CSD-032	0.00	0.00	0.00	-316.70	-33.30	-350.00
CSD-033	0.00	0.00	-331.64	0.00	0.00	-331.64
CSD-034	0.00	-331.43	0.00	0.00	0.00	-331.43
CSD-035	0.00	-330.87	0.00	0.00	0.00	-330.87
CSD-036	0.00	-330.87	0.00	0.00	0.00	-330.87
CSD-037	0.00	-330.87	0.00	0.00	0.00	-330.87
CSD-038	0.00	-320.95	0.00	0.00	0.00	-320.95
CSD-039	0.00	-320.51	0.00	0.00	0.00	-320.51
CSD-040	0.00	-316.07	0.00	0.00	0.00	-316.07

	<u>Current</u>	<u>1 - 60</u>	<u>61 - 120</u>	<u>121 - 180</u>	<u>> 180</u>	<u>TOTAL</u>
CSD-041	0.00	0.00	-300.27	0.00	0.00	-300.27
CSD-042	0.00	-276.60	0.00	0.00	0.00	-276.60
CSD-043	0.00	-275.87	0.00	0.00	0.00	-275.87
CSD-044	-244.45	0.00	0.00	0.00	0.00	-244.45
CSD-045	0.00	-236.79	0.00	0.00	0.00	-236.79
CSD-046	0.00	-230.95	0.00	0.00	0.00	-230.95
CSD-047	0.00	-203.16	0.00	0.00	0.00	-203.16
CSD-048	0.00	-172.33	0.00	0.00	0.00	-172.33
CSD-049	0.00	0.00	0.00	0.00	-160.00	-160.00
CSD-050	-149.40	0.00	0.00	0.00	0.00	-149.40
CSD-051	0.00	-149.25	0.00	0.00	0.00	-149.25
CSD-052	0.00	-75.06	0.00	0.00	0.00	-75.06
CSD-053	0.00	0.00	0.00	0.00	-48.00	-48.00
CSD-054	0.00	-20.76	0.00	0.00	0.00	-20.76
CSD-055	0.00	-20.00	0.00	0.00	0.00	-20.00
CSD-056	0.00	-14.68	0.00	0.00	0.00	-14.68
CSD-057	0.00	-12.33	0.00	0.00	0.00	-12.33
CSD-058	0.00	0.00	-12.28	0.00	0.00	-12.28
CSD-059	0.00	-9.46	0.00	0.00	0.00	-9.46
CSD-060	0.00	0.00	-2.78	0.00	0.00	-2.78
CSD-061	0.00	-1.37	0.00	0.00	0.00	-1.37
CSD-062	0.00	-1.00	0.00	0.00	0.00	-1.00
CSD-063	0.00	-0.98	0.00	0.00	0.00	-0.98
CSD-064	0.00	-0.59	0.00	0.00	0.00	-0.59
CSD-065	0.00	-0.25	0.00	0.00	0.00	-0.25
CSD-066	0.00	-0.02	0.00	0.00	0.00	-0.02
CSD-067	0.00	-0.02	0.00	0.00	0.00	-0.02
CSD-068	0.00	-0.01	0.00	0.00	0.00	-0.01
CSD-069	0.00	330.87	-330.87	0.00	0.00	0.00
CSD-070	0.00	0.00	0.00	0.00	0.00	0.00
CSD-071	0.00	0.00	0.00	0.00	0.00	0.00
CSD-072	0.00	0.00	0.00	0.00	0.00	0.00
CSD-073	0.00	0.00	0.00	0.00	0.00	0.00
CSD-074	0.00	0.20	0.00	0.00	0.00	0.20
CSD-075	0.00	0.41	0.00	0.00	0.00	0.41
CSD-076	0.00	10.76	0.00	0.00	0.00	10.76
CSD-077	0.00	11.87	0.00	0.00	0.00	11.87
CSD-078	0.00	0.00	0.00	0.00	11.87	11.87
CSD-079	0.00	12.00	0.00	0.00	0.00	12.00
CSD-080	0.00	12.88	0.00	0.00	0.00	12.88
CSD-081	0.00	14.13	0.00	0.00	0.00	14.13
CSD-082	0.00	15.00	0.00	0.00	0.00	15.00
CSD-083	0.00	15.00	0.00	0.00	0.00	15.00

	<u>Current</u>	<u>1 - 60</u>	<u>61 - 120</u>	<u>121 - 180</u>	<u>> 180</u>	<u>TOTAL</u>
CSD-084	0.00	15.45	0.00	0.00	0.00	15.45
CSD-085	0.00	20.48	0.00	0.00	0.00	20.48
CSD-086	0.00	20.53	0.00	0.00	0.00	20.53
CSD-087	0.00	-310.33	330.87	0.00	0.00	20.54
CSD-088	0.00	20.54	0.00	0.00	0.00	20.54
CSD-089	0.00	20.54	0.00	0.00	0.00	20.54
CSD-090	0.00	20.54	0.00	0.00	0.00	20.54
CSD-091	0.00	20.92	0.00	0.00	0.00	20.92
CSD-092	0.00	24.61	0.00	0.00	0.00	24.61
CSD-093	0.00	25.00	0.00	0.00	0.00	25.00
CSD-094	0.00	25.00	0.00	0.00	0.00	25.00
CSD-095	0.00	13.32	12.00	0.00	0.00	25.32
CSD-096	0.00	26.63	0.00	0.00	0.00	26.63
CSD-097	0.00	34.75	0.00	0.00	0.00	34.75
CSD-098	0.00	34.75	0.00	0.00	0.00	34.75
CSD-099	0.00	35.99	0.00	0.00	0.00	35.99
CSD-100	0.00	50.00	0.00	0.00	0.00	50.00
CSD-101	0.00	50.81	0.00	0.00	0.00	50.81
CSD-102	0.00	52.81	0.00	0.00	0.00	52.81
CSD-103	0.00	61.62	0.00	0.00	0.00	61.62
CSD-104	0.00	61.62	0.00	0.00	0.00	61.62
CSD-105	0.00	65.54	0.00	0.00	0.00	65.54
CSD-106	0.00	74.67	0.00	0.00	0.00	74.67
CSD-107	0.00	80.42	0.00	0.00	0.00	80.42
CSD-108	100.00	0.00	0.00	0.00	0.00	100.00
CSD-109	0.00	106.96	0.00	0.00	0.00	106.96
CSD-110	0.00	115.36	0.00	0.00	0.00	115.36
CSD-111	0.00	25.73	27.53	27.25	66.06	146.57
CSD-112	0.00	25.74	27.55	27.27	68.02	148.58
CSD-113	0.00	166.62	0.00	0.00	0.00	166.62
CSD-114	0.00	216.00	0.00	0.00	0.00	216.00
CSD-115	0.00	236.79	0.00	0.00	0.00	236.79
CSD-116	0.00	236.79	0.00	0.00	0.00	236.79
CSD-117	0.00	236.79	0.00	0.00	0.00	236.79
CSD-118	0.00	236.79	0.00	0.00	0.00	236.79
CSD-119	0.00	294.22	0.00	0.00	0.00	294.22
CSD-120	0.00	330.87	0.00	0.00	0.00	330.87
CSD-121	0.00	330.87	0.00	0.00	0.00	330.87
CSD-122	0.00	330.87	0.00	0.00	0.00	330.87
CSD-123	0.00	350.50	0.00	0.00	0.00	350.50
CSD-124	0.00	351.41	0.00	0.00	0.00	351.41
CSD-125	0.00	351.41	0.00	0.00	0.00	351.41
CSD-126	0.00	351.41	0.00	0.00	0.00	351.41

	<u>Current</u>	<u>1 - 60</u>	<u>61 - 120</u>	<u>121 - 180</u>	<u>> 180</u>	<u>TOTAL</u>
CSD-127	0.00	351.41	0.00	0.00	0.00	351.41
CSD-128	0.00	351.41	0.00	0.00	0.00	351.41
CSD-129	0.00	351.41	0.00	0.00	0.00	351.41
CSD-130	0.00	351.41	0.00	0.00	0.00	351.41
CSD-131	0.00	351.41	0.00	0.00	0.00	351.41
CSD-132	0.00	351.41	0.00	0.00	0.00	351.41
CSD-133	0.00	351.41	0.00	0.00	0.00	351.41
CSD-134	0.00	351.41	0.00	0.00	0.00	351.41
CSD-135	0.00	351.41	0.00	0.00	0.00	351.41
CSD-136	0.00	351.41	0.00	0.00	0.00	351.41
CSD-137	0.00	351.41	0.00	0.00	0.00	351.41
CSD-138	0.00	351.41	0.00	0.00	0.00	351.41
CSD-139	0.00	352.19	0.00	0.00	0.00	352.19
CSD-140	0.00	330.87	0.00	0.00	25.00	355.87
CSD-141	0.00	376.41	0.00	0.00	0.00	376.41
CSD-142	0.00	392.49	0.00	0.00	0.00	392.49
CSD-143	0.00	396.41	0.00	0.00	0.00	396.41
CSD-144	0.00	400.49	0.00	0.00	0.00	400.49
CSD-145	38.85	390.07	0.00	0.00	0.00	428.92
CSD-146	25.74	412.81	0.00	0.00	0.00	438.55
CSD-147	26.05	473.58	0.00	0.00	0.00	499.63
CSD-148	26.05	473.58	0.00	0.00	0.00	499.63
CSD-149	27.11	475.93	184.78	0.00	0.00	687.82
CSD-150	38.55	682.28	0.00	0.00	0.00	720.83
CSD-151	38.66	702.82	0.00	0.00	0.00	741.48
CSD-152	38.66	702.82	0.00	0.00	0.00	741.48
CSD-153	38.66	702.82	0.00	0.00	0.00	741.48
CSD-154	38.96	741.59	22.76	0.00	0.00	803.31
CSD-155	40.38	702.82	344.82	0.00	0.00	1,088.02
CSD-156	40.50	741.55	330.87	36.40	0.00	1,149.32
CSD-157	41.25	796.84	424.30	0.00	0.00	1,262.39
CSD-158	29.03	557.13	513.89	231.57	0.00	1,331.62
CSD-159	0.00	0.00	0.00	0.00	1,364.32	1,364.32
CSD-160	0.00	61.05	1,415.92	0.00	0.00	1,476.97
CSD-161	42.46	743.32	720.83	0.00	0.00	1,506.61
CSD-162	43.58	1,452.19	236.58	0.00	0.00	1,732.35
CSD-163	30.63	557.57	520.89	510.82	311.34	1,931.25
CSD-164	21.15	334.79	292.74	292.67	1,005.51	1,946.86
CSD-165	38.30	565.22	535.08	521.15	1,824.32	3,484.07
CSD-166	55.77	811.31	790.72	758.35	2,523.89	4,940.04
CSD-167	59.37	810.16	797.94	765.51	3,237.58	5,670.56
TOTAL	-216.96	-3,164.31	3,018.36	2,008.68	8,020.55	9,666.32

PV COMMUNITY SERVICES DISTRICT

A/R Aging Summary

As of October 31, 2024

	<u>Current</u>	<u>1 - 60</u>	<u>61 - 120</u>	<u>121 - 180</u>	<u>> 180</u>	<u>TOTAL</u>
CSD-001	0.00	-8,559.55	0.00	0.00	0.00	-8,559.55
CSD-002	0.00	-661.74	-330.87	-992.61	-918.66	-2,903.88
CSD-003	0.00	-702.82	-704.98	-1,493.41	0.00	-2,901.21
CSD-004	0.00	-702.82	-656.47	0.00	0.00	-1,359.29
CSD-005	0.00	-606.00	-448.79	0.00	0.00	-1,054.79
CSD-006	0.00	-682.28	-285.33	0.00	0.00	-967.61
CSD-007	0.00	-661.74	-71.88	0.00	0.00	-733.62
CSD-008	0.00	-705.60	0.00	0.00	0.00	-705.60
CSD-009	0.00	-702.82	0.00	0.00	0.00	-702.82
CSD-010	0.00	-702.82	0.00	0.00	0.00	-702.82
CSD-011	0.00	-702.82	0.00	0.00	0.00	-702.82
CSD-012	0.00	-667.28	0.00	0.00	0.00	-667.28
CSD-013	0.00	-655.41	0.00	0.00	0.00	-655.41
CSD-014	0.00	-595.66	0.00	0.00	0.00	-595.66
CSD-015	0.00	0.00	0.00	0.00	-554.58	-554.58
CSD-016	0.00	-542.68	0.00	0.00	0.00	-542.68
CSD-017	0.00	-437.37	0.00	0.00	0.00	-437.37
CSD-018	0.00	-402.95	0.00	0.00	0.00	-402.95
CSD-019	0.00	-241.00	-132.20	0.00	0.00	-373.20
CSD-020	0.00	-352.27	0.00	0.00	0.00	-352.27
CSD-021	0.00	-351.78	0.00	0.00	0.00	-351.78
CSD-022	0.00	-351.41	0.00	0.00	0.00	-351.41
CSD-023	0.00	-351.41	0.00	0.00	0.00	-351.41
CSD-024	0.00	-351.41	0.00	0.00	0.00	-351.41
CSD-025	0.00	-351.41	0.00	0.00	0.00	-351.41
CSD-026	0.00	-351.41	0.00	0.00	0.00	-351.41
CSD-027	0.00	-351.41	0.00	0.00	0.00	-351.41
CSD-028	0.00	-351.41	0.00	0.00	0.00	-351.41
CSD-029	-351.41	0.00	0.00	0.00	0.00	-351.41
CSD-030	0.00	-351.41	0.00	0.00	0.00	-351.41
CSD-031	0.00	-351.41	0.00	0.00	0.00	-351.41
CSD-032	0.00	0.00	0.00	0.00	-350.00	-350.00
CSD-033	-349.41	0.00	0.00	0.00	0.00	-349.41
CSD-034	0.00	-330.87	0.00	0.00	0.00	-330.87
CSD-035	0.00	-320.51	0.00	0.00	0.00	-320.51
CSD-036	-310.89	0.00	0.00	0.00	0.00	-310.89
CSD-037	0.00	-310.33	0.00	0.00	0.00	-310.33
CSD-038	0.00	-284.46	0.00	0.00	0.00	-284.46
CSD-039	0.00	-280.53	0.00	0.00	0.00	-280.53
CSD-040	0.00	-276.60	0.00	0.00	0.00	-276.60

	<u>Current</u>	<u>1 - 60</u>	<u>61 - 120</u>	<u>121 - 180</u>	<u>> 180</u>	<u>TOTAL</u>
CSD-041	0.00	-244.45	0.00	0.00	0.00	-244.45
CSD-042	0.00	-236.79	0.00	0.00	0.00	-236.79
CSD-043	0.00	-236.79	0.00	0.00	0.00	-236.79
CSD-044	0.00	-230.95	0.00	0.00	0.00	-230.95
CSD-045	0.00	0.00	-187.15	0.00	0.00	-187.15
CSD-046	0.00	0.00	0.00	0.00	-163.33	-163.33
CSD-047	0.00	-124.92	0.00	0.00	0.00	-124.92
CSD-048	0.00	-113.71	0.00	0.00	0.00	-113.71
CSD-049	0.00	-88.27	0.00	0.00	0.00	-88.27
CSD-050	0.00	0.00	0.00	-83.71	0.00	-83.71
CSD-051	0.00	-43.59	0.00	0.00	0.00	-43.59
CSD-052	0.00	-38.97	0.00	0.00	0.00	-38.97
CSD-053	-24.00	-12.00	0.00	0.00	0.00	-36.00
CSD-054	0.00	0.00	0.00	0.00	-36.00	-36.00
CSD-055	0.00	-25.00	0.00	0.00	0.00	-25.00
CSD-056	0.00	-20.00	0.00	0.00	0.00	-20.00
CSD-057	0.00	-12.87	0.00	0.00	0.00	-12.87
CSD-058	0.00	-12.33	0.00	0.00	0.00	-12.33
CSD-059	0.00	-9.46	0.00	0.00	0.00	-9.46
CSD-060	0.00	-1.15	0.00	0.00	0.00	-1.15
CSD-061	0.00	-1.00	0.00	0.00	0.00	-1.00
CSD-062	0.00	-0.96	0.00	0.00	0.00	-0.96
CSD-063	0.00	-0.59	0.00	0.00	0.00	-0.59
CSD-064	0.00	-0.02	0.00	0.00	0.00	-0.02
CSD-065	0.00	-0.02	0.00	0.00	0.00	-0.02
CSD-066	0.00	-0.01	0.00	0.00	0.00	-0.01
CSD-067	0.00	0.00	0.00	14.50	-14.50	0.00
CSD-068	0.00	0.00	0.00	0.00	0.00	0.00
CSD-069	0.00	0.00	0.00	0.00	0.00	0.00
CSD-070	0.00	0.01	0.00	0.00	0.00	0.01
CSD-071	0.00	0.20	0.00	0.00	0.00	0.20
CSD-072	0.00	0.27	0.00	0.00	0.00	0.27
CSD-073	0.00	0.41	0.00	0.00	0.00	0.41
CSD-074	0.00	0.41	0.00	0.00	0.00	0.41
CSD-075	0.00	0.41	0.00	0.00	0.00	0.41
CSD-076	0.00	10.76	0.00	0.00	0.00	10.76
CSD-077	0.00	0.00	0.00	0.00	11.87	11.87
CSD-078	0.00	11.87	0.00	0.00	0.00	11.87
CSD-079	0.00	12.00	0.00	0.00	0.00	12.00
CSD-080	0.00	12.88	0.00	0.00	0.00	12.88
CSD-081	0.00	15.00	0.00	0.00	0.00	15.00
CSD-082	0.00	15.00	0.00	0.00	0.00	15.00
CSD-083	0.00	20.45	0.00	0.00	0.00	20.45

	<u>Current</u>	<u>1 - 60</u>	<u>61 - 120</u>	<u>121 - 180</u>	<u>> 180</u>	<u>TOTAL</u>
CSD-084	0.00	20.54	0.00	0.00	0.00	20.54
CSD-085	0.00	-310.33	330.87	0.00	0.00	20.54
CSD-086	0.00	24.61	0.00	0.00	0.00	24.61
CSD-087	0.00	25.00	0.00	0.00	0.00	25.00
CSD-088	0.00	25.00	0.00	0.00	0.00	25.00
CSD-089	0.00	25.45	1.32	0.00	0.00	26.77
CSD-090	0.00	30.46	0.00	0.00	0.00	30.46
CSD-091	0.00	34.75	0.00	0.00	0.00	34.75
CSD-092	0.00	34.75	0.00	0.00	0.00	34.75
CSD-093	0.00	36.41	0.00	0.00	0.00	36.41
CSD-094	0.00	38.66	0.00	0.00	0.00	38.66
CSD-095	0.00	41.07	0.00	0.00	0.00	41.07
CSD-096	0.00	41.84	0.00	0.00	0.00	41.84
CSD-097	0.00	50.00	0.00	0.00	0.00	50.00
CSD-098	0.00	51.14	0.00	0.00	0.00	51.14
CSD-099	0.00	59.60	0.00	0.00	0.00	59.60
CSD-100	0.00	61.62	0.00	0.00	0.00	61.62
CSD-101	0.00	65.54	0.00	0.00	0.00	65.54
CSD-102	0.00	80.42	0.00	0.00	0.00	80.42
CSD-103	0.00	87.60	0.00	0.00	0.00	87.60
CSD-104	0.00	95.08	0.00	0.00	0.00	95.08
CSD-105	0.00	100.00	0.00	0.00	0.00	100.00
CSD-106	0.00	148.25	0.00	0.00	0.00	148.25
CSD-107	0.00	25.86	27.53	27.39	79.65	160.43
CSD-108	0.00	25.87	27.55	27.41	81.62	162.45
CSD-109	0.00	202.16	0.00	0.00	0.00	202.16
CSD-110	0.00	222.11	0.00	0.00	0.00	222.11
CSD-111	0.00	236.79	0.00	0.00	0.00	236.79
CSD-112	0.00	236.79	0.00	0.00	0.00	236.79
CSD-113	0.00	236.79	0.00	0.00	0.00	236.79
CSD-114	0.00	236.79	0.00	0.00	0.00	236.79
CSD-115	0.00	244.45	0.00	0.00	0.00	244.45
CSD-116	0.00	330.87	0.00	0.00	0.00	330.87
CSD-117	0.00	330.87	0.00	0.00	0.00	330.87
CSD-118	0.00	330.87	0.00	0.00	0.00	330.87
CSD-119	0.00	349.91	0.00	0.00	0.00	349.91
CSD-120	0.00	350.82	0.00	0.00	0.00	350.82
CSD-121	0.00	351.41	0.00	0.00	0.00	351.41
CSD-122	0.00	351.41	0.00	0.00	0.00	351.41
CSD-123	0.00	351.41	0.00	0.00	0.00	351.41
CSD-124	0.00	351.41	0.00	0.00	0.00	351.41
CSD-125	0.00	351.41	0.00	0.00	0.00	351.41
CSD-126	0.00	351.41	0.00	0.00	0.00	351.41

	<u>Current</u>	<u>1 - 60</u>	<u>61 - 120</u>	<u>121 - 180</u>	<u>> 180</u>	<u>TOTAL</u>
CSD-127	0.00	351.41	0.00	0.00	0.00	351.41
CSD-128	0.00	351.41	0.00	0.00	0.00	351.41
CSD-129	0.00	351.41	0.00	0.00	0.00	351.41
CSD-130	0.00	351.41	0.00	0.00	0.00	351.41
CSD-131	0.00	351.41	0.00	0.00	0.00	351.41
CSD-132	0.00	351.41	0.00	0.00	0.00	351.41
CSD-133	0.00	351.41	0.00	0.00	0.00	351.41
CSD-134	0.00	351.41	0.00	0.00	0.00	351.41
CSD-135	0.00	351.41	0.00	0.00	0.00	351.41
CSD-136	0.00	351.41	0.00	0.00	0.00	351.41
CSD-137	0.00	351.41	0.00	0.00	0.00	351.41
CSD-138	0.00	351.41	0.00	0.00	0.00	351.41
CSD-139	0.00	351.41	0.00	0.00	0.00	351.41
CSD-140	0.00	351.41	0.78	0.00	0.00	352.19
CSD-141	0.00	371.95	0.00	0.00	0.00	371.95
CSD-142	0.00	378.04	0.00	0.00	0.00	378.04
CSD-143	0.00	355.87	0.00	0.00	25.00	380.87
CSD-144	0.00	387.40	0.00	0.00	0.00	387.40
CSD-145	0.00	392.49	0.00	0.00	0.00	392.49
CSD-146	0.00	400.49	0.00	0.00	0.00	400.49
CSD-147	0.00	401.41	0.00	0.00	0.00	401.41
CSD-148	0.00	451.03	0.00	0.00	0.00	451.03
CSD-149	0.00	467.96	0.00	0.00	0.00	467.96
CSD-150	0.00	491.41	0.00	0.00	0.00	491.41
CSD-151	0.00	501.40	0.00	0.00	0.00	501.40
CSD-152	0.00	645.63	0.00	0.00	0.00	645.63
CSD-153	0.00	702.82	0.00	0.00	0.00	702.82
CSD-154	0.00	741.48	0.00	0.00	0.00	741.48
CSD-155	0.00	741.48	0.00	0.00	0.00	741.48
CSD-156	0.00	526.99	236.79	0.00	0.00	763.78
CSD-157	0.00	526.99	236.79	0.00	0.00	763.78
CSD-158	0.00	782.45	54.59	0.00	0.00	837.04
CSD-159	0.00	780.94	61.53	0.00	0.00	842.47
CSD-160	0.00	781.87	330.87	0.00	0.00	1,112.74
CSD-161	0.00	782.09	351.41	0.00	0.00	1,133.50
CSD-162	0.00	782.09	351.41	0.00	0.00	1,133.50
CSD-163	0.00	581.76	534.40	244.61	0.00	1,360.77
CSD-164	0.00	0.00	0.00	0.00	1,364.32	1,364.32
CSD-165	0.00	0.00	1,476.97	0.00	0.00	1,476.97
CSD-166	0.00	785.54	696.23	0.00	0.00	1,481.77
CSD-167	0.00	787.95	761.33	0.00	0.00	1,549.28
CSD-168	0.00	837.11	785.67	34.06	0.00	1,656.84
CSD-169	0.00	585.12	537.81	506.24	353.91	1,983.08

	<u>Current</u>	<u>1 - 60</u>	<u>61 - 120</u>	<u>121 - 180</u>	<u>> 180</u>	<u>TOTAL</u>
CSD-170	0.00	352.73	305.62	288.78	1,151.48	2,098.61
CSD-171	0.00	1,855.98	679.36	0.00	0.00	2,535.34
CSD-172	0.00	601.57	553.11	518.21	2,087.66	3,760.55
CSD-173	0.00	866.37	816.54	764.20	2,902.12	5,349.23
CSD-174	0.00	13,880.69	0.00	0.00	0.00	13,880.69
TOTAL	-1,035.71	18,828.13	6,340.81	-144.33	6,020.56	30,009.46

PAUMA VALLEY COMMUNITY SERVICES DISTRICT

SECURITY REPORT

September 11 2024 – October 10 2024

Pauma Valley CSD Security Department Personnel		
Name	Call Sign	Billet
Officer Todd Albert	1L2	Patrolman / Security Supervisor
Officer German Colin	1L5	Patrolman
Officer Dale Easter	1L6	Patrolman
Officer Luis Orozco	1L4	Patrolman
Eduardo Aguilar	1L7	Patrolman
Matthew Carson	C1	Gate Attendant Supervisor
Zachary Meyer	C1	Gate Attendant
Brandon Wilson	C1	Gate Attendant
Lucas McElvain	C1	Gate Attendant
Bradley Megginson	C1	Gate Attendant

Vehicle Maintenance Report

- Tesla 01 (74,607) - Did not pass visual inspection.
- Tesla 02 (80,630) - Did not pass visual inspection.

Tesla 01 has scuffs on the bottom right corner of the front bumper. The driver’s seat cover is ripped, wrap has sun damage. The tire pressure monitoring system fault and the driver window switch were replaced. The left rear tire was repaired, and two tires were replaced at Serratos Auto Shop. The cabin air filter needs to be replaced.

Tesla 02 has the driver seat cover ripped; the seat trim is broken. There is sun damage on the wrap. There is a dent on the front passenger side skirt. The rear tires were replaced at Serratos Tire Shop.

German Colin, Vehicle Maintenance Officer

Gate Security Report

Cor Security has repaired the back gate entry, but the front guardhouse switch panel for the rear and center gates requires additional electrical work. The front exit License Plate Reader (LPR) is out of focus, while the back exit LPR and pass scanner are offline but under repair. Improvements have been noted in the Dwelling Live system, though some error messages persist. Regulations regarding service workers' hours have not yet posed an issue, but this may change with the upcoming holiday season. One of our Gate Attendants has left his position, and his shifts will be filled by other security personnel.

Matthew Carson, Gate Supervisor

ACTIVITY LOG

September 11th, 2024 at 0904 – Welfare Check. Officer Easter was dispatched to El Tae for a welfare check. The Officer made contact with the resident.

September 11th, 2024 at 1406 – Public Assist. Officer Easter assisted a resident with moving a vehicle hood onto a trailer.

September 11th, 2024 at 1601 – Residential 11.53. Officer Easter found the back sliding door locked but not latched, the officer secured the door. Also found the garage side door unsecured. The Officer was unable to secure the door. Contact to be notified.

September 11th, 2024 at 2256 – Pauma Village 11.53. Officer Orozco found the Boot Barn gate unsecured. The Officer was unable to secure the gate. Contact to be notified in the morning.

September 12th, 2024 at 1715 – Welfare Check. Officer Easter made contact with the resident for a routine welfare check.

September 13th, 2024 at 0519 – Residential Fire Alarm. Officer Colin reported hearing an alarm sounding from a residential house on Wiskon Way East. Control one contacted the resident, who was unaware of any alarm activation. Officer Colin patrolled around the property and located a smoke detector in the backyard shed that was going off. The officer turned off the detector and informed the resident of the situation.

September 13th, 2024 at 0952 – Welfare Check. Officer Easter made contact with the resident for a routine welfare check.

September 13th, 2024 at 1243 – Process Server. Officer Easter escorted a process server to Tukwut Ct. The server made contact with the resident. The Officer escorted the server out of the community.

September 13th, 2024 at 1447 – Resident Concern. At approximately 1447, a resident, appearing to be in his 70s approached Officer Easter to report that his older sister had taken his phone and car and had not returned to his house. The resident requested to speak with sheriff's deputies and contacted 911 for assistance. Two sheriff's deputies arrived on the scene and spoke with the resident. After assessing the situation, the deputies determined that no crime had been committed, as the resident had given his sister permission to use the car in good faith. The deputies informed the resident that they were unable to assist further due to the lack of criminal offense.

September 13th, 2024 at 2312 – Serratos 459A. Control one contacted Officer Colin, reporting a car alarm sounding at Serratos Auto Shop. The officer arrived on the scene, but the alarm had already stopped. A thorough check of the vehicles was conducted, and there were no signs of a break-in or suspicious activity.

September 14th, 2024 at 0951 – Residential 11.53. Officer Easter found the garage side door unsecured. The Officer cleared and secured the door. Contact to be notified.

September 15th, 2024 at 0553 - Highway 76 fire. Officer Colin was dispatched to a location on Highway 76 near North Coast Church after a fire was reported over the scanner. The officer was the first to arrive on the scene but did not find anyone on the property. After speaking with neighbors, it was confirmed that the owner is currently in Mexico. The fire department arrived shortly after. No further action was required.

September 15th, 2024 at 0654 – Welfare Check. Officer Colin was dispatched to Wiskon Way West for a welfare check on a resident. The Officer made contact with the resident.

September 15th, 2024 at 1209 – Resident Request – Officer Orozco was requested by a resident on Womsi Rd for two suspicious women looking through their house window. The resident witnessed this on their cameras. Officer Orozco arrived on the scene and found no signs of forced entry of the two individuals.

September 15th, 2024 at 2036 – North Coast Church 11.53. Officer Aguilar found the bathroom door unsecured. The Officer cleared and secured the building. Contact to be notified.

September 16th, 2024 at 0225 – Pauma Village 11.53. Officer Albert observed a large wet spot under a U-Haul truck, which appeared to be gasoline, indicating a possible fuel theft. However, the gas cap was still in place. The incident was reported to Control One for further documentation.

September 16th, 2024 at 0235 – North Coast Church 11.53. Officer Albert found the portable restroom with the sliding door unsecured. The officer cleared the building but was unable to secure the door. Contact to be notified in the morning.

September 16th, 2024 at 0645 – Amazon Packages. Officer Albert found two Amazon packages left at the back gate by Amazon. The packages were delivered by the Officer.

September 16th, 2024 at 0916 – Resident Concern. Officer Orozco was dispatched to PVD in response to reports of a suspicious person walking on the bridge on PVD. Upon arrival, the officer made contact with the resident on Wiskon Way West. The resident expressed that he was not feeling well and was upset that his sister had taken his car. He mentioned that he had been trying to contact friends for a ride. During the conversation, the resident made comments indicating potential self-harm. As a precaution, Cal Fire was requested to conduct a welfare check on the resident.

September 16th, 2024 at 0957 – Welfare Check. Officer Orozco was dispatched to Wiskon Way West for a welfare check. The officer made contact with the resident.

September 18th, 2024 at 1019 – Loose Pet. Officer Easter found a loose dog on Luiseno Circle Dr. The Officer contacted the owner. The dog was retrieved by the owner.

September 18th, 2024 at 1118 – Resident Concern. A resident walked to the front gate to express his frustration to the gate attendant regarding his older sister taking his phone and car from his house. The resident requested to speak with the sheriff. Officer Easter advised the resident to call on his spare phone he was holding to speak with the sheriff. The resident made contact with the sheriff and will wait for them at his house.

September 18th, 2024 at 1455 – Medical. Officer Easter was dispatched to Wiskon Way West for a medical call with unknown details. The Officer arrived and found the Country Club GM on the scene with the resident/patient. The GM informed Officer Easter that he had witnessed the resident fall and hit his head. However, the resident denied falling. Cal Fire and medics arrived on the scene. The resident denied medical care and transportation but expressed his concerns about being stuck at his house without transportation. Sheriff deputies shortly afterward, and during the interaction, the resident stated that he felt like hurting himself. Based on this statement, the resident was transported under a 51/50 hold for further evaluation.

September 18th, 2024 at 1640 – Loose Pet. A resident found a dog on PVD. Officer Easter escorted the resident to the house on Luiseno Circle Dr to return the dog.

September 18th, 2024 at 2030 – Unsecured Door. Officer Orozco found one garage door open inside Oak Tree Community. Control One was unable to make contact with the resident.

September 18th, 2024 at 2055 – Unsecured Door. Officer Orozco found two unsecured doors open inside PVCCE. Contact to be notified.

September 19th, 2024 at 0936 – Dog Attack. Officer Albert was dispatched in response to a report of a dog attacking another dog while on a walk. The dog was allegedly chasing an older woman and her Labradoodle down the street. Animal Control was contacted for further assistance. Upon making contact with the woman, she clarified that the dog was not attacking her but would not leave her alone. No injuries were sustained by her or her dog. The dog was later identified as belonging to a resident on Luiseno Circle Dr. The owner retrieved the dog and was advised to keep it on a leash at all times when outside.

September 19th, 2024 at 2030 – Unsecured Door. Officer Easter found three unsecured doors open inside Oak Tree. Unable to make contact.

September 19th, 2024 at 2100 – Unsecured Door. Officer Easter found one unsecured door open inside PVCCE. Contact notified.

September 19th, 2024 at 2124 – Pauma School 11.53. Officer Easter and Officer Meyer found the primary 1 door unsecured, the officers cleared the building but were unable to secure the door. Contact to be notified in the morning.

September 20th, 2024 at 0100 – North Coast Church 11.53. Both Officer Colin and Officer Meyer found the boy's restroom door unsecured. The officers cleared and secured the door. Contact to be notified in the morning.

September 20th, 2024 at 0120 – Pauma Building 11.53. Officer Colin and Officer Meyer found a white Mercedes Benz parked near Serratos Auto Shop with lights on. The vehicle was unoccupied with a flat tire. The vehicle information was documented and reported to Control One.

September 20th, 2024 at 1040 – Tail Gate. Officer Easter was dispatched to the PVCC for a tailgater. The Officer found the owners of a red Tesla Model 3. A verbal warning was issued. The Officer informed the guest must check in at the front gate for a proper pass or a ticket will be issued.

September 20th, 2024 at 1220 – Residential 11.53. Officer Easter found the garage side door unsecured. The Officer cleared and secured the door. Contact to be notified.

September 20th, 2024 at 1810 – Loose Pet. A loose dog was found on Luiseno Circle Dr. The resident was contacted to retrieve the dog.

September 20th, 2024 at 1830 – Gravel Yard 11.53. Found the reservoir gate open, cleared, and secured the gate.

September 20th, 2024 at 2111 – Unsecured Door. Officer Colin found two unsecured doors open inside PVCCE. Contact to be notified.

September 21st, 2024 at 0521 – Resident Concern. A report was received about smoke coming from a neighbor's chimney. Officer Colin arrived on the scene and attempted to make contact with the resident. Shortly after, Cal Fire arrived on the scene. The homeowner eventually came out and stated he was using his fireplace. No further issues were reported.

September 22nd, 2024 at 0157 – PVCSD 459A. Officer Colin was dispatched to PVCSD for a 459A. The restroom and storage room were alerted. No signs of forced entry. The alarm was accidental.

September 22nd, 2024 at 0641 – Resident Concern. Officer Colin was approached by a resident who expressed his desire to speak with the sheriff about his rights. Officer Colin instructed the resident to return to his house, where the sheriff would meet him. Upon arrival, the sheriff informed the resident that they were unable to assist with his concerns but requested a specialist to speak with him, as the resident may be suffering from dementia.

September 22nd, 2024 at 1130 – Medical. Officer Orozco was dispatched to Wiskon Way East for a medical. However, the address was not provided over the scanner. The officer identified the medical issue at the residence, and Cal Fire and medics arrived on the scene. And one was transported for further medical care.

September 22nd, 2024 at 2303 – Jump Start. Officer Aguilar was dispatched to Luiseno Circle Dr for a jump start. The Officer successfully jump-started the vehicle.

September 23rd, 2024 at 1525 – Jump Start. Officer Orozco was requested to Luiseno Circle Dr for a jump start. The Officer was unable to jump-start the resident's battery due to possible battery being dead.

September 23rd, 2024 at 1714 – Other. Officer Orozco was dispatched to the Greens Maintenance location following a report from the General Manager of the PVCC. The GM informed that a resident's vehicle was

parked on the greens, causing damage to the course. The officer requested the removal of the vehicles and spoke with the resident about refraining from parking on private property. The resident was advised that further actions would be taken by the sheriffs if the issue continued.

September 23rd, 2024 at 1937 – North Coast Church 11.53. Officer Aguilar found the double doors to the church unsecured. The Officer cleared the building but was unable to secure the door. Contact to be notified.

September 24th, 2024 at 1817 – Suspicious Activity. A resident at Oak Tree Community reported that another resident, driving a white Toyota Tundra, was seen banging on neighbors' doors, screaming, and using profane language. The reporting resident requested that this individual be contacted by authorities if seen engaging in similar behavior again. Further – follow-up may be necessary to ensure the safety and well-being of the community.

September 24th, 2024 at 2028 – North Coast Church 11.53. Officer Aguilar found the double doors to the church unsecured. The Officer cleared the building but was unable to secure the door. Contact to be notified.

September 24th, 2024 at 2227 – Traffic Collision. A vehicle was reported crashing on Highway 76 near the guard shack. The vehicle collided with a white fence and came to a rest in a nearby ditch. Officer Aguilar made contact with the driver, a female in her 50's. There were no injuries reported. A tow truck was contacted, and a CHP officer arrived on the scene. The vehicle was removed safely from the ditch.

September 25th, 2024 at 1750 – Medical. Officer Easter and Officer Orozco were dispatched to Happy Hollow for a medical. Both Officers arrived on the scene and made contact with a woman who was feeling ill. Cal Fire and Medical arrived. One was transported to UCSD La Jolla Hospital.

September 25th, 2024 at 2350 – Pauma Building 11.53. Officer Orozco set off the alarm at the Native American building. The door was unsecured. The officer cleared and secured the building. The alarm turned off and was accidental. Contact to be notified.

September 26th, 2024 at 0928 – Resident Concern. The resident reported seeing smoke coming from a neighbor's chimney on Luiseno Circle Dr. A Ford Cal fire truck and the sheriff arrived inside PVCCE. Officer Albert arrived on the scene. No signs of fire, nothing to report.

September 26th, 2024 at 1016 – PVCC Report. The Greens maintenance Manager reported a resident eating at the snack bar on private country club property, which is for members only. Officer Albert was requested to respond to the scene. Officer Albert made contact with the resident and informed her that she was not a member of the country club and that the area was restricted to members only. The resident was advised to leave the property immediately and was warned that failure to comply could result in a call to the sheriff for trespassing, which could lead to her arrest. The resident complied and left the property without further incident.

September 27th, 2024 at 2105 – Unsecured Door. Officer Colin found two unsecured doors open inside PVCCE. Contact to be notified.

September 28th, 2024 at 1245 – Resident Request. Officer Aguilar was approached by a man in Oak Tree Community driving a white Toyota Tacoma. The man requested that the patrol no longer park near the sprinklers by the exit gate, citing potential damage to the sprinkler system. Additionally, the man informed the officer that the VP of the board is no longer on the board, so there is no longer a need for a Code 5 patrol near her house.

September 28th, 2024 at 1959 – Resident Concern. A helicopter was reported searching for a suspect in the area. A resident on Womsi Rd reported seeing a man who matched the description. Officer Colin made contact with the individual and confirmed that the person was a guest of a resident. This information was relayed back to Control One.

September 28th, 2024 at 2055 – Suspicious Activity. Control One notified Officer Colin that a sheriff had arrived through the front gate. Officer Colin made contact with the sheriff on Womsi Rd regarding a suspicious individual that had been reported. Officer Colin informed the sheriff that he had already made contact with the individual, confirming that the person was a guest of a resident and not the suspect in question.

September 28th, 2024 at 2214 - Serratos 459A. Control one contacted Officer Colin, reporting a car alarm sounding at Serratos Auto Shop. The officer arrived on the scene, but the alarm had already stopped. A thorough check of the vehicles was conducted, and there were no signs of a break-in or suspicious activity.

September 29th, 2024 at 1821 – Suspicious Activity. A call was reported that a man near Pauma Village who appeared to be looking into vehicles on the property. Officer Aguilar responded and made contact with the individual. The man stated he was waiting to be picked up for a ride. The officer informed him that there were security cameras on the property and advised him not to look into other people's vehicles, warning that the sheriffs would be contacted if necessary. The man was later picked up without further incident.

September 30th, 2024 at 1738 – Process Server. Officer Orozco escorted a process server to Womsi Rd. The server made contact with the resident. The officer escorted the server out of the community.

October 1st, 2024 at 0657 – Loose Pet. Officer Aguilar found two dogs on Wiskon West. The resident was contacted to retrieve the dog.

October 1st, 2024 at 1143 – Fire Alarm. Officer Orozco was dispatched to El Tae Rd for a fire alarm activation. The officer made contact with the resident, who informed him that the alarm was accidental and requested to disregard the response. The officer witnessed Cal Fire entering the community and communicated with them about the accidental alarm. After assessing the area, the officer noted nothing further to report.

October 1st, 2024 at 1725 – North Coast Church 11.53. Officer Orozco found the office door unsecured, and the officer cleared and secured the building. Contact to be notified.

October 2nd, 2024 at 1745 – Welfare Check. Officer Easter was requested to do a welfare check by a landscaper on Luiseno Circle Dr. The landscaper informed the officer that the resident's back two sliding doors had been slightly open for the past couple of weeks and had not seen the resident. The Officer attempted to make contact with the resident. Control One was notified to call the contact. Both were unsuccessful.

October 3rd, 2024 at 1000 – Resident Concern. Officer Easter made contact with a resident who lives on Luiseno Circle Dr. She reported that her dog was turned into the dog pound. She informed the Officer that she would be back later.

October 3rd, 2024 at 1821 – Gate Malfunction. The back entrance gate on PVD/Cole Grade malfunctioned. The gate was shut down. Road signs were put on the street informing residents not to use the back entrance gate.

October 4th, 2024 at 0338 – Noise Complaint. Officer Colin responded to a noise complaint on Luiseno Circle Dr regarding a neighbor who was yelling and whistling. Patrol was requested to speak with the individual making the noise. Upon arrival, the officer made contact with the resident, who came outside and began yelling and cursing at the officer, claiming that her dog was dying. The resident continued to yell and use profane words towards the officer demanding the officer to leave her property. Officer Colin informed the resident to keep the noise down.

October 4th, 2024 at 1138 – Protective Services. A Protective Service Agent conducted a welfare check on a resident at Luiseno Circle Dr. The agent was unable to make contact with the resident. No further action was taken at this time.

October 5th, 2024 at 1406 – Gate Crasher. A resident was struck in the head by an arm barrier while walking behind a vehicle that was entering the member's lane. As the vehicle passed, the barrier came down and made contact with the resident's head. The resident stated that they were fine and declined any medical attention.

October 5th, 2024 at 1841 – Suspicious Activity. Officer Aguilar was dispatched to Womsi Rd in response to a resident reporting suspicious activity near the bushes in front of their hose. The Officer made contact with the resident, who requested that the area be checked. After a thorough search, no individuals were found near the house or in the bushes.

October 5th, 2024 at 1908 – Suspicious Activity. A resident on Luiseno Circle Dr reported seeing a woman outside yelling and requested patrol to check the situation. Officer Aguilar responded and made contact with the woman, who explained that she had lost her dog and was calling for him. The woman was eventually able to retrieve her dog and return to her house.

October 6th, 2024 at 2206 – Resident Concern. Officer Colin was dispatched to Wiskon Way East after a resident reported hearing a beeping noise coming from a neighbor's house. The Officer informed the reporting resident that the house is under construction and a smoke alarm in the backyard tends to go off. Control One attempted to contact the homeowner to inform them that the officer would be entering the backyard to turn off the alarm but was unable to make contact. The alarm was turned off, and there were no further issues to report.

October 8th, 2024 at 0317 – Suspicious Activity. Officer Albert was dispatched to Luiseno Circle Dr after a resident reported smelling smoke on her property and requested a search. The Officer arrived on the property and found no signs of smoke in the area. The resident then requested patrols to drive by the property a couple of times a night.

October 8th, 2024 at 0925 – Resident Concern. A resident who lives on Luiseno Circle Dr reported that her dog was missing and may have been turned into the pound. Nothing to report.

October 8th, 2024 at 0945 – Pauma Village. The Owner of Pauma Village requested that an RV parked on the property lot be removed. Control One made contact with the owner of the RV and will have the vehicle removed.

October 8th, 2024 at 1522 – Fire Alarm Pauma Building. Officer Easter was dispatched to the Pauma Building in response to a fire alarm. The Officer made contact with the owner of building 300, who reported that the alarm was triggered accidentally due to burning sage. Cal Fire also arrived on the scene, conducted an assessment, and reported no further issues or hazards.

October 8th, 2024 at 1708 – Medical. Officer Easter responded to a medical call on Luiseno Circle Dr. The resident reported experiencing abdominal pain. Cal Fire and Tribal Medical arrived on the scene. The resident was transported to Palomar Hospital for further evaluation.

October 8th, 2024 at 1806 – Residential 459A. A resident on Luiseno Circle Dr reported that their next-door neighbor's security alarm was going off and requested patrol assistance. Officer Aguilar arrived on the scene, conducted a full search of the property, and found no signs of forced entry. Officer Aguilar made contact with the reporting resident, who requested additional patrols around the neighborhood.

October 9th, 2024 at – 0900 – Gate Malfunction. Control One reported the front exit gate malfunctioned. The malfunction was reported immediately. The maintenance company has been notified and will be out to inspect and repair the gate as soon as possible.

October 10th, 2024 at 1400 – Gate Repair. Both the front exit gate and rear entrance gate have been repaired.

PVCSD SECURITY REPORT August 11, 2024 – September 10, 2024

RFID Entries						
Front Gate		Center Gate			Back Gate	
10,714		2,078			7,170	
Dispatch By Location						
Inside PVCCE	Oak Tree	School	Business Dist.	St. Francis	PVCC	Hwy 76
30	3		6		2	2
Highlights by Shift Periods						
A: 2200-0600		B: 0600-1400			C: 1400-2200	
17		27			36	

PVCSD Patrol – Building Checks				
Location	Unsecured Door	Fire Alarm	Burglary Alarm	Officer Check
			459A	1153
Country Club(CC)				
Greens Maintenance(GM)				
Community Church(CO)	5			44
Gravel Yard(GY)	1			59
Saint Francis(SF)				66
Pauma School(PS)	1			31
Pauma Building(PB)	1	1		31
Airport Hangars(AH)	1			49
Treatment Plant(TP)				53
Pauma Village(PV)				25
Residential Houses/Other	12	3	4	14

PVCSD SECURITY REPORT August 11, 2024 – September 10, 2024

Patrol Activity				Gate Activity	
				Activity/Malfunctions	Totals
Medicals	5	Resident Concern	12		
Welfare Checks	7	Suspicious Activity	8	Unresponsive	0
Lift Assist		Noise Complaint	1	Will Not Close	2
Domestic Dispute		Process Server	2	False Read	0
Traffic Collisions	1	911 Hang-up Call		Loss of Controls	Continuous
Gate Runner/ Gate Crashers	2	Loose Pets	5	Video Loss	1 Continuous
Public Assists	1	Snake Call		Device Entries	19,962
Jump Start	2	Trespassing	1	Passes Issued	2,233
Notice of Violation		Other	7	Pass Entries	4,734

Acronym Legend			
Acronym	Definition	Acronym	Description
459	Burglary penal code	AFA	Asian Female Adult
AMA	Against Medical Advise	AMA	Asian Male Adult
BOLO	Be on the Lookout	AFJ	Asian Female Juvenile
CHP	California Highway Patrol	AMJ	Asian Male Juvenile
DOB	Date of Birth	BFA	Black Female Adult
DL	Driver License	BMA	Black Male Adult
DV	Domestic Violence	BFJ	Black Female Juvenile
EB	East Bound	BMJ	Black Male Juvenile
FU	Follow Up	HFA	Hispanic Female Adult
IVO	In Vicinity Of	HMA	Hispanic Male Adult
LP	License Plate	HFJ	Hispanic Female Juvenile
LCD	Luiseno Circle Drive	HMJ	Hispanic Male Juvenile
NB	North Bound	MFA	Mexican Female Adult
NLT	No Later Than	MMA	Mexican Male Adult
PERT	Psychiatric Emergency Response Team	MFJ	Mexican Female Juvenile
PT	Patient	MMJ	Mexican Male Juvenile
PVD	Pauma Valley Drive	NAFA	Native American Female Adult
PVRA	Pauma Valley Roadway Association	NAMA	Native American Male Adult
ROTR	Rules of the Road	NAFJ	Native American Female Juvenile
RP	Reporting Party	NAMJ	Native American Male Juvenile
SB	South Bound	WFA	White Female Adult
S/O	Sheriff's Office	WMA	White Male Adult
SR 76	State Route 76/ Highway 76	WFJ	White Female Juvenile
TC	Traffic Collision	WMJ	White Male Juvenile
UTL	Unable to Locate		
WB	West Bound		
WWE	Wiskon Way East		
WWW	Wiskon Way West		
YOA	Years of Age		
Unresponsive	the gate does not open for an RFID		
Will Not Close	the gate does not close when it is supposed to		
False Signal	the alarm goes off in the Front Gate for no discernable reason		
Loss of Controls	gate attendant cannot open the gates remotely		
Video Loss	occurs when the gate attendant cannot see the feeds from the Center or Back Gates		

PAUMA VALLEY COMMUNITY SERVICES DISTRICT

SECURITY REPORT

October 11 2024 – November 10 2024

Pauma Valley CSD Security Department Personnel		
Name	Call Sign	Billet
Officer Todd Albert	1L2	Patrolman / Security Supervisor
Officer German Colin	1L5	Patrolman
Officer Dale Easter	1L6	Patrolman
Officer Luis Orozco	1L4	Patrolman
Eduardo Aguilar	1L7	Patrolman
Matthew Carson	C1	Gate Attendant Supervisor
Zachary Meyer	C1	Gate Attendant
Brandon Wilson	C1	Gate Attendant
Lucas McElvain	C1	Gate Attendant
Bradley Megginson	C1	Gate Attendant

Vehicle Maintenance Report

- Tesla 01 (77,078) - Did not pass visual inspection.
- Tesla 02 (83,400) - Did not pass visual inspection.

Tesla 01 has scuffs on the bottom right corner of the front bumper. The driver seat cover is ripped, wrap has sun damage. The cabin air filter needs to be replaced.

Tesla 02 has the driver seat cover ripped, the seat trim is broken. The cabin air filter needs to be replaced. There is sun damage on the wrap. There is a dent on the front passenger side skirt. The rear tires need replacing.

German Colin, Vehicle Maintenance Officer

Gate Security Report

The switch panel for the rear and center gates remains malfunctioning, requiring further electrical work. Additionally, several License Plate Readers (LPRs) at both gates are either out of focus or offline, and the back gate pass scanner is still being worked on. New Gate Attendant employee has completed training and is now working the overnight shift, while our 1/2 and 1/2 is assigned to weekly patrols.

Matthew Carson, Gate Supervisor

ACTIVITY LOG

October 11th, 2024 at 0850 – Gate Crasher. A white Chevy working truck came in contact with the rear gate arm barrier. The arm barrier was put back into working position. Officer Easter made contact with the service vehicle and issued a warning to report to the front entrance for a vehicle pass.

October 12th, 2024 at 0911 – Medical. Officer Easter responded to a medical call. No medical call was dispatched over the scanner. The officer followed medics to the location at Luiseno Circle Dr. Upon arrival, it was determined that a resident had fallen inside her locked room. Cal Fire personnel forced entry by breaking down the door. The resident was transported for medical assistance.

October 13th, 2024 at 0920 – Medical. Officer Aguilar responded to a medical call. No medical call was dispatched over the scanner. Cal Fire and Mercy Medics arrived on Takishla Ct. A resident was feeling ill. One was transported to Palomar Hospital.

October 14th, 2024 at 0942 – Saint Francis. Officer Aguilar found tire marks in the parking lot of Saint Francis. The officer took pictures and informed the Control 1.

October 15th, 2024 at 0947 – Public Assist. Officer Easter was requested by a resident to remove a rodent from the sink. The rodent was removed.

October 15th, 2024 at 1700 – Medical. Officer Easter was dispatched for a medical on Wiskon Way East. The initial address provided over the scanner was incorrect. Cal Fire and Patrol responded and arrived at the correct address on Wiskon Way West. A resident was feeling weak. One was transported to Palomar Hospital.

October 16th, 2024 at 0131 – 459A. During code 5 at Pauma Village, Officer Aguilar heard an alarm from North Coast Church. The officer arrived on the scene. The officer found no signs of forced entry and was unable to disarm the alarm. Contact to be notified.

October 16th, 2024 at 1558 – Animal Control. Animal Control entered the property through the community gate. Officer Easter arrived at the scene where Animal Control was attempting to contact the resident on Luiseno Circle Dr. Animal Control was unable to make contact with the resident. No further action was required.

October 17th, 2024 at 0925 – Other. Officer Albert followed up with a resident regarding a dog attack. The resident appreciated the call and everything was fine.

October 17th, 2024 at 1404 – Escort Insurance. Officer Easter escorted an insurance agent to take photos of a house for fire insurance. The Officer successfully escorted the agent out of the community.

October 17th, 2024 at 1442 – Other Deputy Sheriffs arrived at the PVCC HOA meeting.

October 18th, 2024 at 1414 – Gate Crasher. A maroon Dodger work truck came in contact with the barrier arm of the rear gate. The barrier arm was put back into working position. The Vehicle was UTL.

October 18th, 2024 at 1900 – Pauma Building 11.53. Officer Easter found a Silver VW Jetta parked in the upper lot unoccupied. The vehicle was notified to Control 1.

October 18th, 2024 at 2241 – Pauma School 11.53. Officer Colin found both the cafeteria door and the primary #3 building unsecured. The officer cleared the cafeteria door but was unable to secure the door. Primary #3 was cleared and secured. Contact to be notified.

October 19th, 2024 at 0105 – Pauma Building 11.53. Officer Colin found building 200 unsecured. The officer cleared and secured the building. Contact to be notified.

October 19th, 2024 at 1320 – Pauma Building. Officer Easter was dispatched by Control 1 to verify a locked door at the Pauma Building. Building #200 was secured.

October 19th, 2024 at 1352 – Animal Control. Animal Control entered the property through the community gate. Officer Easter arrived at the scene where Animal Control was attempting to contact the resident on Temet Dr. Animal Control was unable to make contact with the resident. No further action was required.

October 19th, 2024 at 1806 – Animal Control. Animal Control entered the property through the community gate. Officer Aguilar arrived on the scene where Animal Control was attempting to contact the resident on Luiseno Circle Dr. Animal Control was unable to make contact with the resident. No further action was required.

October 19th, 2024 at 2023 – Suspicious Activity. Officer Aguilar responded to a call regarding a dark blue Chevy Tahoe, possibly crashed off Highway 76. Upon arrival, Officer Aguilar made contact with the vehicle owner, who stated he had pulled over to use the restroom and accidentally parked on soft sand, causing the vehicle to become stuck. A tow truck was dispatched to assist. No further action or incident to report.

October 20th, 2024 at 1708 – Resident report. A resident reported finding a bicycle in the bushes and notified Control 1. The resident was contacted, and the bicycle was retrieved. No further action is required.

October 22nd, 2024 at 0603 – Lift Assist. Officer Albert was requested for a lift assist at El Tae Rd. Upon arrival, it was observed that a resident had fallen in the bathroom. The resident had not sustained any injuries and did not lose consciousness. Officer Albert assisted with lifting the resident back onto the bed. Medical assistance was offered but declined by the resident. No further action is required.

October 22nd, 2024 at 1047 – Process Server. Officer Easter escorted a process server to Luiseno Circle Dr. The server made contact with the resident. The officer escorted the server out of the community.

October 22nd, 2024 at 1223 – Resident Concern. A resident on Luiseno Circle Dr reported someone ringing her doorbell and knocking loudly. No one was on the property, resident requested patrol. Officer Easter made contact with the resident. The Officer searched the house property and found no sign of forced entry or person.

October 22nd, 2024 at 1245 – Resident Report. A resident reported that her neighbor was observed going through her trash and yelling at passing vehicles. After being notified, Officer Easter made contact with the neighbor, who denied both going through the trash and disturbing residents as they drove by. No further action taken at this time.

October 22nd, 2024 at 2120 – Medical. Officer Aguilar responded to a medical on Luiseno Circle Dr. The resident reported his wife was in pain and experiencing stomach pain. Officer Aguilar was first on the scene. Cal Fire and Mercy Medics arrived on the scene. One was transported.

October 22nd, 2024 at 2336 – Sheriff Deputies. Sheriff deputies arrived at PVCCE for Luiseno Circle Dr. Patrol was not requested for assistance. The Sheriff's deputies left shortly after.

October 23rd, 2024 at 2045 – Unsecured Door. Officer Easter found two unsecured doors open inside PVCCE. Contact to be notified.

October 24th, 2024 at 1152 – Snake Call. Officer Easter was dispatched to Luiseno Circle Dr for a snake call. The Officer Removed the snake.

October 25th, 2024 at 1235 – Suspicious Activity. Officer Easter was notified that a suspicious man was walking down Highway 76 eastbound along the white fence. Officer Easter was requested to stay alert for any suspicious activity.

October 26th, 2024 at 1215 – Resident Concern. Officer Easter was stopped by a resident in Oak Tree who expressed her concerns with vehicles parked on the street. The Officer informed the resident to contact their HOA via email and inform them of the issue to be documented.

October 28th, 2024 at 0931 – Suspicious Activity. Control one received a call from a landscaper working at a residence on Atosana Dr, who reported the garage door open, and the side door looked to be forced

open. Officer Aguilar arrived on the scene and made contact with the landscaper. The homeowner was contacted and permitted the officer to check the residence. The homeowner stated that the garage door might be malfunctioning and requested increased patrols at night. No further action is required at this time.

October 28th, 2024 at 1741 – Suspicious Activity. Officer Aguilar was notified of a delivery driver at the back gate attempting to enter. The officer made contact with the driver, who stated he was delivering flowers to a residence on Indian Bend Rd. Officer Aguilar directed the driver to the front gate to obtain a pass. The driver indicated he had contacted the homeowner and would meet them at the back gate to deliver the flowers. No further action is required.

October 29th, 2024 at 1240 – Gravel Yard 11.53. Officer Albert found the reservoir gate unsecured. The Officer cleared and secured the gate.

October 29th, 2024 at 0922 – Resident Concern. Officer Aguilar was stopped by a resident in Oak Tree Community. The resident inquired whether street parking is being issued. The Officer informed the resident that he would check with his supervisor.

October 29th, 2024 at 1823 – Loose Dog. Officer Aguilar responded to an injured dog that was struck by a vehicle on Highway 76 near the Knox gate. Animal Control was contacted.

October 30th, 2024 at 1121 – Medical. Officer Orozco was dispatched for a medical call at Temet Dr where a resident was having difficulty breathing. The officer assisted until Cal Fire and Medics arrived on the scene. The resident was evaluated, and one individual was transported for further medical care.

November 1st 2024 at 0400 – North Coast 11.53. Officer Colin found K- 2nd room unsecured. The officer cleared and secured the building. Contact to be notified.

November 2nd, 2024 at 1150 – PVCC Escort. Officer Easter was dispatched to the PVCC golf shop in response to a report of an aggressive and disrespectful golfer. The officer made contact with the individual and successfully escorted him out of the community without further incident.

November 3rd, 2024 at 1540 – Medical. Officer Orozco was dispatched to the country club for a medical emergency where a guest was experiencing symptoms consistent with a possible heart attack. Cal Fire and Medics arrived on the scene, evaluated the guest, and transported the individual to a medical facility in Temecula for further treatment.

November 3rd, 2024 at 2147 – Noise Complaint. A resident reported a dog barking for an extended period and requested a patrol check to locate the source. The officer conducted a patrol of the area but was unable to identify the origin of the barking. No further action is required at this time.

November 4th, 2024 at 1001 – Medical. Officer Orozco was dispatched to El Tae Rd for a medical call. The resident's daughter reported that her mother had suffered a fall during a recent vacation in Hawaii and had been feeling unstable and unwell since. Cal Fire and Medics arrived on the scene, evaluated the patient, and transported her to the hospital for further care.

November 4th, 2024 at 2302 – Public Assist. Officer Aguilar was requested to help turn off a water softener On El Tae. The Officer arrived on the scene and assisted with the shut-off. The water softener was still leaking water, the officer advised a handyman to come and take a look at the installation.

November 5th, 2024 at 1011 – Lift Assist. Officer Orozco was dispatched to PVD for a lift assist. The officer made contact with the husband, who reported that his wife had slipped and fallen. No injuries were sustained; assistance was needed to help her back onto the bed. The officer's call for additional assistance was declined. NO visible injuries were observed. Nothing further to report.

November 5th, 2024 at 2132 – Lift Assist. Officer Aguilar was requested to assist a resident in getting back onto the bed. Medics were dispatched to the scene for evaluation. No transport was required.

November 6th, 2024 at 0715 – Water Leak. A water leak was reported by RPM on Wiskon Way West.

November 8th, 2024 at 1145 – Medical. Officer Easter responded to a medical call in the Oak Tree Community. Upon arrival, the officer made contact with two individuals, both mail carriers. One reported that his partner who is pregnant passed out while placing mail into the mailbox. She was seated in the vehicle with the AC on upon the officer's arrival. Pauma Fire and Medics arrived shortly after, and one individual was transported for further medical care.

November 8th, 2024 at 2320 – Pauma School 11.53. Officer Colin found the girl's restroom unsecured. The officer cleared the building but was unable to secure the door. Contact to be notified in the morning.

November 9th, 2024 at 0311 – Medical. Officer Colin was dispatched to El Tae Rd for a medical. A resident's granddaughter was recovering from surgery and feeling ill. Cal Fire and Medics arrived on the scene. One was transported to Palomar Hospital.

November 9th, 2024 at 0847 – Resident Concern. A resident reported that her neighbor was screaming, yelling, and banging on doors on Luiseno Circle Dr. Officer Easter arrived on the scene and located the resident in question. The resident was observed in an open area, accusing the community of stealing her dog. Officer Easter calmed the resident down, and instructed her to return to her home, and the resident complied and appeared to calm down.

November 9th, 2024 at 1034 – Other. Sheriff deputies arrived at Luiseno Circle Dr in response to a call regarding a resident yelling and screaming. They made contact with the resident, observed her behavior, and determined she was not a threat to others. The deputies informed Officer Easter that they would not respond to future calls of this nature unless a restraining order was obtained.

November 10th, 2024 at 0946 – Trespassing. Control 1 received a call regarding a male trespasser on the property of Cuesta De Camilla. The owner reported that the same individual frequently trespasses on her property. The officer arrived on the scene, and patrolled the area, but was unable to locate the individual. The owner was advised to contact Control 1 if further incidents occur.

November 11th 2024 at 0522 – Resident Concern. A resident on Luiseno Circle Dr reported hearing her neighbor yelling, requesting for patrol. Officer Colin arrived on the scene, and made contact with the resident who was yelling, she said she was calling for her dog but would keep it down. Nothing to report at this time.

November 11th, 2024 at 2047 – Domestic Dispute. Officer Orozco was dispatched to Cuesta De Camilla in response to a domestic call. The Officer arrived on the scene and was met by the girlfriend, who reported that she and her boyfriend had been arguing over personal matters. She requested that the patrol remain on the scene while she gathered her belongings. Both parties declined the need for sheriff or medical assistance. No physical abuse was reported or observed. Nothing further to report.

PVCSD SECURITY REPORT October 11, 2024 – November 10, 2024

RFID Entries						
Front Gate		Center Gate			Back Gate	
10,837		1,910			3,583	
Dispatch By Location						
Inside PVCCE	Oak Tree	School	Business Dist.	St. Francis	PVCC	Hwy 76
31	2		1		2	3
Highlights by Shift Periods						
A: 2200-0600		B: 0600-1400			C: 1400-2200	
8		27			19	

PVCSD Patrol – Building Checks				
Location	Unsecured Door	Fire Alarm	Burglary Alarm	Officer Check
			459A	1153
Country Club(CC)				
Greens Maintenance(GM)				
Community Church(CO)	1		1	41
Gravel Yard(GY)	1			65
Saint Francis(SF)				61
Pauma School(PS)	3			21
Pauma Building(PB)				33
Airport Hangars(AH)				48
Treatment Plant(TP)				55
Pauma Village(PV)	1			29
Residential Houses/Other	2			3

PVCSD SECURITY REPORT October 11, 2024 – November 10, 2024

Patrol Activity				Gate Activity	
Medicals	10	Resident Concern	7	Activity/Malfunctions	Totals
Welfare Checks		Suspicious Activity	4	Unresponsive	1 (continuous)
Lift Assist	3	Noise Complaint	1	Will Not Close	2
Domestic Dispute	1	Process Server	1	False Read	0
Traffic Collisions		911 Hang-up Call		Loss of Controls	Continuous
Gate Runner/ Gate Crashers	2	Loose Pets	1	Video Loss	2, Continuous
Public Assists	2	Snake Call	2	Device Entries	16,330
Jump Start		Trespassing	1	Passes Issued	2,377
Notice of Violation		Other	12	Pass Entries	5,019

Acronym Legend			
Acronym	Definition	Acronym	Description
459	Burglary penal code	AFA	Asian Female Adult
AMA	Against Medical Advise	AMA	Asian Male Adult
BOLO	Be on the Lookout	AFJ	Asian Female Juvenile
CHP	California Highway Patrol	AMJ	Asian Male Juvenile
DOB	Date of Birth	BFA	Black Female Adult
DL	Driver License	BMA	Black Male Adult
DV	Domestic Violence	BFJ	Black Female Juvenile
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WWE	Wiskon Way East		
WWW	Wiskon Way West		
YOA	Years of Age		
Unresponsive	the gate does not open for an RFID		
Will Not Close	the gate does not close when it is supposed to		
False Signal	the alarm goes off in the Front Gate for no discernable reason		
Loss of Controls	gate attendant cannot open the gates remotely		
Video Loss	occurs when the gate attendant cannot see the feeds from the Center or Back Gates		

2025 HEALTH BENEFITS PROGRAM

MEDICAL BENEFITS & ANCILLARY COVERAGES





Special District Risk Management Authority is a public agency formed under California Government Code Section 6500 et seq. to provide a full-service risk management program for California's local governments including property, liability and workers' compensation coverages. In addition, SDRMA is an administrator of the Small Group Health Benefits Program under Public Risk Innovation, Solutions, and Management (PRISM).

The Health Benefits Program consists of Medical Benefits and Ancillary Coverages. Medical Benefits includes plans by Blue Shield, Anthem-Blue Cross and Kaiser. Most Blue Shield and Anthem-Blue Cross plans have prescription drug programs provided by Express Scripts. Ancillary Coverages include Delta Dental, VSP Vision, VOYA FINANCIAL Life, Short Term Disability, Long Term Disability and Concern Employee Assistance Program. Public agencies can select which programs they would like to join subject to underwriting approval.

We realize selecting a health plan for your agency and your employees is just one of the key decisions you are faced with on an on-going basis. This important decision involves not only the cost of various providers and plans, but also access to doctors and hospitals, prescription drug services, and other additional programs and services. The combination of medical plans and providers that is right for your agency depends on a variety of factors, such as your preference for a Health Maintenance Organization (HMO) or Preferred Provider Organization (PPO); your premium and out-of-pocket costs; and the need for access to specific doctors and hospitals.

We understand that comparing health plan benefits, features and costs can be complicated. This brochure provides information that will help simplify your decision making process. Our enrollment process is easy and only requires a few simple steps.

For more information, please contact us at **800.537.7790**. We are ready to serve you!

IMPORTANT TERMS TO KNOW

You may see and hear some unfamiliar terms as you begin to use your health plan. It's important that you understand these terms so you can get the most out of your coverage.

Premium • This is the amount you pay every month to SDRMA to maintain your health insurance coverage.

Co-pay • This is a fixed amount you pay for certain covered services, like doctor's visits.

Calendar Year Deductible • This is the fixed amount some plans require you to pay before the plan begins to pay its share for covered benefits.

Coinsurance • Once you have paid your full deductible, this is the percentage owed by you to pay for accessed services. This can fluctuate based on the cost the provider is charging and/or what has been agreed to between the Medical carrier and the Provider. Coinsurance is unlike Co-pay which is always a flat dollar amount.

Maximum Medical Out of Pocket • This is the maximum you'll pay per year for medical services before your medical plan begins to pay for 100% of services, protecting you and your family from catastrophic medical expenses. Most of your co-payments, deductibles and coinsurance payments will be counted toward this limit.

1. Entity must be a public agency formed under California law.
2. Entity must have a minimum of two full-time active employees to join. An active full-time employee is an employee who is eligible for enrollment in employee sponsored benefits paid for by the Entity. Part-time employees may be considered active employees only if they are currently part of the benefit eligible population and work a minimum of twenty hours weekly.
3. **Active Employees:**
Medical Benefits - Entity must contribute a minimum of 75% of the cost for active employees.
Ancillary Coverages - Entity must contribute a minimum of 75% of the cost for active employees.
4. **Dependents:**
Medical Benefits - If the Entity offers coverage to dependents, it is recommended the Entity contribute a minimum of 50% of the cost for dependents.
Ancillary Coverages - If the Entity offers coverage to dependents, it is recommended the Entity contribute a minimum of 50% of the cost for dependents.
5. **Retirees:**
Medical Benefits - Entity may offer coverage to retirees.
Ancillary Coverages - Entity may offer coverage to retirees. Retirees are only eligible for Dental and Vision.
6. **Public Officials:**
 Entity may offer coverage to public officials (board members, etc.) only if they are currently being covered and Entity's enabling act, plans and policies allow it. Entity is required to cover 75% of the cost for public officials when covering their medical benefits/ancillary coverages. Participation for public officials is limited to their term of office.
7. Entity must have at least 75% of eligible employees (and public officials if they are offered coverage by the Entity) enrolled in order to participate. Public Officials, retirees and dependents may not be covered unless active employees are covered.
8. Premiums are based on a full month. There are no partial months or prorated premiums and participant changes will be effective first of the month following the qualifying event. The waiting period for medical benefits/ancillary coverages is effective 1st of the following the date of hire of an employee.
9. The maximum dependent child age is 26. Disabled dependent children are not subject to the dependent age restrictions; however, a verification form will be required certifying the disability.
10. Each prospective new Entity must complete and submit the SDRMA Interest Forms including a large claimant disclosure form (Medical Benefits only) detailing any knowledge of and information pertaining to large and/or ongoing claims. Each Entity is subject to underwriting review and may or may not be accepted for coverage. The underwriting process may take up to two weeks for completion.
11. Entity's governing body must approve a resolution authorizing participation in SDRMA's health benefits program and execute the Memorandum of Understanding (MOU).
12. Once an Entity is approved by underwriting they must submit the Resolution and MOU to SDRMA 45 days before the requested effective date of coverage.
13. *Medical Benefits* - Not all Plans will be offered and available to Entities joining the medical benefits program. The Access+ HMO 15, HMO 20 and Kaiser Plans are not available in all areas. Please check with SDRMA at the time you are submitting your request for underwriting approval to see if the HMO plans are available in your area. Entities selecting one of the medical benefits program High Deductible Health Plans (HDHP) are responsible for adhering to IRS rules, regulations and maintenance of the Health Savings Account (HSA). SDRMA does not provide HSA services but can provide contact information for a financial institution that currently offers this type of service.
14. **Plan Selections and Combination Guidelines:**
Medical Plan Selection
 Subject to underwriting review and approval:
 - 2-100 enrolled lives: 2 plans + 1 Kaiser plan
 - 101-200 enrolled lives: 3 plans + 1 Kaiser plan*Medical Plan Combinations*
 - Only 1 HMO or HDHP plan may be offered to an employee group
 - Future plan changes are subject to review and approval by underwriting. An entity cannot offer a Silver PPO plan and a Bronze PPO plan at the same time per Underwriting guidelines.
Ancillary Coverages - Entity will choose the particular dental, vision, life, short term disability and/or long term disability option to offer its employees.

Ancillary Plan Selections
 Subject to underwriting review and approval:
 - 2-50 enrolled lives: 1 Dental PPO plan and 1 *Dental HMO plan may be offered to an employee group. 1 Vision plan may be offered to an employee group. 1 Short Term Disability Plan may be offered to an employee group. 1 Long Term Disability Plan may be offered to an employee group.
 - Future plan changes are subject to review and approval by underwriting
 * *Dental HMO is not available in all areas. Please check with SDRMA at the time you are submitting your request for underwriting approval to see if the Dental HMO plan is available in your area*



MEDICAL BENEFITS SUMMARY



PLAN SUMMARY – BLUE SHIELD

*See page 3, note 14 for Plan Selections and Combination Guidelines

DEDUCTIBLES/COINSURANCE	Gold PPO		Platinum PPO	
Calendar Year Deductible(s) (Individual/Family)	\$500 / \$1,000		\$300 / \$600	
Maximum Medical Out of Pocket (Individual/Family)	\$2,000 / \$4,000		\$1,300 / \$3,600	
Medicare Medical Maximum Out of Pocket	\$1,500 / \$3,000		\$1,000 / \$3,000	
Services/Coverages	Participating Providers (You Pay)	Non-Participating Providers (You Pay)	Participating Providers (You Pay)	Non-Participating Providers (You Pay)
Inpatient Hospital Room, Board & Support Services (prior authorization required)	20%	50% up to \$600 per day	10%	50% up to \$600 per day
Outpatient Hospital	20%	50% up to \$350 per day	10%	50% up to \$350 per day
Ambulatory Surgery Center	10%; Deductible Waived	50% up to \$350 per day	No Charge; Deductible Waived	50% up to \$350 per day
Emergency Room	\$100 co-pay + 20% (co-pay waived if admitted)		\$100 co-pay + 10% (co-pay waived if admitted)	
Urgent Care	\$20 co-pay	50%	\$20 co-pay	50%
Physician Benefits (office visits)	\$20 co-pay	50%	\$20 co-pay	50%
Preventative Care	No Charge	Not Covered	No Charge	Not Covered
Lab/X-ray	\$0 (\$25 co-pay + 20% if services provided by Hospital)	50% (up to \$350/ per day within Hospital)	\$0 (\$25 co-pay + 10% if services provided by Hospital)	50% (up to \$350/ per day within Hospital)
Complex Imaging (CT, PET, MRI, etc.)	20% (\$100 co-pay + 20% if services provided by Hospital)	50% up to \$800 per day	10% (\$100 co-pay + 10% if services provided by Hospital)	50% up to \$800 per day
Acupuncture (26 visits per calendar year/combined with Chiropractic)	20%		10%	
Chiropractic Services (26 visits per calendar year/combined with Acupuncture)	20% up to \$50 per visit	50% up to \$25 per visit	10% up to \$50 per visit	50% up to \$25 per visit
Prescription Drugs <i>Active/Early Retiree Plans Only</i>	Express Scripts*		Express Scripts*	
Prescription Maximum Out of Pocket	\$4,600 / \$9,200		\$5,300 / \$9,600	
(At Participating Pharmacies only)	Generic / Brand / Non-Formulary / Specialty		Generic / Brand / Non-Formulary / Specialty	
Retail - 30 day supply	\$5 / \$30 / \$45 / 30% (max co-pay \$150)		\$5 / \$30 / \$45 / 30% (max co-pay \$150)	
Mail Order - 90 day supply	\$10 / \$75 / \$112.50 / 30% (max co-pay \$300)		\$10 / \$75 / \$112.50 / 30% (max co-pay \$300)	
Brand / Non-Formulary / Specialty Deductible (Individual / Family)	None		None	

THIS SUMMARY IS INTENDED TO COMPARE COVERAGE BENEFITS ONLY. THE ACTUAL PLAN CONTRACT SHOULD BE CONSULTED FOR A DETAILED DESCRIPTION OF COVERAGE BENEFITS AND LIMITATIONS. NON-PARTICIPATING PROVIDER MEMBER COST MAY NOT APPLY TO MAXIMUM OUT OF POCKET COSTS.

*See Rx benefits for Medicare on page 15 under the "EGWP" pharmacy co-pay structure.

PLAN SUMMARY – BLUE SHIELD

*See page 3, note 14 for Plan Selections and Combination Guidelines

DEDUCTIBLES/COINSURANCE	Silver PPO		Bronze PPO	
Calendar Year Deductible(s) (Individual/Family)	\$2,000 / \$4,000		\$5,000 / \$10,000	\$5,000 / \$10,000
Maximum Medical Out of Pocket (Individual/Family)	\$5,000 / \$10,000		\$7,000 / \$14,000	No Limit Single/ No Limit Family
Medicare Medical Maximum Out of Pocket	\$3,000 / \$6,000		\$7,000 / \$14,000	No Limit Single/ No Limit Family
Services/Coverages	Participating Providers (You Pay)	Non-Participating Providers (You Pay)	Participating Providers (You Pay)	Non-Participating Providers (You Pay)
Inpatient Hospital Room, Board & Support Services (prior authorization required)	20%	50% up to \$600 per day	30%	50% up to \$600 per day
Outpatient Hospital	20%	50% up to \$350 per day	30%	50% up to \$350 per day
Ambulatory Surgery Center	10%; Deductible Waived	50% up to \$350 per day	20%; Deductible Waived	50% up to \$350 per day
Emergency Room	\$100 co-pay + 20% (co-pay waived if admitted)		\$250 co-pay + 30% (co-pay waived if admitted)	
Urgent Care	\$30 co-pay	50%	30%; Deductible Waived	50%
Physician Benefits (office visits)	\$30 co-pay	50%	30%; Deductible Waived	50%
Preventative Care	No Charge	Not Covered	No Charge	Not Covered
Lab/X-ray	\$0 (\$25 co-pay + 20% if services provided by Hospital)	50% (up to \$350/ per day within Hospital)	30% (\$25 co-pay + 30% if services provided by Hospital)	50% (up to \$350/ per day within Hospital)
Complex Imaging (CT, PET, MRI, etc.)	20% (\$100 co-pay + 20% if services provided by Hospital)	50% up to \$800 per day	30% (\$100 co-pay + 30% if services provided by Hospital)	50% up to \$800 per day
Acupuncture (26 visits per calendar year/combined with Chiropractic)	20%		30%	50%
Chiropractic Services (26 visits per calendar year/combined with Acupuncture)	20% up to \$50 per visit	50% up to \$25 per visit	30% up to \$50 per visit	50% up to \$25 per visit
Prescription Drugs Active/Early Retiree Plans Only	Express Scripts*		Express Scripts*	
Prescription Maximum Out of Pocket	\$1,600 / \$3,200		\$1,500 / \$3,000	
(At Participating Pharmacies only)	Generic / Brand / Non-Formulary / Specialty		Generic / Brand / Non-Formulary / Specialty	
Retail - 30 day supply	\$10 / \$20 / \$45 / 30% (max co-pay \$150)		\$15 / \$50 / \$50 / 30% (max co-pay \$150)	
Mail Order - 90 day supply	\$20 / \$40 / \$90 / 30% (max co-pay \$300)		\$30 / \$100 / \$100 / 30% (max co-pay \$300)	
Brand / Non-Formulary / Specialty Deductible (Individual / Family)	\$200 / \$500		None	

THIS SUMMARY IS INTENDED TO COMPARE COVERAGE BENEFITS ONLY. THE ACTUAL PLAN CONTRACT SHOULD BE CONSULTED FOR A DETAILED DESCRIPTION OF COVERAGE BENEFITS AND LIMITATIONS. NON-PARTICIPATING PROVIDER MEMBER COST MAY NOT APPLY TO MAXIMUM OUT OF POCKET COSTS.

*See Rx benefits for Medicare on page 15 under the "EGWP" pharmacy co-pay structure.

PLAN SUMMARY – BLUE SHIELD

*See page 3, note 14 for Plan Selections and Combination Guidelines

DEDUCTIBLES/COINSURANCE	EPO	HDHP 10 (HSA)		HDHP 20 (HSA)	
Calendar Year Deductible(s) (Individual/Family)	\$300 / \$600	\$1,600 / \$3,200		\$3,000 / \$6,000	
Maximum Medical Out of Pocket (Individual/Family)	\$1,300 / \$2,600	\$5,000 / \$10,000		\$5,950 / \$11,900	
Medicare Medical Maximum Out of Pocket	\$1,000 / \$2,000	Non-Applicable		Non-Applicable	
Services/Coverages	Participating Providers (You Pay)	Participating Providers (You Pay)	Non-Participating Providers (You Pay)	Participating Providers (You Pay)	Non-Participating Providers (You Pay)
Inpatient Hospital Room, Board & Support Services (prior authorization required)	No Charge	10%	50% up to \$600 per day	20%	50% up to \$600 per day
Outpatient Hospital	\$30 co-pay	10%	50% up to \$350 per day	20%	50% up to \$350 per day
Ambulatory Surgery Center	No Charge; Deductible Waived	No Charge	50% up to \$350 per day	10%	50% up to \$350 per day
Emergency Room	\$100 co-pay (co-pay waived if admitted)	\$100 co-pay + 10% (co-pay waived if admitted)		\$100 co-pay + 20% (co-pay waived if admitted)	
Urgent Care	\$30 co-pay	10%	50%	20%	50%
Physician Benefits (office visits)	\$30 co-pay	10%	50%	20%	50%
Preventative Care	No Charge	No Charge	Not Covered	No Charge	Not Covered
Lab/X-ray	\$0 (\$25 co-pay if services provided by Hospital)	\$0 (\$25 co-pay + 10% if services provided by Hospital)	50% (up to \$350/ per day within Hospital)	\$0 (\$25 co-pay + 20% if services provided by Hospital)	50% (up to \$350/ per day within Hospital)
Complex Imaging (CT, PET, MRI, etc.)	\$0 (\$100 co-pay if services provided by Hospital)	10% (\$100 co-pay + 10% if services provided by Hospital)	50% up to \$800 per day	20% (\$100 co-pay + 20% if services provided by Hospital)	50% up to \$800 per day
Acupuncture (26 visits per calendar year/ combined with Chiropractic)	\$30 co-pay	10% up to \$30 per visit		20% up to \$30 per visit	
Chiropractic Services (26 visits per calendar year/combined with Acupuncture)	\$30 co-pay	10% up to \$25 per visit	50% up to \$25 per visit	20% up to \$25 per visit	50% up to \$25 per visit
Prescription Drugs <i>Active/Early Retiree Plans Only</i>	Express Scripts*	Blue Shield		Blue Shield	
Prescription Maximum Out of Pocket	\$5,300 / \$10,600	Combined with Medical		Combined with Medical	
(At Participating Pharmacies only)	Generic / Brand / Non-Formulary / Specialty	Generic / Brand / Specialty	Generic / Brand / Specialty	Generic / Brand / Specialty	Generic / Brand / Specialty
Retail - 30 day supply	\$10 / \$20 / \$45 / 30% (max co-pay \$150)	\$7 / \$25 / 30% up to \$150 / prescription	\$7 / \$25 / 30% up to \$150 / prescription	\$7 / \$25 / 30% up to \$150 / prescription	\$7 / \$25 / 30% up to \$150 / prescription
Mail Order - 90 day supply	\$15 / \$50 / \$112.50 / 30% (max co-pay \$150)	\$14 / \$60 / 30% up to \$300 / prescription	Not Covered	\$14 / \$60 / 30% up to \$300 / prescription	Not Covered
Brand / Non-Formulary / Specialty Deductible (Individual / Family)	\$200	Subject to Deductible		Subject to Deductible	

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*See Rx benefits for Medicare on page 15 under the "EGWP" pharmacy co-pay structure.

PLAN SUMMARY – BLUE SHIELD

*See page 3, note 14 for Plan Selections and Combination Guidelines

DEDUCTIBLES/COINSURANCE		Access+ HMO 15	Access+ HMO 20
Calendar Year Deductible(s) (Individual/Family)		None	None
Maximum Medical Out of Pocket (Individual/Family)		\$1,500 / \$3,000	\$1,500 / \$3,000
Medicare Medical Maximum Out of Pocket		Non-Applicable	Non-Applicable
Services/Coverages		Participating Providers (You Pay)	Participating Providers (You Pay)
Inpatient Hospital Room, Board & Support Services (prior authorization required)		No Charge	\$250 / Admission
Outpatient Hospital		\$100 / Surgery	\$150 / Surgery
Ambulatory Surgery Center		No Charge	\$50 / Surgery
Emergency Room		\$50 co-pay (co-pay waived if admitted)	\$100 co-pay (co-pay waived if admitted)
Urgent Care		\$15 co-pay	\$20 co-pay
Physician Benefits (office visits)	Note: A woman may self-refer to an OB/GYN or family practice physician in her personal physician's medical group or IPA for OB/GYN services.	\$15 co-pay	\$20 co-pay
Preventative Care		No Charge	No Charge
Lab/X-ray		No Charge	No Charge
Complex Imaging (CT, PET, MRI, etc.)		No Charge	No Charge
Acupuncture (30 visits per calendar year/combined with Chiropractic)		\$10 co-pay	\$10 co-pay
Chiropractic Services (30 visits per calendar year/combined with Acupuncture)		\$10 co-pay	\$10 co-pay
Prescription Drugs Active/Early Retiree Plans Only		Express Scripts	Express Scripts
Prescription Maximum Out of Pocket		\$5,100 / \$10,200	\$5,100 / \$10,200
(At Participating Pharmacies only)		Generic / Brand / Non-Formulary / Specialty	Generic / Brand / Non-Formulary / Specialty
Retail - 30 day supply		\$5 / \$10 / \$25 / 20% (max co-pay \$100)	\$10 / \$25 / Not Covered / 20% (max co-pay \$100)
Mail Order - 90 day supply		\$10 / \$20 / \$50 / 20% (max co-pay \$100)	\$20 / \$50 / Not Covered / 20% (max co-pay \$100)
Brand Deductible (Individual / Family)		None	None

THIS SUMMARY IS INTENDED TO COMPARE COVERAGE BENEFITS ONLY. THE ACTUAL PLAN CONTRACT SHOULD BE CONSULTED FOR A DETAILED DESCRIPTION OF COVERAGE BENEFITS AND LIMITATIONS. NON-PARTICIPATING PROVIDER MEMBER COST MAY NOT APPLY TO MAXIMUM OUT OF POCKET COSTS.

PLAN SUMMARY – KAISER

*See page 3, note 14 for Plan Selections and Combination Guidelines

DEDUCTIBLES/COINSURANCE/MAXIMUM	Kaiser HMO 15	Kaiser HMO 20
Calendar Year Deductible(s) (Individual/Family)	None	None
Maximum Medical Out of Pocket (Individual/Family)	\$1,500 / \$3,000	\$1,500 / \$3,000
Medicare Medical Maximum Out of Pocket	Non-Applicable	Non-Applicable
Services/Coverages	Participating Providers (You Pay)	Participating Providers (You Pay)
Inpatient Hospital Room, Board & Support Services (prior authorization required)	No Charge	\$250 / Admission
Outpatient Hospital	\$15 / Surgery	\$20 / Surgery
Ambulatory Surgery Center	\$15 / Surgery	\$20 / Surgery
Emergency Room	\$50 co-pay (co-pay waived if admitted)	\$100 co-pay (co-pay waived if admitted)
Urgent Care	\$15 co-pay	\$20 co-pay
Physician Benefits (office visits)	\$15 co-pay	\$20 co-pay
Preventative Care	No Charge	No Charge
Lab/X-ray	No Charge	No Charge
Complex Imaging (CT, PET, MRI, etc.)	No Charge	No Charge
Acupuncture (30 visits per calendar year/combined with Chiropractic)	\$10 co-pay	\$10 co-pay
Chiropractic Services (30 visits per calendar year/combined with Acupuncture)	\$10 co-pay	\$10 co-pay
Prescription Drugs Active/Early Retiree Plans Only	Kaiser	Kaiser
(At Participating Pharmacies only)	Generic / Brand / Specialty	Generic / Brand / Specialty
Retail - 30 day supply	\$5 / \$20 / \$20	\$10 / \$25 / 20% (max co-pay \$150)
Mail Order - 100 day supply	\$10 / \$40	\$20 / \$50
Brand Deductible (Individual / Family)	None	None

THIS SUMMARY IS INTENDED TO COMPARE COVERAGE BENEFITS ONLY. THE ACTUAL PLAN CONTRACT SHOULD BE CONSULTED FOR A DETAILED DESCRIPTION OF COVERAGE BENEFITS AND LIMITATIONS. NON-PARTICIPATING PROVIDER MEMBER COST MAY NOT APPLY TO MAXIMUM OUT OF POCKET COSTS.

PLAN SUMMARY – KAISER – MEDICARE

DEDUCTIBLES/COINSURANCE/MAXIMUM	Kaiser Permanente Senior Advantage (KPSA) HMO with Part D
Calendar Year Deductible(s) (Individual/Family)	None
Maximum Medical Out of Pocket (Individual/Family)	\$1,000 / \$2,000
Medicare Medical Maximum Out of Pocket	Non-Applicable
Services/Coverages	Participating Providers (You Pay)
Inpatient Hospital Room, Board & Support Services (prior authorization required)	No Charge
Outpatient Hospital	\$10 / Surgery
Ambulatory Surgery Center	\$10 / Surgery
Emergency Room	\$50 co-pay (co-pay waived if admitted)
Urgent Care	\$10 co-pay
Physician Benefits (office visits)	\$10 co-pay
Preventative Care	No Charge
Lab/X-ray	No Charge
Complex Imaging (CT, PET, MRI, etc.)	No Charge
Acupuncture (30 visits per calendar year/combined with Chiropractic)	\$10 co-pay
Chiropractic Services (30 visits per calendar year/combined with Acupuncture)	\$10 co-pay
Prescription Drugs	Kaiser
(At Participating Pharmacies only)	Generic / Brand
30 day supply	\$5 / \$20
31 – 60 day supply	\$10 / \$40
61 - 100 day supply	\$15 / \$60
(Mail Order Refills only)	Generic / Brand
30 day supply	\$5 / \$20
31 – 100 day supply	\$10 / \$40

THIS SUMMARY IS INTENDED TO COMPARE COVERAGE BENEFITS ONLY. THE ACTUAL PLAN CONTRACT SHOULD BE CONSULTED FOR A DETAILED DESCRIPTION OF COVERAGE BENEFITS AND LIMITATIONS. NON-PARTICIPATING PROVIDER MEMBER COST MAY NOT APPLY TO MAXIMUM OUT OF POCKET COSTS.

CARRUM HEALTH (CARRUM) – SURGERY BENEFIT PROGRAM

Carrum Health is a special surgery benefit that provides exclusive access to “Centers of Excellence.” These hospitals and doctors provide for an improved patient experience and top-quality, more affordable care. The Carrum Health Surgery Benefit is provided at no additional cost and is an option outside of your surgery benefit provided by your medical carrier. Please note HMO plans are not eligible to participate in the Carrum Surgery Benefit.



EMPLOYEE SERVICES

Personalized “Care Concierge” support – Helps guide patient through the process

Recovery – Personalized support through total care coordination

Access to top-Quality Surgeons – perform hundreds of surgeries

All medical expenses – covered for the patient**

Travel Expenses – covered for patient and companion*

Voluntary participation – Employee Initiates the service by phone or online

*IRS Rules a portion of the covered travel will be reported as taxable income to employee.

**IRS regulations on HSA plans the deductible applies but coinsurance is waived.

Eligible procedures include:

- Hip Replacement
- Knee replacement
- Cervical Spinal fusion
- Lumbar Spinal Fusion
- Coronary Bypass Surgery
- Bariatric (Weight Loss)
- Shoulder Repair
- Elbow Repair
- Wrist/Hand Repair
- Ankle/Foot Repair
- Pain Management

Additional procedures will become eligible on a regular basis.

CARRUM ONCOLOGY – BREAST CANCER TREATMENT/SECOND OPINION PROGRAM

Carrum has expanded services to now include Oncology Treatment and Second Opinion/guidance plan services for individuals diagnosed with Breast Cancer. The Carrum Oncology Benefit is provided at no additional cost and is an option outside of your cancer benefit provided by your medical carrier. Treatment and/or second opinion/guidance plan options are provided through City of Hope in Los Angeles. Travel expenses are included when treatment is required. Please note HMO plans are not eligible to participate in the Carrum Oncology Benefit.

THIS SUMMARY IS INTENDED TO COMPARE COVERAGE BENEFITS ONLY. THE ACTUAL PLAN CONTRACT SHOULD BE CONSULTED FOR A DETAILED DESCRIPTION OF COVERAGE BENEFITS AND LIMITATIONS.

HINGE HEALTH – VIRTUAL/DIGITAL PHYSICAL THERAPY SOLUTION

Hinge Health is a “no cost” digital Physical Therapy option to help prevent injury, prevent surgery, and address acute or chronic pain. Eligible plan participants will receive wearable devices free of charge.



Hinge Health pairs a complete clinical care team with advanced technology to deliver an all in one solution:

- **Dedicated physical therapist** for 1:1 video visits
- **Dedicated health coach** trained in motivation and behavioral support
- **Customized exercise therapy** with wearable sensors for real-time feedback
- **Wearable pain management technology** for immediate pain relief
- **Education** on lifestyle, condition and pain management
- **Expert Medical Opinion** with in-house orthopedic surgeons

LIVONGO BY TELADOC HEALTH – DIABETES CARE MANAGEMENT PROGRAM

Livongo is a virtual diabetes care management and monitoring program that provides active real-time care support from live health coaches using digital management tools. The Livongo benefit is provided at no additional cost and eligible participants will receive a free glucose test meter that connects with health coaches using cellular technology. Participants will also receive free test strips, whenever needed. Please note cellular connectivity is covered by Livongo at no cost. Kaiser HMO plan participants are not eligible to participate.



Individuals diagnosed as diabetic or pre-diabetic can learn more and sign-up at join.livongo.com/PRISM using the registration code **PRISM**.

GOTZOOM-STUDENT LOAN REPAYMENT PROGRAM

What's GotZoom?

- A company with a singular focus on Department of Education student loan repayment programs
- Seven-year performance record



Why We're Better?

Large student debt reduction achieved with federal repayment or forgiveness programs:

- Provides employee immediate relief
- Costs employer significantly less

Employer Benefits

- Retention: equates to a 5% - 20% raise
- Recruitment: 83% of millennials prefer organizations with a student loan benefit
- Value: 3-year ROI 140%

Employee Benefit

- Average student debt reduction of 65%
- Upfront visibility of savings (free loan status analysis and benefit summary)

THIS SUMMARY IS INTENDED TO COMPARE COVERAGE BENEFITS ONLY. THE ACTUAL PLAN CONTRACT SHOULD BE CONSULTED FOR A DETAILED DESCRIPTION OF COVERAGE BENEFITS AND LIMITATIONS.

MEDICAL BENEFIT RATES FOR 2025 – GUARANTEED UNTIL JANUARY 1, 2026

	PLAN	Employee	Employee + 1	Employee + 2 or More
AREA I - Northern CA: Bay Area Alameda, Amador, Contra Costa, Marin, Napa, Nevada, San Francisco, San Joaquin, San Mateo, Santa Clara, Santa Cruz, Solano, Sonoma, Sutter, Yolo, Yuba	Gold PPO	\$1,343.12	\$2,681.09	\$3,488.61
	Platinum PPO	\$1,467.75	\$2,930.35	\$3,814.09
	Silver PPO	\$962.02	\$1,928.16	\$2,502.90
	Bronze PPO	\$880.65	\$1,766.45	\$2,293.81
	EPO	\$1,612.98	\$3,224.93	\$4,192.10
	HDHP 10	\$1,101.07	\$2,203.17	\$2,862.37
	HDHP 20	\$949.66	\$1,898.29	\$2,467.88
	Access+ HMO 15	\$1,496.59	\$2,991.12	\$3,892.37
	Access+ HMO 20	\$1,390.50	\$2,782.03	\$3,614.27
	Kaiser HMO 15	\$1,276.17	\$2,522.47	\$3,268.19
	Kaiser HMO 20	\$1,229.82	\$2,428.74	\$3,151.80
AREA II - Northern CA: Other Counties Alpine, Butte, Calaveras, Colusa, Del Norte, Glenn, Humboldt, Lake, Lassen, Mariposa, Mendocino, Merced, Modoc, Mono, Monterey, Plumas, San Benito, Shasta, Sierra, Siskiyou, Stanislaus, Tehama, Trinity, Tuolumne	Gold PPO	\$1,303.98	\$2,610.02	\$3,391.79
	Platinum PPO	\$1,397.71	\$2,794.39	\$3,632.81
	Silver PPO	\$936.27	\$1,872.54	\$2,430.80
	Bronze PPO	\$857.99	\$1,713.92	\$2,226.86
	EPO	\$1,560.45	\$3,126.05	\$4,065.41
	HDHP 10	\$1,086.65	\$2,179.48	\$2,830.44
	HDHP 20	\$898.16	\$1,791.17	\$2,332.95
	Access+ HMO 15	\$1,511.01	\$3,018.93	\$3,925.33
	Access+ HMO 20	\$1,406.98	\$2,813.96	\$3,653.41
	Kaiser HMO 15	\$1,276.17	\$2,522.47	\$3,268.19
	Kaiser HMO 20	\$1,229.82	\$2,428.74	\$3,151.80
AREA III - Southern CA: Los Angeles Area Los Angeles, San Bernardino, Ventura	Gold PPO	\$1,110.34	\$2,211.41	\$2,874.73
	Platinum PPO	\$1,213.34	\$2,419.47	\$3,143.56
	Silver PPO	\$802.37	\$1,587.23	\$2,066.18
	Bronze PPO	\$733.36	\$1,455.39	\$1,892.11
	EPO	\$1,296.77	\$2,585.30	\$3,357.80
	HDHP 10	\$971.29	\$1,943.61	\$2,524.53
	HDHP 20	\$803.40	\$1,601.65	\$2,082.66
	Access+ HMO 15	\$1,164.93	\$2,329.86	\$3,024.08
	Access+ HMO 20	\$1,086.65	\$2,165.06	\$2,813.96
	Kaiser HMO 15	\$1,054.72	\$2,082.66	\$2,699.63
	Kaiser HMO 20	\$1,012.49	\$1,994.08	\$2,584.27

Rates shown are for active, early retiree and public officials.

MEDICAL BENEFIT RATES FOR 2025 – GUARANTEED UNTIL JANUARY 1, 2026

	PLAN	Employee	Employee + 1	Employee + 2 or More
AREA IV - Southern CA: Other Counties Fresno,* Imperial, Inyo, Kern, Kings, Madera, Riverside, Orange, San Diego, San Luis Obispo, Santa Barbara, Tulare *Fresno County: For Kaiser Active and Early Retiree rates please refer to Area VI rates per Kaiser Guidelines.	Gold PPO	\$1,189.65	\$2,370.03	\$3,075.58
	Platinum PPO	\$1,308.10	\$2,602.81	\$3,385.61
	Silver PPO	\$855.93	\$1,707.74	\$2,214.50
	Bronze PPO	\$783.83	\$1,565.60	\$2,029.10
	EPO	\$1,324.58	\$2,637.83	\$3,426.81
	HDHP 10	\$1,044.42	\$2,082.66	\$2,703.75
	HDHP 20	\$859.02	\$1,715.98	\$2,233.04
	Access+ HMO 15	\$1,283.38	\$2,566.76	\$3,328.96
	Access+ HMO 20	\$1,195.83	\$2,382.39	\$3,098.24
	Kaiser HMO 15	\$1,079.44	\$2,129.01	\$2,759.37
	Kaiser HMO 20	\$1,032.06	\$2,033.22	\$2,636.80
	AREA V - Out of State Early Retirees Only	Gold PPO	\$1,394.62	\$2,786.15
Platinum PPO		\$1,525.43	\$3,053.95	\$3,966.53
Silver PPO		\$1,002.19	\$2,003.35	\$2,600.75
Bronze PPO		\$917.73	\$1,835.46	\$2,383.42
EPO		\$1,629.46	\$3,256.86	\$4,236.39
HDHP 10		\$1,197.89	\$2,390.63	\$3,110.60
HDHP 20		\$981.59	\$1,961.12	\$2,550.28
Access+ HMO 15		N/A	N/A	N/A
Access+ HMO 20		N/A	N/A	N/A
Kaiser HMO 15		N/A	N/A	N/A
Kaiser HMO 20		N/A	N/A	N/A
AREA VI - Northern CA: Sacramento El Dorado, Placer, Sacramento *Fresno County Kaiser Active and Early Retiree Rates		Gold PPO	\$1,219.52	\$2,439.04
	Platinum PPO	\$1,333.85	\$2,668.73	\$3,465.95
	Silver PPO	\$879.62	\$1,760.27	\$2,289.69
	Bronze PPO	\$805.46	\$1,612.98	\$2,097.08
	EPO	\$1,425.52	\$2,855.16	\$3,706.97
	HDHP 10	\$1,071.20	\$2,147.55	\$2,790.27
	HDHP 20	\$884.77	\$1,768.51	\$2,296.90
	Access+ HMO 15	\$1,434.79	\$2,871.64	\$3,734.78
	Access+ HMO 20	\$1,331.79	\$2,669.76	\$3,469.04
	Kaiser HMO 15	\$1,261.75	\$2,493.63	\$3,231.11
	Kaiser HMO 20	\$1,216.43	\$2,405.05	\$3,114.72

Rates shown are for active, early retiree and public officials.

MEDICAL BENEFIT RATES FOR 2025 – GUARANTEED UNTIL JANUARY 1, 2026

MEDICARE COORDINATION OF BENEFITS (COB)

Medicare Supplemental Plans are designed specifically for retirees, their spouse and/or dependents enrolled in the SDRMA medical benefits program who are also enrolled in Parts A (hospital insurance), B (medical insurance) and D (prescription enrollment completed by Express Scripts) of Medicare. This plan is designed to help defray some of the costs for those members enrolled in Medicare, such as Medicare deductibles, co-pays and other costs. The rates shown in the table provide a number of cost options depending on the coverage needs of a retiree and their dependent(s). Each option includes additional rates for those members who need rates appropriate for a variety of combinations where one or two members of a household have Medicare and others do not.

The retiree and their spouse and/or dependents must enroll in Medicare Part A and Part B coverage at their own expense when they turn 65 to be able to continue their coverage under SDRMA. A Retiree and/or their spouse may be directly charged additional premiums by Medicare for Part D coverage if their income is above a certain level. The additional premium is referred to as the Medicare Income-Related Monthly Adjustment Amount (IRMAA). The retiree and/or spouse should contact Medicare for additional information about IRMAA.

To enroll in Medicare you must be at least age 65 or older - these rates are the same for out of state 65 or older members as well. SDRMA Medical Benefits Program coverages remain the same whether Medicare Supplemental Coverages are Primary or Secondary.

Medicare Supplemental Plans (EGWP)	Gold PPO - EGWP	Platinum PPO - EGWP	Silver PPO - EGWP	Bronze EPO - EGWP	EPO - EGWP
Single (Retiree with Medicare)	\$838.42	\$927.00	\$657.14	\$615.94	\$1,006.31
Two Party (Retiree + Dependent both with Medicare)	\$1,674.78	\$1,856.06	\$1,314.28	\$1,230.85	\$2,011.59
Family (All Medicare - reflects for 3 enrolled)	\$2,513.20	\$2,783.06	\$1,970.39	\$1,847.82	\$3,017.90
Two Party (1 Medicare, 1 Without)	\$2,181.54	\$2,394.75	\$1,619.16	\$1,496.59	\$2,619.29
Family (1 Medicare, 2 or more Without)	\$3,519.51	\$3,857.35	\$2,585.30	\$2,382.39	\$4,231.24
Family (2 Medicare, 1 or more Without)	\$3,017.90	\$3,323.81	\$2,276.30	\$2,111.50	\$3,624.57

* This rate increases for every family member enrolled in Medicare by the single Medicare rate.

EGWP (Part D) Prescription Program co-pays	Retail 31 Day	Retail 60 Day	Retail 90 Day	Mail 90 Day
Generic	\$5.00	\$10.00	\$15.00	\$10.00
Brand	\$20.00	\$40.00	\$60.00	\$40.00
Non Preferred	\$50.00	\$100.00	\$150.00	\$100.00

Please note that the above Rx co-pays are for the plans noted in the Medicare Supplemental Plans COB Rates table.

* Coordination of Benefits (COB): SDRMA insurance plans will coordinate with Medicare to determine which entity may or may not pay towards a particular service received by covered individuals under this plan. The coordination will determine how much of the expense Medicare covers (if any) and how much of the expense the SDRMA insurance carrier would cover. Medicare pays first and the SDRMA carrier will then pay additional monies towards the service if the carrier’s contracted payable amount is higher than Medicare’s contracted payable amount.

If Medicare’s contracted amount is less than the SDRMA carrier’s contracted amount, the SDRMA carrier will pay the difference between Medicare and the SDRMA carrier amount so that the provider is paid up to the SDRMA carrier limits through both parties combined. If Medicare’s contracted amount is the same or covers a higher amount than the SDRMA carrier, the SDRMA carrier will not pay any monies towards the service and will consider payment made by Medicare to be payment in full. When services are considered covered by Medicare and initial payments are made by Medicare, the SDRMA carrier’s co-pays, coinsurance, and/or deductible will not apply.

If a service is not covered by Medicare, but the service is covered by the SDRMA carrier’s plan, the claim will be paid exclusively through the SDRMA carrier’s plan. If a service is not considered covered by Medicare and therefore no initial payment is made by Medicare, the SDRMA carrier’s co-pays, coinsurance, and/or deductible will apply.



MEDICAL BENEFIT RATES FOR 2025 – GUARANTEED UNTIL JANUARY 1, 2026
RATES WILL BE AVAILABLE IN AUGUST

Kaiser Permanente Senior Advantage (KPSA) HMO with Part D Rx Coverage*	Kaiser 15 Area I, Area II and Area VI Rates	Kaiser 20 Area I, Area II and Area VI Rates	Kaiser 15 Area III and Area IV** Rates	Kaiser 20 Area III and Area IV** Rates
Single (Medicare)	N/A	N/A	N/A	N/A
Two Party (Both with Medicare)	N/A	N/A	N/A	N/A
Two Party (1 Medicare, 1 Without)	N/A	N/A	N/A	N/A
Family (1 Medicare, 2 or more Without)	N/A	N/A	N/A	N/A
Family (2 Medicare, 1 or more Without)	N/A	N/A	N/A	N/A

* The KPSA plan is for agencies that offer Medicare retirees the Kaiser plan option. The KPSA plan is for Kaiser retirees, their spouse and/or dependents of retirees that are enrolled in Medicare Part A and Part B. If a retiree, their spouse and/or dependent have a combination rate where a participant in their family does not have Medicare, the participant without Medicare will be covered under the Kaiser HMO 15 or Kaiser HMO 20 plan depending on the agency's offering.

** Per Kaiser Guidelines Fresno County Kaiser Rates are under Area VI Rates

KPSA (Part D) Prescription Program co-pays	Retail 30 Day Supply	Retail 31-60 Day Supply	Retail 61-100 Day Supply	Mail Order 30 Day Supply	Mail Order 31-100 Day Supply
Generic	\$5.00	\$10.00	\$15.00	\$5.00	\$10.00
Brand	\$20.00	\$40.00	\$60.00	\$20.00	\$40.00

For further details of the Kaiser Permanente Senior Advantage (KPSA) HMO plan please refer to page 10.

Please note that the above Rx co-pays are for the plans noted in the Kaiser Permanente Senior Advantage (KPSA) HMO with Part D Rx Coverage rate table.



ANCILLARY COVERAGES SUMMARY

DELTA DENTAL PPO – RATES GUARANTEED UNTIL JANUARY 1, 2026

*See page 3, note 14 for Plan Selections and Combination Guidelines

DENTAL BENEFITS	Low Plan	
	PPO	Non-PPO
Calendar Year Maximum	\$1,000	\$500
	(Per patient per calendar year)	
Calendar Year Deductible Individual / Family	\$50 / \$150 (Waived for Preventive)	
Age Limitations	Dependents to Age 26	
Diagnostic and Preventive	100%	100%
Oral Exam		
Routine Cleaning		
X-Rays		
Fluoride Treatment		
Space Maintainers		
Specialist Consultations		
Basic Services	80%	80%
Fillings		
Endodontics (Root Canal)		
Periodontics (Gum Treatment)		
Tissue Removal (Biopsy)		
Extractions & Other Oral Surgery		
Sealants		
Major Services	50%	50%
Crown Repair		
Inlays, Onlays		
Cast Restorations		
Bridges		
Partial and Full Dentures		
Orthodontics	Not Covered	
Eligible for Benefit	Not Covered	
Lifetime Maximum		

(Employer Contributes 51-100% of dependent cost):

Rates	
Employee Only	\$30.69
Employee + 1 Dependent	\$52.43
Employee + 2 or More Dependents	\$84.56

(Employer Contributes 0-50% of dependent cost):

Rates	
Employee Only	\$30.69
Employee + 1 Dependent	\$55.83
Employee + 2 or More Dependents	\$92.39

THIS SUMMARY IS INTENDED TO COMPARE COVERAGE BENEFITS ONLY. THE ACTUAL PLAN CONTRACT SHOULD BE CONSULTED FOR A DETAILED DESCRIPTION OF COVERAGE BENEFITS AND LIMITATIONS.

DELTA DENTAL PPO – RATES GUARANTEED UNTIL JANUARY 1, 2026

*See page 3, note 14 for Plan Selections and Combination Guidelines

DENTAL BENEFITS	Medium Plan		High Plan	
	PPO	Non-PPO	PPO	Non-PPO
Calendar Year Maximum	\$1,500	\$1,000	\$2,000	\$1,250
	(Per patient per calendar year)		(Per patient per calendar year)	
Calendar Year Deductible Individual / Family	\$50 / \$150 (Waived for Preventive)		\$50 / \$150 (Waived for Preventive)	
Age Limitations	Dependents to Age 26		Dependents to Age 26	
Diagnostic and Preventive	100%	100%	100%	100%
Oral Exam				
Routine Cleaning				
X-Rays				
Fluoride Treatment				
Space Maintainers				
Specialist Consultations				
Basic Services	80%	80%	80%	80%
Fillings				
Endodontics (Root Canal)				
Periodontics (Gum Treatment)				
Tissue Removal (Biopsy)				
Extractions & Other Oral Surgery				
Sealants				
Major Services	60%	60%	80%	80%
Crown Repair				
Inlays, Onlays				
Cast Restorations				
Bridges				
Partial and Full Dentures				
Orthodontics	50%	50%	50%	50%
Eligible for Benefit	Child & Adult		Child & Adult	
Lifetime Maximum	\$500		\$1,000	

(Employer Contributes 51-100% of dependent cost):

Rates		
Employee Only	\$41.61	\$53.46
Employee + 1 Dependent	\$70.56	\$89.92
Employee + 2 or More Dependents	\$110.62	\$136.68

(Employer Contributes 0-50% of dependent cost):

Rates		
Employee Only	\$41.61	\$53.46
Employee + 1 Dependent	\$74.98	\$95.17
Employee + 2 or More Dependents	\$121.13	\$149.66

THIS SUMMARY IS INTENDED TO COMPARE COVERAGE BENEFITS ONLY. THE ACTUAL PLAN CONTRACT SHOULD BE CONSULTED FOR A DETAILED DESCRIPTION OF COVERAGE BENEFITS AND LIMITATIONS.

DENTAL HMO BENEFITS

*See page 3, note 14 for Plan Selections and Combination Guidelines

DENTAL HMO BENEFITS	DeltaCare Plan 10A Participating Providers (You Pay)	DeltaCare Plan 11A Participating Providers (You Pay)	DeltaCare Plan 12A Participating Providers (You Pay)
Diagnostic and Preventive			
Periodic Oral Evaluation	No Charge	No Charge	No Charge
X-Rays	No Charge	No Charge	No Charge
Teeth Cleaning	No Charge	No Charge	No Charge
Topical Flouride	No Charge	No Charge	No Charge
Sealants - per tooth	\$5	\$10	\$10
Restorative			
Amalgam Filling 1-4 Surfaces	\$0	\$0	\$5 - \$20
Resin - one surface, anterior	\$0	\$0	\$22
Endodontics (Root Canal Therapy)			
Pulp Cap	No Charge	No Charge	No Charge
Therapeutic Pulpotomy	\$0	\$0	\$15
Root Canal Therapy - anterior	\$45	\$55	\$85
Periodontics			
Gingivectomy - per quadrant	\$80	\$130	\$135
Osseous Surgery - per quadrant	\$175	\$280	\$300
Scaling and Root Planning - per quadrant	\$0	\$25	\$40
Oral Surgery			
Extractions - Impacted tooth: soft tissue	\$25	\$50	\$55
Extractions - Impacted tooth: partial bony	\$50	\$70	\$75
Extractions - Impacted tooth: full bony	\$70	\$90	\$95
Prosthodontics			
Complete - Upper or Lower	\$100	\$145	\$215
Immediate - Upper or Lower	\$120	\$165	\$235
Partial Denture - Upper or Lower	\$120	\$160	\$240
Crown and Bridge			
Inlay / Onlay	\$0	\$0	\$45 - \$55
Crown - Porcelain/Ceramic Substrate	\$195	\$240	\$295
Crown - Porcelain Fused to High Noble Metal	\$195	\$240	\$295
Crown - Full Cast High Noble Metal	\$170	\$210	\$260
Orthodontics - comprehensive			
Child to age 19	\$1,700	\$1,700	\$1,700
Member over age 19	\$1,900	\$1,900	\$1,900

DENTAL HMO RATES – RATES GUARANTEED UNTIL JANUARY 1, 2027

	PLAN	Employee	Employee + 1	Employee + 2 or More
Region I Los Angeles, Tulare, Ventura	DeltaCare 10A	\$19.98	\$35.64	\$52.53
	DeltaCare 11A	\$17.30	\$30.80	\$45.11
	DeltaCare 12A	\$16.79	\$29.77	\$43.88
Region II Alameda, El Dorado, Fresno, Imperial, Kern, Kings, Lake, Madera, Monterey, Napa, Orange, Riverside, Sacramento, San Bernardino, San Diego, San Mateo, Santa Clara	DeltaCare 10A	\$19.98	\$35.64	\$52.53
	DeltaCare 11A	\$17.30	\$30.80	\$45.11
	DeltaCare 12A	\$16.79	\$29.77	\$43.88
Region III Alpine, Amador, Calaveras, Colusa, Contra Costa, Del Norte, Glenn, Inyo, Lassen, Mariposa, Mendocino, Merced, Modoc, Mono, Nevada, Placer, Plumas, San Benito, San Francisco, San Joaquin, Sierra, Siskiyou, Solano, Sonoma, Stanislaus, Tehama, Trinity, Tuolumne, Yuba	DeltaCare 10A	\$20.70	\$36.87	\$54.38
	DeltaCare 11A	\$17.92	\$31.83	\$46.76
	DeltaCare 12A	\$17.30	\$30.69	\$45.22
Region IV Humboldt, Marin, Santa Barbara, Santa Cruz, Shasta, Sutter, Yolo	DeltaCare 10A	\$21.32	\$37.90	\$55.93
	DeltaCare 11A	\$18.44	\$32.75	\$48.20
	DeltaCare 12A	\$17.72	\$31.42	\$46.25
Region V Butte, San Luis Obispo	DeltaCare 10A	\$41.61	\$71.48	\$105.47
	DeltaCare 11A	\$38.73	\$66.23	\$97.64
	DeltaCare 12A	\$37.90	\$64.79	\$95.48

VSP VISION – RATES GUARANTEED UNTIL JANUARY 1, 2026

*See page 3, note 14 for Plan Selections and Combination Guidelines

VISION BENEFITS	Option 1		Option 2	
	In-Network	Non-Network	In-Network	Non-Network
Co-pay	\$25 for Exam and/or Materials		\$25 for Exam and/or Materials	
Exam	Covered after Co-pay	Plan pays up to: \$50	Covered after Co-pay	Plan pays up to: \$50
Lenses				
Single	Covered after Co-pay	\$50	Covered after Co-pay	\$50
Bifocal	Covered after Co-pay	\$75	Covered after Co-pay	\$75
Trifocal	Covered after Co-pay	\$100	Covered after Co-pay	\$100
Frames	\$130 Allowance 20% off amount over allowance	\$70	\$130 Allowance 20% off amount over allowance	\$70
Contact Lenses - Elective	\$130 Allowance	\$105	\$130 Allowance	\$105
Contact Lenses - Medically Necessary	Covered after Co-pay	\$210	Covered after Co-pay	\$210
Contact Exam and Fitting	Up to \$60	\$0	Up to \$60	\$0
Frequency of Services				
Eye Examination	12 months		12 months	
Lenses	24 months		12 months	
Frames	24 months		24 months	
Contact Lenses ¹	24 months		12 months	
Rates				
Employee Only	\$6.59		\$7.62	
Employee + 1 Dependent	\$12.77		\$14.83	
Employee + 2 or More Dependents	\$20.19		\$23.48	

¹ Contact lenses are in lieu of spectacle lenses and frames

THIS SUMMARY IS INTENDED TO COMPARE COVERAGE BENEFITS ONLY. THE ACTUAL PLAN CONTRACT SHOULD BE CONSULTED FOR A DETAILED DESCRIPTION OF COVERAGE BENEFITS AND LIMITATIONS.

VSP VISION – RATES GUARANTEED UNTIL JANUARY 1, 2026

*See page 3, note 14 for Plan Selections and Combination Guidelines

VISION BENEFITS	Option 3		Option 4		Option 5	
	In-Network	Non-Network	In-Network	Non-Network	In-Network	Non-Network
Co-pay	\$15 for Exam and/or Materials		\$25 for Exam and/or Materials		\$0 for Exam and/or Materials	
Exam	Covered after Co-pay	Plan pays up to: \$50	Covered after Co-pay	Plan pays up to: \$50	Covered after Co-pay	Plan pays up to: \$50
Lenses						
Single	Covered after Co-pay	\$50	Covered after Co-pay	\$50	Covered	\$50
Bifocal	Covered after Co-pay	\$75	Covered after Co-pay	\$75	Covered	\$75
Trifocal	Covered after Co-pay	\$100	Covered after Co-pay	\$100	Covered	\$100
Frames	\$130 Allowance 20% off amount over allowance	\$70	\$130 Allowance 20% off amount over allowance	\$70	\$130 Allowance 20% off amount over allowance	\$70
Contact Lenses - Elective	\$130 Allowance	\$105	\$130 Allowance	\$105	\$130 Allowance	\$105
Contact Lenses - Medically Necessary	Covered after Co-pay	\$210	Covered after Co-pay	\$210	No Co-pay	\$210
Contact Exam and Fitting	Up to \$60	\$0	Up to \$60	\$0	Up to \$60	\$0
Frequency of Services						
Eye Examination	12 months		12 months		12 months	
Lenses	12 months		12 months		12 months	
Frames	24 months		12 months		12 months	
Contact Lenses ¹	12 months		12 months		12 months	
Rates						
Employee Only	\$8.03		\$10.92		\$17.41	
Employee + 1 Dependent	\$15.45		\$21.42		\$34.20	
Employee + 2 or More Dependents	\$24.62		\$34.09		\$54.80	

¹ Contact lenses are in lieu of spectacle lenses and frames

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VOYA FINANCIAL BASIC LIFE AND AD&D – RATES GUARANTEED UNTIL JULY 1, 2027

For Groups with 10(+) Employee lives Basic Life and AD&D Benefits			For Groups with less than 10 Employee lives Basic Life and AD&D Benefits		
Eligibility:	All Eligible Employees working at least 20 hrs/wk		Eligibility:	All Eligible Employees working at least 20 hrs/wk	
Life Benefits:	Groups may elect a flat amount of: \$10,000-\$200,000 in \$10,000 increments Basic life benefits have to be defined by class of employee; i.e. City manager, confidential employees, etc. or All employees as one class or 1x Annual Salary or 2x Annual Salary		Life Benefits:	Groups may elect a flat amount of: \$10,000-\$200,000 in \$10,000 increments Basic life benefits have to be defined by class of employee; i.e. City manager, confidential employees, etc. or All employees as one class or 1x Annual Salary or 2x Annual Salary	
AD&D Benefits:	Same as Life		AD&D Benefits:	Same as Life	
Guaranteed Issue Amount	\$200,000		Guaranteed Issue Amount	\$200,000	
Benefit Reduction Formula	Age	% of Original Benefit	Benefit Reduction Formula	Age	% of Original Benefit
	65	65%		65	65%
	70	50%		70	50%
Accelerated Death Benefit	50% of Life Benefits if less than 6 Month Life Expectancy		Accelerated Death Benefit	50% of Life Benefits if less than 6 Month Life Expectancy	
Waiver of Premium	Included		Waiver of Premium	Included	
Seat Belt Benefit (AD&D)	Included		Seat Belt Benefit (AD&D)	Included	
Basic Life and AD&D Rate per \$1,000:	\$0.272*		Basic Life and AD&D Rate per \$1,000: Under Age 30	\$0.202*	
			Basic Life and AD&D Rate per \$1,000: Age 30-39	\$0.264*	
			Basic Life and AD&D Rate per \$1,000: Age 40-49	\$0.368*	
			Basic Life and AD&D Rate per \$1,000: Over Age 49	\$0.507*	

Example Calculation

Sample for 10+ Employee lives

1 employee with 100,000 of life insurance

Volume X rate/1000

100,000 X 0.272/1000 = \$27.20

* Rates provided on Ancillary invoice may vary slightly because of rounding.

Entities must contribute a minimum of 75% of the cost for active employees only. See page 3, note 3 for underwriting guideline of entity contribution for active employees.

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VOYA FINANCIAL SUPPLEMENTAL LIFE – RATES GUARANTEED UNTIL JULY 1, 2027

Supplemental Life Benefits*		
Eligibility	All Eligible Employees working at least 20 hrs/wk	
Employee Benefit		
Minimum	\$20,000	
Maximum	\$250,000	
Increments of:	\$10,000	
Guaranteed Issue Amount	Under Age 60: \$100,000 Age 60 and Over: \$50,000	
Spouse Benefit	Not to Exceed 50% of Employee's Life Benefit	
Minimum	\$20,000	
Maximum	\$125,000	
Increments of:	\$5,000	
Guaranteed Issue Amount	\$25,000	
Dependent Child(ren) Benefit		
Minimum	\$5,000	
Maximum	\$10,000	
Increments of:	\$5,000	
Guaranteed Issue Amount	\$10,000	
Benefit Duration	Age	% of Original Benefit
	65	65%
	70	50%
Waiver of Premium	Included	
Portability	Included	
	Rates	
Rates per \$1,000	Employee Rate (AD&D)	Spouse Rate (1) (2) (No AD&D)
Under age 25	\$0.117**	\$0.072**
Age 25-29	\$0.117**	\$0.072**
Age 30-34	\$0.148**	\$0.103**
Age 35-39	\$0.169**	\$0.124**
Age 40-44	\$0.220**	\$0.175**
Age 45-49	\$0.303**	\$0.258**
Age 50-54	\$0.488**	\$0.443**
Age 55-59	\$0.787**	\$0.742**
Age 60-64	\$1.178**	\$1.133**
Age 65-69	\$2.208**	\$2.163**
Over age 70	\$3.547**	\$3.502**
Dependent Child Rate per \$1,000	\$0.206**	\$0.206**

(1) The age of the employee is used when calculating the premium for Supplemental Life for the spouse.

(2) The spouse or dependents can only enroll in Supplemental Life if the employee is enrolled in Supplemental Life.

* Supplemental Life is only available if the Entity is enrolled in VOYA Financial Basic Life and AD&D.

** Rates provided on Ancillary Invoice may vary slightly because of rounding.

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VOYA FINANCIAL SHORT TERM DISABILITY – RATES GUARANTEED UNTIL JULY 1, 2027

For Groups with 10(+) Employee lives			
Short-Term Disability Benefits	Option 1	Option 2	Option 3
Eligibility:	All Eligible Employees working at least 20 hrs/wk	All Eligible Employees working at least 20 hrs/wk	All Eligible Employees working at least 20 hrs/wk
Elimination Period:			
Accident	7 Days	7 Days	7 Days
Illness	7 Days	7 Days	7 Days
Weekly Benefit Percentage	60%	60%	60%
Minimum Weekly Benefit	\$50	\$50	\$50
Maximum Weekly Benefit	\$1,252	\$1,500	\$1,500
Definition of Disability	Non-Occupational	Non-Occupational	Non-Occupational
Maximum Benefit Duration	52 Weeks	26 Weeks	13 Weeks
Benefit Integration	Offset Applies	Offset Applies	Offset Applies
Pre-Existing Condition	None	None	None
Rate per \$10 weekly benefit	Option 1	Option 2	Option 3
Rate (per \$10 weekly benefit)	\$0.79*	\$0.62*	\$0.46*

Example Calculations

	Option 1	Option 2	Option 3
Annual Salary	\$50,000.00	\$50,000.00	\$50,000.00
Weekly salary (annual/52)	\$961.54	\$961.54	\$961.54
Covered weekly salary (weekly X .60)	\$576.92	\$576.92	\$576.92
Divide by 10 (covered weekly/10)	\$57.69	\$57.69	\$57.69
Multiply above by Premium Rate (.79*, .62*, .46*)	\$45.58	\$35.77	\$26.54

Covered weekly must be capped if it surpasses maximum weekly benefit

	Option 1	Option 2	Option 3
Annual Salary	\$150,000.00	\$150,000.00	\$150,000.00
Weekly salary (annual/52)	\$2,884.62	\$2,884.62	\$2,884.62
Covered weekly salary (weekly X .60)	\$1,730.77	\$1,730.77	\$1,730.77
Capped maximum weekly coverage/benefit	\$1,252.00	\$1,500.00	\$1,500.00
Divide capped by 10 (capped weekly/10)	\$125.20	\$150.00	\$150.00
Multiply above by Premium Rate (.79*, .62*, .46*)	\$98.91	\$93.00	\$69.00

Definition:

Elimination period – Benefits begin the day after the elimination period ends.

* Rates provided on Ancillary invoice may vary slightly because of rounding.

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VOYA FINANCIAL SHORT TERM DISABILITY – RATES GUARANTEED UNTIL JULY 1, 2027

For Groups with less than 10 Employee lives			
Short-Term Disability Benefits	Option 1	Option 2	Option 3
Eligibility:	All Eligible Employees working at least 20 hrs/wk	All Eligible Employees working at least 20 hrs/wk	All Eligible Employees working at least 20 hrs/wk
Elimination Period:			
Accident	7 Days	7 Days	7 Days
Illness	7 Days	7 Days	7 Days
Weekly Benefit Percentage	60%	60%	60%
Minimum Weekly Benefit	\$50	\$50	\$50
Maximum Weekly Benefit	\$1,252	\$1,500	\$1,500
Definition of Disability	Non-Occupational	Non-Occupational	Non-Occupational
Maximum Benefit Duration	52 Weeks	26 Weeks	13 Weeks
Benefit Integration	Offset Applies	Offset Applies	Offset Applies
Pre-Existing Condition	None	None	None
Age Banded Rates	Option 1	Option 2	Option 3
Rate per \$10: Under age 30	\$0.88*	\$0.67*	\$0.50*
Rate per \$10: 30-34	\$0.90*	\$0.68*	\$0.52*
Rate per \$10: 35-39	\$0.67*	\$0.52*	\$0.38*
Rate per \$10: 40-44	\$0.50*	\$0.39*	\$0.30*
Rate per \$10: 45-49	\$0.57*	\$0.44*	\$0.34*
Rate per \$10: 50-54	\$0.68*	\$0.54*	\$0.40*
Rate per \$10: 55-59	\$0.93*	\$0.72*	\$0.55*
Rate per \$10: 60-64	\$1.10*	\$0.87*	\$0.64*
Rate per \$10: 65+	\$1.31*	\$1.03*	\$0.75*

Example Calculations

	Option 1	Option 2	Option 3
Annual Salary	\$50,000.00	\$50,000.00	\$50,000.00
Weekly salary (annual/52)	\$961.54	\$961.54	\$961.54
Covered weekly salary (weekly X .60)	\$576.92	\$576.92	\$576.92
Divide by 10 (covered weekly/10)	\$57.69	\$57.69	\$57.69
Multiply above by Premium Rate	\$45.58	\$35.77	\$26.54

Covered weekly must be capped if it surpasses maximum weekly benefit

	Option 1	Option 2	Option 3
Annual Salary	\$150,000.00	\$150,000.00	\$150,000.00
Weekly salary (annual/52)	\$2,884.62	\$2,884.62	\$2,884.62
Covered weekly salary (weekly X .60)	\$1,730.77	\$1,730.77	\$1,730.77
Capped maximum weekly coverage/benefit	\$1,252.00	\$1,500.00	\$1,500.00
Divide capped by 10 (capped weekly/10)	\$125.20	\$150.00	\$150.00
Multiply above by Premium Rate	\$98.91	\$93.00	\$69.00

* Rates provided on Ancillary invoice may vary slightly because of rounding.

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VOYA FINANCIAL LONG TERM DISABILITY – RATES GUARANTEED UNTIL JULY 1, 2027

For Groups with 10(+) Employee lives		
Long Term Disability Benefits	Option 1	Option 2
Eligibility:	All Eligible Employees working at least 20 hrs/wk	All Eligible Employees working at least 20 hrs/wk
Elimination Period	90 Days (1)	180 Days (2)
Monthly Benefit Percentage	60%	60%
Maximum Monthly Benefit	\$5,000	\$5,000
Own Occupation Timeframe or Coverage Period	24 Months	24 Months
Disability Earnings Test	80%	80%
Definition of Disability	Earnings & Occupation	Earnings & Occupation
Recurrent Disabilities	6 Months	6 Months
Mental Health/Substance Abuse Limitations	24 Months	24 Months
Maximum Benefit Duration	To Age 65 or SSNRA	To Age 65 or SSNRA
Pre-Existing Condition	3/12	3/12
Rates	Option 1 – 90 days	Option 2 – 180 days
Rate per \$100	\$0.485*	\$0.365*

Example Calculation

Monthly Covered Salary X Rate/100

Monthly Covered Salary = Annual Salary/12

50,000/12 = \$4,166

\$4,166 (monthly covered salary) X 0.485 (rate)/100 = 20.21

(1) Benefit begins after 90 days

(2) Benefit begins after 180 days

Definitions:

Elimination Period – Benefits begin the day after the elimination period ends.

Own Occupation Timeframe or Coverage Period – Employee's disability will be evaluated on their ability to perform their own occupations to a certain degree.

Recurrent Disabilities – Refers to the instance where an employee recovers temporarily from a disability and returns to work, but then the disability resurfaces. If the disability resurfaces within a set time frame, the elimination period does not have to be satisfied again.

* Rates provided on Ancillary invoice may vary slightly because of rounding.

NOTE: THIS SUMMARY IS FOR INFORMATIONAL PURPOSE ONLY. IT DOES NOT AMEND, EXTEND, OR ALTER THE CURRENT POLICY IN ANY WAY. IN THE EVENT INFORMATION IN THIS SUMMARY DIFFERS FROM THE PLAN DOCUMENT, THE PLAN DOCUMENT WILL PREVAIL.

THIS SUMMARY IS INTENDED TO COMPARE COVERAGE BENEFITS ONLY. THE ACTUAL PLAN CONTRACT SHOULD BE CONSULTED FOR A DETAILED DESCRIPTION OF COVERAGE BENEFITS AND LIMITATIONS.

VOYA FINANCIAL LONG TERM DISABILITY – RATES GUARANTEED UNTIL JULY 1, 2027

For Groups with less than 10 Employee lives		
Long Term Disability Benefits	Option 1	Option 2
Eligibility:	All Eligible Employees working at least 20 hrs/wk	All Eligible Employees working at least 20 hrs/wk
Elimination Period	90 Days (1)	180 Days (2)
Monthly Benefit Percentage	60%	60%
Maximum Monthly Benefit	\$5,000	\$5,000
Own Occupation Timeframe or Coverage Period	24 Months	24 Months
Disability Earnings Test	80%	80%
Definition of Disability	Earnings & Occupation	Earnings & Occupation
Recurrent Disabilities	6 Months	6 Months
Mental Health/Substance Abuse Limitations	24 Months	24 Months
Maximum Benefit Duration	To Age 65 or SSNRA	To Age 65 or SSNRA
Pre-Existing Condition	3/12	3/12
Age Banded Rates	Option 1 – 90 days	Option 2 – 180 days
Rate per \$100: Under age 25	\$0.131*	\$0.103*
Rate per \$100: Age 25-29	\$0.177*	\$0.130*
Rate per \$100: Age 30-34	\$0.225*	\$0.168*
Rate per \$100: Age 35-39	\$0.289*	\$0.214*
Rate per \$100: Age 40-44	\$0.374*	\$0.280*
Rate per \$100: Age 45-49	\$0.485*	\$0.365*
Rate per \$100: Age 50-54	\$0.634*	\$0.476*
Rate per \$100: Age 55-59	\$0.830*	\$0.625*
Rate per \$100: Over age 60	\$1.083*	\$0.812*

Example Calculation

Example based on an individual under age 25
 Monthly Covered Salary X Rate/100
 Monthly Covered Salary = Annual Salary/12
 50,000/12 = \$4,166
 \$4,166 (monthly covered salary) X 0.131 (rate)/100 = 5.46

- (1) Benefit begins after 90 days
- (2) Benefit begins after 180 days

Definitions:

Elimination Period – Benefits begin the day after the elimination period ends.

Own Occupation Timeframe or Coverage Period – Employee’s disability will be evaluated on their ability to perform their own occupations to a certain degree.

Recurrent Disabilities – Refers to the instance where an employee recovers temporarily from a disability and returns to work, but then the disability resurfaces. If the disability resurfaces within a set time frame, the elimination period does not have to be satisfied again.

* Rates provided on Ancillary invoice may vary slightly because of rounding.

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CONCERN AND CONCERN+ EMPLOYEE ASSISTANCE PROGRAMS

Employee Assistance Program	Concern Standard Plan-Rates Guaranteed Until July 1, 2026	Concern+ First Responder Plan-Rates Guaranteed Until January 1, 2025
Number of Sessions/Frequency	3 Face to Face, telephonic/web-video, live chat sessions per incident per member	10 Face to Face, telephonic/web-video, live chat sessions per incident per member
Employee Services	Telephonic Counseling & Referral for Counselling Sessions	Telephonic Counseling & Referral for Counselling Sessions
Work Life	Life Management Services	Life Management Services
Legal	Legal Referral Service - One 30 minute session and 25% discount if attorney retained	Legal Referral Service - One 30 minute session and 25% discount if attorney retained
Dependent Care	Child & Elder Care Referral Service	Child & Elder Care Referral Service
Financial	Up to two 30 minute sessions - Financial Consultations to include Pre-retirement and tax consultations	Up to two 30 minute sessions - Financial Consultations to include Pre-retirement and tax consultations
Parent Coaching	3 telephonic sessions/year (60 minutes initial/30 minutes follow-up)	3 telephonic sessions/year (60 minutes initial/30 minutes follow-up)
Employer Services		
Brown Bag Seminars	150 hours/year (pooled)	\$400/hour (culturally competent trainers)
CISD – Critical Incident Stress Debriefing	150 hours/year (pooled)	\$450/hour (culturally competent trainers)
Management Consultations	Unlimited	Unlimited
Management Training	Included w/Brown Bag Seminars	\$400/hour (culturally competent trainers)
Virtual Orientation	No Limits	No Limits
Reports	Annual Utilization Reports	Annual Utilization Reports
Newsletter and Collateral Materials	Yes, No Charge	Yes, No Charge
Internet Service	employees.concernhealth.com	employees.concernhealth.com
Identity Theft Assistance	60-minute free consultation with a trained fraud resolution specialist	60-minute free consultation with a trained fraud resolution specialist
Substance Abuse Professional	10 Visits (no additional charge)	10 Visits (no additional charge)
EAP Rate – Per Employee Per Month	\$3.32	\$10.85

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CalPERS 2025 Regional Health Premiums (Actives and Annuitants)

Effective Date: January 1, 2025

Region 2*

Fresno, Imperial, Inyo, Kern, Kings, Madera, Orange, San Diego, San Luis Obispo, Santa Barbara, Tulare, Ventura

Basic Monthly Premiums (B)

Plan	Subscriber	Plan Code	Party Code	Party Rate	Subscriber & 1 Dependent	Plan Code	Party Code	Party Rate	Subscriber & 2+ Dependents	Plan Code	Party Code	Party Rate
Anthem Blue Cross Select HMO	\$919.00	507	1	1	\$1,838.00	507	2	2	\$2,389.40	507	3	3
Anthem Blue Cross Traditional HMO	\$1,110.97	510	1	1	\$2,221.94	510	2	2	\$2,888.52	510	3	3
Blue Shield Access+ HMO	\$948.53	526	1	1	\$1,897.06	526	2	2	\$2,466.18	526	3	3
Blue Shield Access+ EPO	\$948.53	029	1	1	\$1,897.06	029	2	2	\$2,466.18	029	3	3
Blue Shield Trio HMO	\$909.10	088	1	1	\$1,818.20	088	2	2	\$2,363.66	088	3	3
Health Net Salud y Más	\$823.49	531	1	1	\$1,646.98	531	2	2	\$2,141.07	531	3	3
Kaiser Permanente	\$944.34	534	1	1	\$1,888.68	534	2	2	\$2,455.28	534	3	3
Peace Officers Research Assoc of CA	\$970.00	593	1	1	\$1,951.00	593	2	2	\$2,484.00	593	3	3
PERS Gold	\$864.75	649	1	1	\$1,729.50	649	2	2	\$2,248.35	649	3	3
PERS Platinum	\$1,258.76	658	1	1	\$2,517.52	658	2	2	\$3,272.78	658	3	3
Sharp Performance Plus	\$868.45	575	1	1	\$1,736.90	575	2	2	\$2,257.97	575	3	3
UnitedHealthcare SignatureValue Alliance	\$890.66	577	1	1	\$1,781.32	577	2	2	\$2,315.72	577	3	3
UnitedHealthcare SignatureValue Harmony	\$819.64	399	1	1	\$1,639.28	399	2	2	\$2,131.06	399	3	3

Supplement/Managed Medicare Monthly Premiums (M)

Plan	Subscriber	Plan Code	Party Code	Party Rate	Subscriber & 1 Dependent	Plan Code	Party Code	Party Rate	Subscriber & 2+ Dependents	Plan Code	Party Code	Party Rate
Anthem Medicare Preferred PPO	\$487.56	516	1	4	\$975.12	516	2	5	\$1,462.68	516	3	6
Anthem Medicare Preferred PPO with Dental/Vision ¹	\$487.56	513	1	4	\$975.12	513	2	5	\$1,462.68	513	3	6
Anthem Medicare Preferred PPO	\$487.56	038	1	4	\$975.12	038	2	5	\$1,462.68	038	3	6
Anthem Medicare Preferred PPO with Dental/Vision ¹	\$487.56	074	1	4	\$975.12	074	2	5	\$1,462.68	074	3	6
Blue Shield Medicare PPO	\$448.28	012	1	4	\$896.56	012	2	5	\$1,344.84	012	3	6
Blue Shield Medicare PPO with Dental/Vision ²	\$448.28	017	1	4	\$896.56	017	2	5	\$1,344.84	017	3	6
Kaiser Permanente Senior Advantage	\$343.08	537	1	4	\$686.16	537	2	5	\$1,029.24	537	3	6
Kaiser Permanente Senior Advantage with Dental ³	\$343.08	543	1	4	\$686.16	543	2	5	\$1,029.24	543	3	6
Kaiser Permanente Senior Advantage Summit	\$408.31	631	1	4	\$816.62	631	2	5	\$1,224.93	631	3	6
Kaiser Permanente Senior Advantage Summit with Dental ³	\$408.31	637	1	4	\$816.62	637	2	5	\$1,224.93	637	3	6
Peace Officers Research Assoc of CA Medicare Supplement	\$507.00	596	1	4	\$1,014.00	596	2	5	\$1,521.00	596	3	6
PERS Gold Medicare Supplement	\$546.13	652	1	4	\$1,092.26	652	2	5	\$1,638.39	652	3	6
PERS Platinum Medicare Supplement	\$584.70	662	1	4	\$1,169.40	662	2	5	\$1,754.10	662	3	6
Sharp Direct Advantage HMO	\$272.44	024	1	4	\$544.88	024	2	5	\$817.32	024	3	6
Sharp Direct Advantage HMO with Dental ⁴	\$272.44	026	1	4	\$544.88	026	2	5	\$817.32	026	3	6
UnitedHealthcare Group Medicare Advantage PPO	\$442.25	580	1	4	\$884.50	580	2	5	\$1,326.75	580	3	6
UnitedHealthcare Group Medicare Advantage PPO with Dental/Vision ⁵	\$442.25	586	1	4	\$884.50	586	2	5	\$1,326.75	586	3	6

*For health plan availability by county, please refer to the 2024 Health Benefit Summary or myCalPERS.

¹Dental and Vision coverage is an additional \$38.00 per member per month premium. You will be billed directly for this amount.

²Dental and Vision coverage is an additional \$39.14 per member per month premium. You will be billed directly for this amount.

³Dental benefit is an additional \$15.97 per member per month premium. You will be billed directly for this amount.

⁴Dental benefit is an additional \$12.49 per member per month premium. You will be billed directly for this amount.

⁵Dental and Vision coverage is an additional \$29.54 per member per month premium. You will be billed directly for this amount.

CalPERS 2025 Regional Health Premiums (Actives and Annuitants)

Effective Date: January 1, 2025

Region 2*

Fresno, Imperial, Inyo, Kern, Kings, Madera, Orange, San Diego, San Luis Obispo, Santa Barbara, Tulare, Ventura

Combination Monthly Premiums

Plan	Subscriber in M, & 1 Dependent in B	Plan Code	Party Code	Party Rate	Subscriber in M, & 2+ Dependents in B	Plan Code	Party Code	Party Rate	Subscriber in M, 1 Dependent in M, & 1+ Dependent in B	Plan Code	Party Code	Party Rate
Anthem Blue Cross Select HMO and Medicare Preferred	\$1,406.56	040	4	7	\$1,957.96	040	5	8	\$1,526.52	040	6	9
Anthem Blue Cross Select HMO and Medicare Preferred with Dental/Vision ¹	\$1,406.56	076	4	7	\$1,957.96	076	5	8	\$1,526.52	076	6	9
Anthem Blue Cross Traditional HMO and Medicare Preferred	\$1,598.53	519	4	7	\$2,265.11	519	5	8	\$1,641.70	519	6	9
Anthem Blue Cross Traditional HMO and Medicare Preferred with Dental/Vision ¹	\$1,598.53	522	4	7	\$2,265.11	522	5	8	\$1,641.70	522	6	9
Blue Shield Access+ HMO and Medicare	\$1,396.81	050	4	7	\$1,965.93	050	5	8	\$1,465.68	050	6	9
Blue Shield Access+ HMO and Medicare with Dental/Vision ²	\$1,396.81	090	4	7	\$1,965.93	090	5	8	\$1,465.68	090	6	9
Blue Shield Access+ EPO and Medicare	\$1,396.81	031	4	7	\$1,965.93	031	5	8	\$1,465.68	031	6	9
Blue Shield Access+ EPO and Medicare with Dental/Vision ³	\$1,396.81	032	4	7	\$1,965.93	032	5	8	\$1,465.68	032	6	9
Blue Shield Trio HMO and Medicare	\$1,357.38	095	4	7	\$1,902.84	095	5	8	\$1,442.02	095	6	9
Blue Shield Trio HMO and Medicare with Dental/Vision ⁴	\$1,357.38	098	4	7	\$1,902.84	098	5	8	\$1,442.02	098	6	9
Kaiser Permanente and Senior Advantage	\$1,287.42	540	4	7	\$1,854.02	540	5	8	\$1,252.76	540	6	9
Kaiser Permanente and Senior Advantage with Dental ⁵	\$1,287.42	546	4	7	\$1,854.02	546	5	8	\$1,252.76	546	6	9
Kaiser Permanente and Senior Advantage Summit	\$1,352.65	634	4	7	\$1,919.25	634	5	8	\$1,383.22	634	6	9
Kaiser Permanente and Senior Advantage Summit with Dental ⁵	\$1,352.65	640	4	7	\$1,919.25	640	5	8	\$1,383.22	640	6	9
Peace Officers Research Assoc of CA and Medicare Supplement	\$1,489.00	599	4	7	\$2,021.00	599	5	8	\$1,651.00	599	6	9
PERS Gold and Medicare Supplement	\$1,410.88	655	4	7	\$1,929.73	655	5	8	\$1,611.11	655	6	9
PERS Platinum and Medicare Supplement	\$1,843.46	666	4	7	\$2,598.72	666	5	8	\$1,924.66	666	6	9
Sharp Performance Plus and Direct Advantage HMO	\$1,140.89	025	4	7	\$1,661.96	025	5	8	\$1,065.95	025	6	9
Sharp Performance Plus and Direct Advantage HMO with Dental ⁶	\$1,140.89	027	4	7	\$1,661.96	027	5	8	\$1,065.95	027	6	9
UnitedHealthcare SignatureValue Alliance and Group Medicare Advantage PPO	\$1,332.91	583	4	7	\$1,867.31	583	5	8	\$1,418.90	583	6	9
UnitedHealthcare SignatureValue Alliance and Group Medicare Advantage PPO with Dental/Vision ⁷	\$1,332.91	589	4	7	\$1,867.31	589	5	8	\$1,418.90	589	6	9
UnitedHealthcare SignatureValue Harmony and Group Medicare Advantage PPO	\$1,261.89	773	4	7	\$1,753.67	773	5	8	\$1,376.28	773	6	9
UnitedHealthcare SignatureValue Harmony and Group Medicare Advantage PPO with Dental/Vision ⁷	\$1,261.89	775	4	7	\$1,753.67	775	5	8	\$1,376.28	775	6	9

CalPERS 2025 Regional Health Premiums (Actives and Annuitants)

Effective Date: January 1, 2025

Region 2*

Fresno, Imperial, Inyo, Kern, Kings, Madera, Orange, San Diego, San Luis Obispo, Santa Barbara, Tulare, Ventura

Combination Monthly Premiums (Continued)

Plan	Subscriber in B, & 1 Dependent in M	Plan Code	Party Code	Party Rate	Subscriber in B, & 2+ Dependents in M	Plan Code	Party Code	Party Rate	Subscriber in B, 1 Dependent in M, & 1+ Dependent in B	Plan Code	Party Code	Party Rate
Anthem Blue Cross Select HMO and Medicare Preferred	\$1,406.56	040	7	10	\$1,894.12	040	8	11	\$1,957.96	040	9	12
Anthem Blue Cross Select HMO and Medicare Preferred with Dental/Vision ¹	\$1,406.56	076	7	10	\$1,894.12	076	8	11	\$1,957.96	076	9	12
Anthem Blue Cross Traditional HMO and Medicare Preferred	\$1,598.53	519	7	10	\$2,086.09	519	8	11	\$2,265.11	519	9	12
Anthem Blue Cross Traditional HMO and Medicare Preferred with Dental/Vision ¹	\$1,598.53	522	7	10	\$2,086.09	522	8	11	\$2,265.11	522	9	12
Blue Shield Access+ HMO and Medicare	\$1,396.81	050	7	10	\$1,845.09	050	8	11	\$1,965.93	050	9	12
Blue Shield Access+ HMO and Medicare with Dental/Vision ²	\$1,396.81	090	7	10	\$1,845.09	090	8	11	\$1,965.93	090	9	12
Blue Shield Access+ EPO and Medicare	\$1,396.81	031	7	10	\$1,845.09	031	8	11	\$1,965.93	031	9	12
Blue Shield Access+ EPO and Medicare with Dental/Vision ³	\$1,396.81	032	7	10	\$1,845.09	032	8	11	\$1,965.93	032	9	12
Blue Shield Trio HMO and Medicare	\$1,357.38	095	7	10	\$1,805.66	095	8	11	\$1,902.84	095	9	12
Blue Shield Trio HMO and Medicare with Dental/Vision ⁴	\$1,357.38	098	7	10	\$1,805.66	098	8	11	\$1,902.84	098	9	12
Kaiser Permanente and Senior Advantage	\$1,287.42	540	7	10	\$1,630.50	540	8	11	\$1,854.02	540	9	12
Kaiser Permanente and Senior Advantage with Dental ⁵	\$1,287.42	546	7	10	\$1,630.50	546	8	11	\$1,854.02	546	9	12
Kaiser Permanente and Senior Advantage Summit	\$1,352.65	634	7	10	\$1,760.96	634	8	11	\$1,919.25	634	9	12
Kaiser Permanente and Senior Advantage Summit with Dental ⁵	\$1,352.65	640	7	10	\$1,760.96	640	8	11	\$1,919.25	640	9	12
Peace Officers Research Assoc of CA and Medicare Supplement	\$1,477.00	599	7	10	\$2,093.00	599	8	11	\$2,021.00	599	9	12
PERS Gold and Medicare Supplement	\$1,410.88	655	7	10	\$1,957.01	655	8	11	\$1,929.73	655	9	12
PERS Platinum and Medicare Supplement	\$1,843.46	666	7	10	\$2,428.16	666	8	11	\$2,598.72	666	9	12
Sharp Performance Plus and Direct Advantage HMO	\$1,140.89	025	7	10	\$1,413.33	025	8	11	\$1,661.96	025	9	12
Sharp Performance Plus and Direct Advantage HMO with Dental ⁶	\$1,140.89	027	7	10	\$1,413.33	027	8	11	\$1,661.96	027	9	12
UnitedHealthcare SignatureValue Alliance and Group Medicare Advantage PPO	\$1,332.91	583	7	10	\$1,775.16	583	8	11	\$1,867.31	583	9	12
UnitedHealthcare SignatureValue Alliance and Group Medicare Advantage PPO with Dental/Vision ⁷	\$1,332.91	589	7	10	\$1,775.16	589	8	11	\$1,867.31	589	9	12
UnitedHealthcare SignatureValue Harmony and Group Medicare Advantage PPO	\$1,261.89	773	7	10	\$1,704.14	773	8	11	\$1,753.67	773	9	12
UnitedHealthcare SignatureValue Harmony and Group Medicare Advantage PPO with Dental/Vision ⁷	\$1,261.89	775	7	10	\$1,704.14	775	8	11	\$1,753.67	775	9	12

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²Dental and Vision coverage is an additional \$39.14 per member per month premium. You will be billed directly for this amount.

³Dental and Vision coverage is an additional \$39.14 per member per month premium. You will be billed directly for this amount.

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⁵Dental benefit is an additional \$15.97 per member per month premium. You will be billed directly for this amount.

⁶Dental benefit is an additional \$12.49 per member per month premium. You will be billed directly for this amount.

⁷Dental and Vision coverage is an additional \$29.54 per member per month premium. You will be billed directly for this amount.

Group Proposal Census

Employee Name	Med Tier	Current					Renewal				
		Medical Plan	Family Rate	ER Contrib	EE Contrib	Payroll Deduction	Medical Plan	Family Rate	ER Contrib	EE Contrib	Payroll Deduction
	EE	Kaiser - Gold HMO B	\$380.10	\$304.08	\$76.02	\$76.02	Kaiser - Gold HMO B	\$424.73	\$339.78	\$84.95	\$84.95
	EE	Kaiser - Gold HMO C	\$911.23	\$728.98	\$182.25	\$182.25	Kaiser - Gold HMO C	\$1,019.12	\$815.30	\$203.82	\$203.82
	F	Kaiser - Gold HMO C	\$1,289.24	\$1,031.39	\$257.85	\$257.85	Kaiser - Gold HMO C	\$1,395.96	\$1,116.77	\$279.19	\$279.19
	EE	Kaiser - Gold HMO C	\$390.58	\$312.46	\$78.12	\$78.12	Kaiser - Gold HMO C	\$419.86	\$335.89	\$83.97	\$83.97
	EC	Kaiser - Gold HMO C	\$780.70	\$624.56	\$156.14	\$156.14	Kaiser - Gold HMO C	\$841.86	\$673.49	\$168.37	\$168.37
	EE	Kaiser - Gold HMO C	\$378.86	\$303.09	\$75.77	\$75.77	Kaiser - Gold HMO C	\$418.19	\$334.55	\$83.64	\$83.64
	ES	Kaiser - Gold HMO C	\$945.21	\$756.17	\$189.04	\$189.04	Kaiser - Gold HMO C	\$1,022.05	\$817.64	\$204.41	\$204.41
	EE	Sharp - Performance Gold HMO A	\$625.64	\$500.51	\$125.13	\$125.13	Sharp - Performance Gold HMO A	\$683.70	\$546.96	\$136.74	\$136.74
	EE	Sharp - Performance Gold HMO A	\$512.32	\$409.86	\$102.46	\$102.46	Sharp - Performance Gold HMO A	\$552.78	\$442.22	\$110.56	\$110.56
	EC	Sharp - Performance Gold HMO A	\$778.57	\$622.86	\$155.71	\$155.71	Sharp - Performance Gold HMO A	\$826.49	\$661.19	\$165.30	\$165.30
	EE	Anthem - Prudent Gold PPO E	\$659.29	\$527.43	\$131.86	\$131.86	Anthem - Prudent Gold PPO E	\$730.96	\$584.77	\$146.19	\$146.19
CaliforniaChoice - Kaiser - Gold HMO C						CaliforniaChoice - Kaiser - Gold HMO C					
Contribution:						Contribution:					
Plan Monthly Total:						Plan Monthly Total:					
		\$4,695.82	\$3,756.65	\$939.17			\$5,117.04	\$4,093.64	\$1,023.40		
CaliforniaChoice - Sharp - Performance Gold HMO A						CaliforniaChoice - Sharp - Performance Gold HMO A					
Contribution:						Contribution:					
Plan Monthly Total:						Plan Monthly Total:					
		\$1,916.53	\$1,533.23	\$383.30			\$2,062.97	\$1,650.37	\$412.60		
CaliforniaChoice - Kaiser - Gold HMO B						CaliforniaChoice - Kaiser - Gold HMO B					
Contribution:						Contribution:					
Plan Monthly Total:						Plan Monthly Total:					
		\$380.10	\$304.08	\$76.02			\$424.73	\$339.78	\$84.95		
CaliforniaChoice - Anthem - Prudent Gold PPO E						CaliforniaChoice - Anthem - Prudent Gold PPO E					
Contribution:						Contribution:					
Plan Monthly Total:						Plan Monthly Total:					
		\$659.29	\$527.43	\$131.86			\$730.96	\$584.77	\$146.19		
Group Monthly Total:						Group Monthly Total:					
		\$7,651.74	\$6,121.39				\$8,335.70	\$6,668.56			
Group Annual Total:						Group Annual Total:					
		\$91,820.88	\$73,456.68				\$100,028.40	\$80,022.72			

PAUMA VALLEY COMMUNITY SERVICES DISTRICT

As-Needed Engineering Services

Project No.: 202346
Date: October 17, 2024
Prepared By: Justin O'Brien, Cassidy Thornbury
Reviewed By: Andrew Frost, PE
Subject: Lift Station Assessments

This document is released for the purpose of information exchange review and planning only under the authority of Andrew J. Frost, October 17, 2024, California C-77724.

1.0 BACKGROUND

1.1 Overview

Pauma Valley Community Services District (District) was created in 1961 to provide for the collection, treatment, and disposal of locally generated wastewater. In 1996, the District expanded its reach to provide security and latent power to the area, however its main focus is on wastewater collection and disposal.

The District maintains and operates a sewer collection system including over 18,000 linear feet of pipeline, 144 manholes, three lift stations, and over 400 service connections. The majority of the system flows via gravity to the wastewater treatment facility (Facility or WWTP) located near the District office. The three lift stations (Oak Tree, District, and WWTP) in the system are also located close to the Facility, with the main lift station (WWTP) located onsite and lifting sewage to the Facility. An overview of the sewer collection system is presented in Figure 1.

During rain events, the District's collection system experiences spikes in flows due to inflow and infiltration (I&I). This is a common issue for sewer systems and can lead to increased stress on the collection system during rain events. During these events, lift stations can often become a critical step in the proper operation of the collection system.

The District currently has concerns over future development (estimated within 2 years) of approximately 40-60 single-family residences within the District's northern service area (Oak Tree). For this assessment, flow projections for this development were estimated using a per capita wastewater generation factor. Assuming 2.2 people per unit with a wastewater generation factor per unit of 168 gallons per capital per day (gpcd), the additional flow to the District's collection system would be approximately 22,176 gallons per day (gpd).

1.2 Purpose

The purpose of this memo is to highlight current issues and provide both potential solutions to the problems as well as next steps.

These current issues are summarized below:

- Treatment - Currently the collection system sees flows peaking at 96,000 gpd. The operational capacity of the Facility with one train in service is 87,500 gpd. Flows in exceedance of the one train design treatment capacity will need to be operational assessed (outside the scope of this task) and addressed for long term performance assurance.
- Storage – During rain events, it may be necessary for the collection system to store additional flow beyond the capacity of the Facility. This will most likely be done in concert with the WWTP Lift Station (WWTPLS) and the Facility as described in Section 3.
- Flows - Over the long term, the collection and treatment system will require improvements and upgrades to maintain current operations, as well as provide capacity for additional flows that are expected to be added to the system.

1.3 Current Treatment Facility and Lift Stations

The Facility is located at 33129 Cole Grade Road in Pauma Valley, California, within the Pauma Hydrologic Sub-Area of the larger San Luis Rey Hydrologic Unit, directly adjacent to the San Luis Rey River. The Facility's wastewater treatment system consists of an Aero-Mod Sequox package treatment plant operating with two parallel domestic wastewater treatment trains. The Aero-Mod Sequox process is designed as a low maintenance, nutrient removal activated sludge system with clarifiers, and aerobic digesters for sludge handling. The three lift stations convey the influent flow from the collection systems and the administration office to the Facility. There is no preliminary or primary treatment at the Facility. The discharge from the Facility is land applied on-site to one of four percolation ponds. Currently, a contract operator serves as Chief Plant Operator (CPO) and daily operations of the Facility are shared by the contract operator and District staff.

The Facility has a design maximum flow of 175,000 gallons per day (gpd), or 87,500 gpd with one train in service which is the current daily plant operation. Based on flow data provided by the District from August 1, 2023 through September 3, 2024, the average effluent flow from the Facility was approximately 46,000 gpd with a minimum flow of 17,850 gpd and maximum flow of 96,000 gpd. This flow data is summarized in Table 1. The effluent flow exceeded the design capacity of a single train in service on two occasions during this period: 96,000 gpd on December 21, 2023, and 93,100 gpd on February 4, 2024, as shown in Figure 2. To note regarding the line chart in Figure 2 is the change in variability of the flow data from before and after December 2023. This is the time period when the District decided to hire a new contract operator versus using District staff for operations. The daily effluent flow meter is totalized and read and logged by the operator at 7 am 5 days a week. Before the December 2023 the totalizer was read and the value written as is without resetting the totalizer to 0 at 7 am. The day before would be subtracted from the day of to get the flow for the previous 24 hrs. The new contract operator who changed practice from December 2023 on would reset the totalizer every 7 am to 0.

Table 1 Effluent Flow Data Summarized from August 1, 2023 - September 3, 2024

Statistical Parameter	Plant Effluent Flow (gpd)	Associated Date
Minimum	17,850	12/22/23
Maximum	96,000	12/21/23
Average	46,107	N/A

Notes:

gpd - gallons per day

1. Maximum and Minimum flow numbers in the received dataset were questionable outliers during a heavy rain event on 12/21/23 and the following day. Flows of these magnitudes should be QA/QCed.



Figure 1 Sewer System Overview



Totalized Effluent Flow Data from August 1, 2023 - September 3, 2024

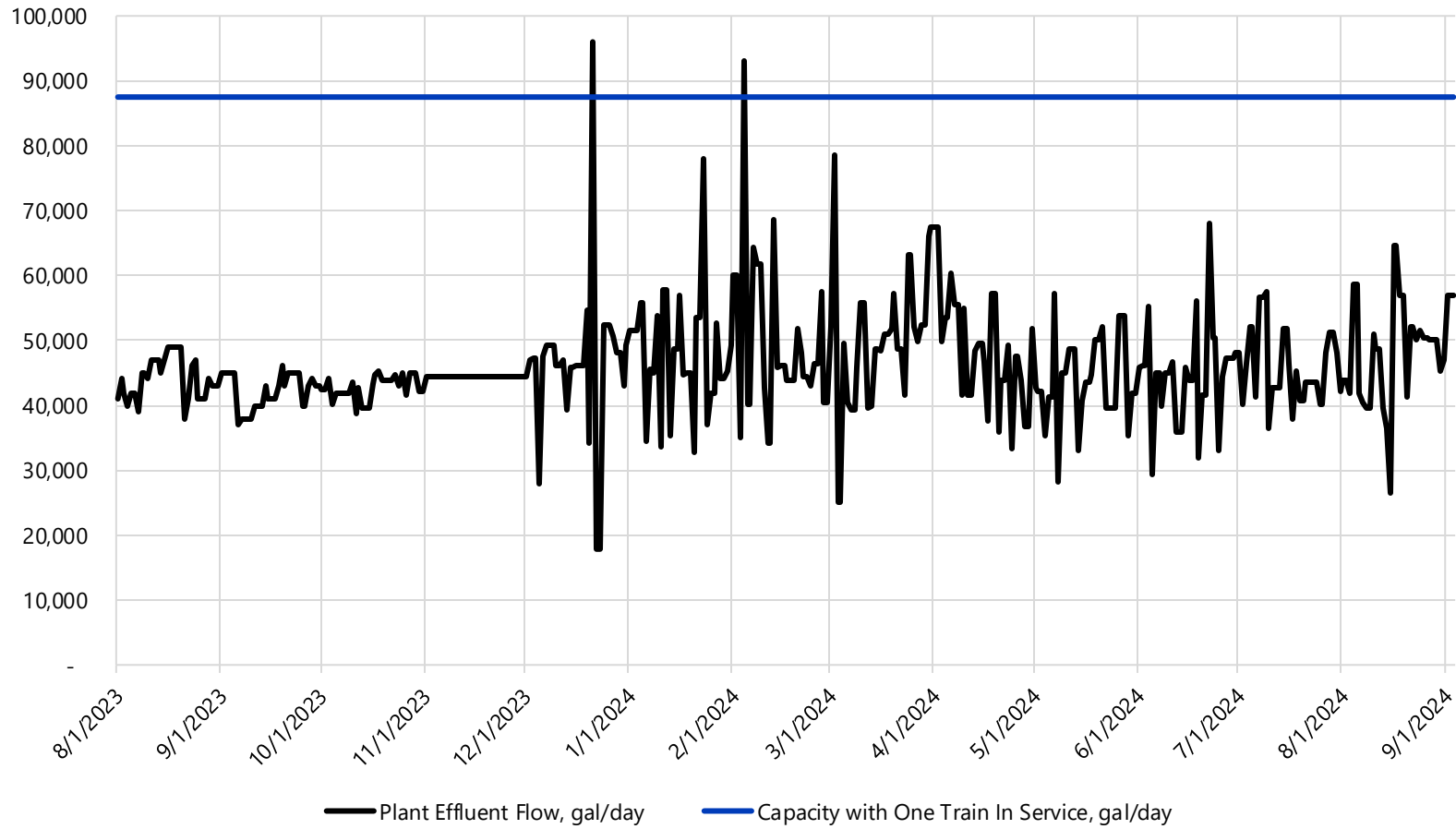


Figure 2 Totalized Flow Data from August 1, 2023 through September 3, 2024



2.0 CURRENT CONDITIONS

2.1 Oak Tree Lift Station

The Oak Tree Lift Station (OTLS) is located on the northwestern portion of the District’s service area, along Spring Valley Road, as shown in Figure 1. This lift station currently accepts flow from Pauma Elementary School, as well as the Oak Tree development surrounding Mill Creek Road.

The OTLS is a minor lift station with a wet well structure including electrical and communication equipment covered by a small canopy and shield structure. The entire perimeter of the OTLS is enclosed by chain-link fence with razor wire along the top. Security is provided by a lockable gate that serves as the only entrance. There is a small onsite davit structure that can be used to raise and lower the pumps. An overview of the OTLS is shown in Figure 3.

The wet well is roughly 48-inches in diameter with two submersible pumps. Each pump is a Goulds 1GD51G1CD Dual Seal Grinder 2 horsepower (hp) pump, capable of pumping 45 gallons per minute (gpm). The pumps are not integrated with a variable frequency drive (VFD) and will operate at max output when triggered to run. The station currently works on a draw-fill operation, using float levels to control the pumps turning on and off. The OTLS discharges into a 2.5-inch force main that travels to the east and outlets directly into the wet well of the WWTP Lift Station (WWTPLS). A summary of the OTLS characteristics is provided below in Table 2.

Table 2 Oak Tree Lift Station Characteristics

Wet Well Dia. (ft)	Wet Well Depth (ft)	Wet Well Vol. (ft ³ / gal)	No. of Pumps	Maximum Flow per Pump (gpm) ⁽¹⁾
4	17	855 / 6,272	2	45

Notes:

Dia. - diameter; ft – feet; Vol. – volume; ft³ – cubic feet; gal – gallons; No. – number; gpm – gallons per minute

(1) The total lift station maximum capacity is 90 gpm with two pumps running.



Figure 3 Oak Tree Lift Station

2.1.1 Oak Tree Lift Station Operations

Based on info received from the District, the OTLS operates in lead/lag sequence after the chopper pump has run for 30 minutes. At 6 feet the lead pump is triggered to run, and 1.5 feet the pump(s) stop. Under this control strategy the OTLS has been able to meet the flow demands of the system and has not experienced operational issues within the past year.

2.1.2 Oak Tree Lift Station Condition

The OTLS is in varying condition, depending on the relative components of the station. A field walk was performed on September 10, 2024, with Carollo and the District, to visually inspect the condition of the OTLS. The electrical equipment and canopy structure appear to be relatively new and in good condition as shown in Figure 4. The OTLS does not have a stationary on-site generator, however, there is a connection for a portable generator to be utilized in the event of a power outage. The wet well structure and pump equipment appeared to be in worse condition. There is noticeable corrosion on the cover of the lift station, as well as exposed aggregate visible near the top of the wet well structure which can be seen in Figure 5.



Figure 4 Oak Tree Lift Station Electrical Equipment



Figure 5 Oak Tree Lift Station Wet Well and Cover Condition

2.2 WWTP Lift Station

The WWTPLS is located east of the District's main administration building, adjacent to and on the same site as the Facility, as shown in Figure 1. This lift station currently accepts flow from the entire District service area and serves as the main lift to begin treatment at the Facility.

The WWTPLS is the District's largest and most critical lift station; continuous uninterrupted operation is critical to the District's wastewater system. The WWTPLS consists of a wet well structure with metal hatch located in the middle of a drive aisle adjacent to the Facility. The associated electrical and communication equipment for the lift station is on free-standing struts located immediately south of the station outside of the vehicle traveled areas. The electrical and communication equipment is connected to the wet well via shallow conduit channels within the drive aisle. There is a small onsite davit structure that can be used to support raising and lowering the pumps. Security for the WWTPLS is provided in the same manner as the Facility; both within a locked and controlled entrance to the east of the Administration building. The secured area is shared with a private airfield. Figure 6 shows a wide angle view of the WWTPLS.

The wet well is roughly 84-inch in diameter with two submersible pumps. Each pump is a Flygt 3102 with approximately 5 hp, capable of pumping 300 gpm. The station currently works on a draw-fill lead/lag sequence, using float levels to control the pumps turning on and off. The WWTPLS discharges into a 6-inch force main that conveys flow to the influent of the Facility. The characteristics of the WWTPLS are presented in Table 3.

Table 3 Wastewater Treatment Plant Lift Station Characteristics

Wet Well Dia. (ft)	Wet Well Depth (ft)	Wet Well Vol. (ft ³ /gal)	No. of Pumps	Maximum Flow per Pump (gpm) ⁽¹⁾
7	17	2,617 / 19,208	2	300

Notes:

Dia. - diameter; ft – feet; Vol. – volume; ft³ – cubic feet; No. – number; gpm – gallons per minute

(1) The total lift station maximum capacity is 600 gpm.

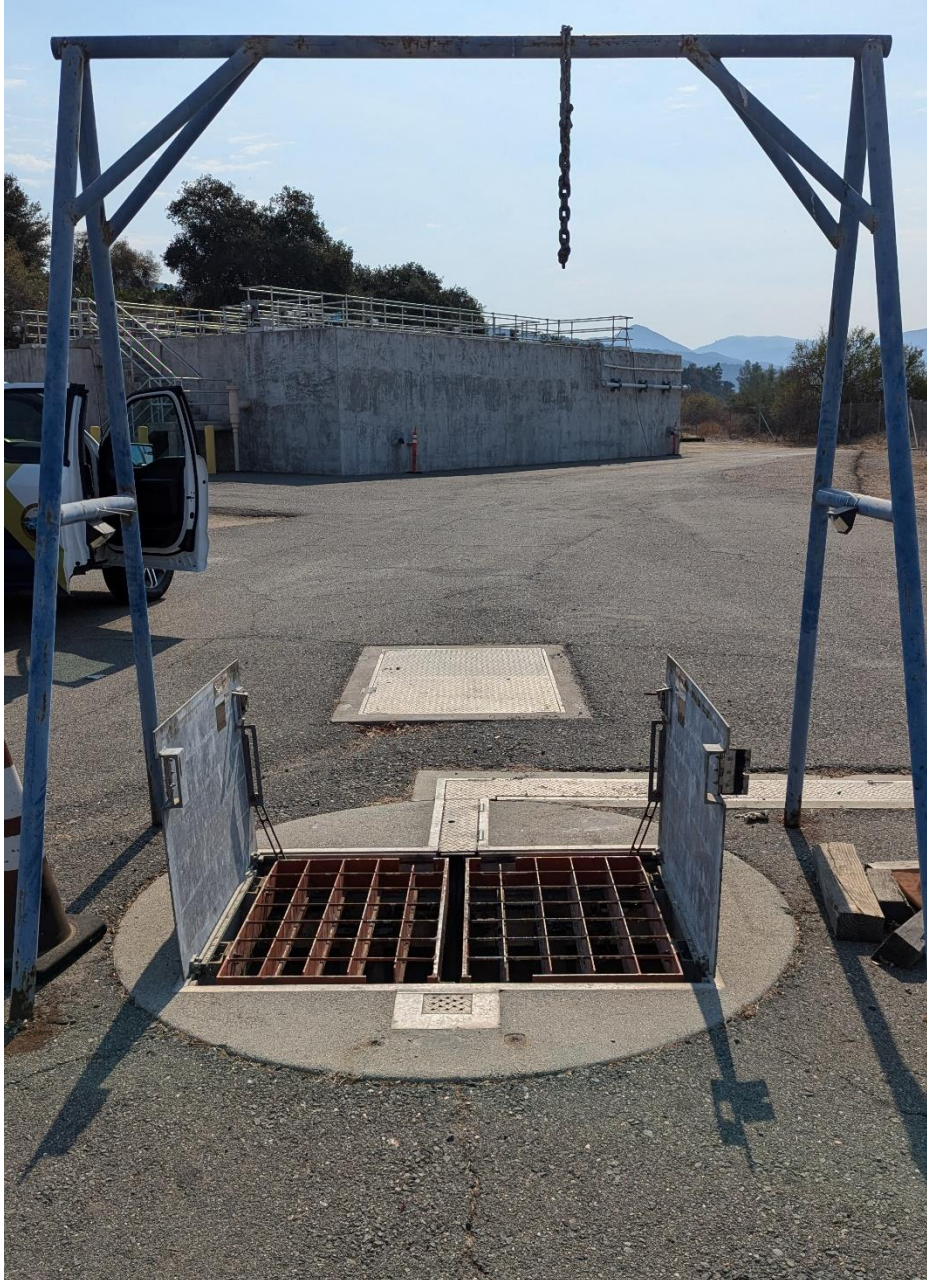


Figure 6 Wastewater Treatment Plant Lift Station - Overview

2.2.1 Wastewater Treatment Plant Lift Station Operations

Based on info received from the District, the WWTPLS operates by alternating the main lead pump between the two pumps, with float levels set to 3.76 feet for pump on and 1.5 feet for pump off. Under this operation, the OTLS has been able to meet the flow demands of the system and has not seen hydraulic or treatment issues in the past year.

2.2.2 Wastewater Treatment Plant Lift Station Condition

The WWTPLS appears to be in overall good working condition based on a field walk performed on September 10, 2024, with Carollo and the District. During the visual inspection, the electrical equipment did not show any signs of visible wear and appeared to be in good condition. There is an on-site generator for the WWTPLS which has an automatic transfer switch (ATS) to provide backup power to the lift station in the event of a power outage. The same backup generator also provides power to the Facility during an outage.

The wet well structure and pump equipment appeared to be in good working condition, however, the water level in the wet well did not allow for a visual inspection of the pumps during the time of the site visit. The lid and hatch over to the wet well appeared to be in good condition and functioned without issue.

3.0 POTENTIAL SOLUTIONS

3.1 Treatment

Potential solutions to address the issue regarding flows are outlined in Section 3.1.1 and 3.1.2 below.

3.1.1 Additional Train at the Facility

The main difficulty with the AeroMod system is operational inflexibility. Currently, only one train within the Facility is online and in service. This restricts the design capacity to 50% of the total design, limiting the flow to 87,500 gpd instead of 175,000 gpd. One potential solution to this problem is to bring the additional train online and into operation. This would provide additional treatment capacity needed for peak flows and allow for one train to be taken offline for maintenance during lower flow periods. However, switching from one train during current normal flows to two trains in service in preparation for a storm cannot be done in one day but might take a several to a week due to seeding of the bacteria to the additional train. In addition, this strategy would not deal with the restriction of the maximum capacity of the pumps at 600 gpm.

3.1.2 Upgrade the Facility

An alternative potential solution to provide additional treatment capacity at the Facility is to construct an entirely new treatment facility. However, this potential solution is not recommended as it would come at a high cost to the overall system and likely yield only minor improvements to overall effluent quality.

3.2 Storage

Potential solutions to address the storage issue are outlined in Section 3.2.1 and 3.2.2 below.

3.2.1 Equalization Tank via Overflow at the WWTP Lift Station

One option to address the potential increased flows to the WWTPLS is to construct an overflow that would utilize the old clarifier as emergency storage, potentially as much as 50,000 gallons. Under this option, a gravity pipe would be constructed from the existing WWTPLS wet well that would convey flows

above a certain level to the emergency storage area. These flows would then be pumped back to the wet well for treatment and disposal over a manageable period, once the increased flows in the collection system have subsided.

3.3 Flows

The potential solutions to the flow management issue are outlined in Section 3.3.1 and 3.3.2 below.

3.3.1 Replace Pumps at the Oak Tree Lift Station

To provide additional capacity for the expected new flows to the OTLS from expected new home construction, it may be necessary to replace the existing pumps within the OTLS. These improvements would need to be carefully considered to verify correct pump sizing. The projected flow estimates at this stage are preliminary, based only on generic factors for the including the number of homes, anticipated population per household, and expected flow per person. In addition to the pump replacements, other improvements such as relining may be required at the lift station due to the condition of the station.

3.3.2 Replace One Flygt Pump at the WWTP Lift Station

Currently, both Flygt pumps within the WWTPLS are the same size. A potential solution to address the increased flows during rain events is to remove one pump and replace it with a larger pump. This would leave one of the existing pumps to handle the 'normal' flows and a second larger pump to work either in a lead/lag sequence or either pump put into manual to provide additional capacity during rain events. In addition, although a more expensive option, would be to add VFDs to these pumps, an influent flow meter, and upgrade the PLCs to establish flow control for the Facility. This would allow for a more immediate response to rain events and increased flows.

4.0 NEXT STEPS

4.1 Recommendations

It is recommended that the District adopt a four-phase approach to improving the collection and treatment system.

- Phase 1 – The District should prepare an update to their Overflow Emergency Response Plan before the next audit date with the method of procedure that will govern the operation of the collection system in a high flow event, outlining the plan for managing the level in the WWTPLS which appears to be the critical point in the system to avoid a sanitary sewer overflow (SSO).

In the event that both pumps are running and the level in the WWTPLS is continuing to rise, the District should utilize a separate mobile pump to move flow from the wet well to the influent of the treatment train. This will serve as additional capacity and should prevent a SSO at the WWTPLS based on the historical flow data analyzed.

- Phase 2 – To govern the long-term operation and management of the collection system it is recommended for the District to complete a sewer master plan document that will analyze the collection system, provide recommendations on sizing and future expected flows, and outline recommended projects to the system to maintain operations and plan for growth.

- Phase 3 - The District should begin to budget for additional data gathering and condition assessments of the collection system including the pipelines, manholes, and lift stations. The results of the condition assessment will provide data on condition based required projects as well as valuable data on the elevation and operation of the collection system. Such data can provide hotspot locations and identify critical points in the collection system that should be closely monitored. These would be ideal locations for smart meters or similar technology that can remotely monitor levels within the system and limit the need to visit the system during normal operations and high flow events.
- Phase 4 – After the additional 40-60 homes are built and contributing wastewater to the collection system, the District should consider running continuously with two trains in service. This will prevent the bottleneck in the system from being the treatment process itself.

ATTACHMENT A **PUMP OPERATION AND MAINTENANCE
MANUALS**

PAUMA VALLEY COMMUNITY SERVICES DISTRICT

BOARD OF DIRECTORS

Item: 13.A

Date: November 25th, 2024

From: General Manager, Eric Steinlicht

Issue: General Manager’s Report: Prioritization Schedule

PRIORITIZATION SCHEDULE

Below is a table illustrating the General Manager’s current priorities categorized by criticality as it singularly relates to the Pauma Valley Community Services District (PVCSD). Prioritization items are to be added, eliminated, or amended at the discretion of the Board of Directors.

HIGH-PRIORITY ITEMS

ITEM	STATUS
Maintain Daily District Operations/Execute & Maintain Policy Adherence and Assist Board Members as Needed	Ongoing
Update and Renew Reporting Data as the LRO (Legally Responsible Official)	Ongoing
Conduct many conference calls pertaining to the community misinformation, organizational restructuring, legal issues, storm drains and overall projects	Ongoing
Respond to Board Requests for reports and additional information	Ongoing
Meet with all Board members to gather direction and goals quarterly	Ongoing
Acquire Certified Special District Manager Certification	Ongoing (3 Year Requirement)
Update Job Descriptions as Needed	Ongoing
Complete Board of Directors Performance Goals for the year	In Progress
Evaluate the snake removal service, investigate, bring correct PPE and training to District to protect staff, limit liability and ensure the District continues to receive this service compliantly	Completed
Work with consultants at recreating financial tools and build a more precise budget with new goals and projects, including making PVCSD a more competitive place to work	In Progress
Prop 218 Rate Study/Gates/Patrol (Cost of Service Study)	In Progress
Execute Strategic Planning Session	In Progress (Paused until New Board)
Salary Survey and Total Compensation Study	In Progress (Partially Completed)
Update Employee Review Sheets	In Progress
Solar Project Completion (Extensive)	In Progress (SDG&E Inspection)
Investigate And Implement Criteria for Restricting RFID/Gate Access When Major Threat Exists	In Progress
Review/Establish Emergency Contracted Assistance (WW Operators/Engineers/WW Collection System Operators)	In Progress
Update PVCSD Employment Application	In Progress
Develop Criteria for Justification of Additional Utility Worker	In Progress (Two for On Call Rotation)
Ascertain Whether or Not PVCSD Is Providing Services to Residents Outside of The Sphere of Influence	In Progress (Confirmed – work w/ legal)

Cost of Service Analysis – Approved	In Progress
Acquire Collection System Maintenance Grade III, WWT Grade III,	In Progress
D1 Figure out an internet solution for the Solar Pannels for ongoing monitoring, follow up on SDG&E inspection, schedule ribbon cutting ceremony for Solar Project	In Progress
Complete legal review of Master Service Agreement, once more, of VC3 for IT support	In Progress
Acquire Low Interest Loan/Line of Credit to Replenish Reserves and Working Capital for District Needs	In Progress
Develop Service Request System for Residents	Completed
Acquire Essential Leadership Skills Certification	Completed
Acquire Board Approval for NBS to Collect Fees Via Tax Roll	Completed
Attend CSDA GM Leadership Conference	Completed
Acquire Quote and execute repair on storm drain hazard	Completed
District Newsletter	Completed
Acquire Quote and execute repair for sewer lateral off Wiskon Way West (Future hazard)	Completed
Develop Critical Failure Contact Binder	Completed
Develop Criteria for Justification of Full Time Employee	Completed
Create Long Term Financial Plan & Update Reserve Policy	Completed
Review Positions and Contract Operational Costs for Comparison	Completed
Investigate a Third Option for Solar Project Completion	Completed
Investigate Large Storm Drain System and Quantify the System and Needs	Completed
Draft Request for Proposal for the Wiskon Way West Storm Drain System for the Correct Management of System	Completed
Publish Request for Proposal for Wiskon Way West and Present to Board	Completed
Identify Legal and Financial Implications of Restructuring for PVCSD and RPMWC	Completed
Employee Handbook Update (Remove Job Descriptions)	Completed
Work with general counsel and surveyor to determine District obligation for Tom Cerruti’s storm drain, and dig through substantial historical records to comprehend the system	Completed
Acquire new Utility vehicle	Completed
Provide solar contractors the annual electrical use via SDG&E in order to procure a proposal in addition to multiple field tours with multiple contractors	Completed
Respond to Public Records request regarding Security, dig through District archives and work with attorney, then meet with attorney to prevent issues with rate increases to maintain District service without a continued trajectory towards District bankruptcy	Completed
Chat with Maria Kennedy and discuss the viability of grants or a District loan for the WWTP and SCADA – meet with President to discuss options with Maria	Completed
Work with accountant consultants to understand and impact CalPERS fixes	Completed

Research CA code regarding auditors	Completed
Work with legal and surveyor to understand district obligations for Storm Drains and legality	Completed
Work with Roadway to showcase District ability for their mandate, draft reports with legal and CPA	Completed
Reach out to the DIR to ensure compliance with the prevailing wage	Completed
Meet with attorney to discuss several time sensitive items in January of 2024	Completed
Train new utility worker, give tour, explain duties, and create substantial documentation for this role	Completed
Develop Critical Failure Response Plan	Completed
Identify and facilitate GIS transition immediately with deadline approaching due to Dudek potential contract breach	Completed
Develop Professional Services Agreement For Carollo and addendum for GIS/Solar so time sensitive work can begin	Completed
Identify new IT team ASAP	Completed
Renew Grade II Cert	Completed
Identify On-Call Engineering Firm	Completed
Identify Contract Wastewater Treatment Operations, Acquire Proposals, Have Objective View on Operations	Completed
Develop New Budget with Justification	Completed
Reach Out to Firm Who Can Potentially Provide a Loan	Completed
Create New Sampling and Analysis Form Due to Oversight and Report to SWRCB to Show Transparency that Incorrect Sampling Method has Ended and Form Updated	Completed
Attend Event for Adan Ortega and Advocate for RPMWC, Network with Professionals to Assist RPMWC	Completed
Identify New Vendor for Wastewater Collections and Rehab Needs	Completed
Conduct Employee Reviews of Management	Completed
Incorporate Cross Training of Admin Staff	Completed
Move Venue for Board Meetings to The Country Club: Robert Trent Jones Room Indefinitely	Completed
Develop/Locate Financial Data to Supply to Board Members Fully Burdened Rates	Completed
Require New Employees to Drug Screen/Background Check, Figure Out Logistics for This to Occur	Completed
Create 23/24 Fiscal Year Budget	Completed
Become Board Representative for SGMA JPA	Completed
Reformat PVCSD Agenda & Board Letters/Reports	Completed
Create Calendar System for Admin, & All Other Divisions (Shifts/Deadlines/Overtime Tracking Etc.)	Completed
Realign Staff with Certain District Policy	Completed
Review Policy & Ask Legal as It Relates to RFID Access	Completed
Update 22/23 PVCSD Budget To Accurately Reflect Allocations (Overdrawn in Power/Legal Etc.) (Delegate Office Manager to Illustrate the Loss)	Completed
List Priorities for Board	Completed
Create Employee Assistance Program (EAP)	Completed
Ascertain Where PVCSD Board Meetings Take Place (Schedule out for year)	Completed

Identify SGMA JPA As It Relates to PVCSD (Consult Literature/Lawyer/Staff)	Completed
Add "Reportable Action" To Agenda Post Closed Session	Completed
Acquire Gas Detector for Utility & Calibration Equipment/Calibration Assistance (Major Safety Item)	Completed
Automate Separation of Expenses for PVCSD And Rancho Pauma Mutual Water Company	Withdrawn
Post Open Position for New Utility Worker, Interview, Communicate, Verify Who Pays for Position	Withdrawn/Completed
Prepare for Mid Budget Review	Withdrawn

MID-PRIORITY ITEMS

ITEM	STATUS
Expand Professional Network for the Benefit (Shared Resources) of the District (Local Municipal GM's)	Ongoing
Public Outreach – Meet Residents	Ongoing
Complete General Manager Certification as It Relates to Wastewater and Water Distribution/Treatment	Completed and Ongoing
Attend CWEA Board meetings and be an active member, network and bring the District value	Ongoing
Complete General Manager Certification, Training Events, & Grant Writing Training	Ongoing
Call BB&K to discuss SGMA and gather intel	In Progress and Completed
Begin the process of finding out whether the WWTP has operational functionality on the other half of the train, due to improper care taking	In Progress
Research cost to outsource all areas of operations	In Progress
Issue objective for WW Worker to acquire new anti-bolt cut locks	In Progress
Create day to day job tasks and functions for Utility Worker	In Progress
Research zoning and LAFCO approval within the District for rendering of services	In Progress
Investigate 15 Property's Sewer Connection Purchase (find paperwork, speak with buyer, find out condition of main)	In Progress
Investigate easement at 32979 Temet, if an Easement was obtained, or not	In Progress
Create a new Storm Drain Maintenance task list	In Progress
Implement CMMS To Capture Inventory and Ensure We Have Spare Parts Program Implemented for Pumps/SCADA/Misc. and Provide Work Order System for Utility so that All Tasks are Accounted for	In Progress
Ascertain how to Efficiently Back-up Former Employees Emails for Public Records Request Rather than Maintaining Pricey Subscription	In Progress
New Radio's for Patrol/Gates, Meeting w/ Mike Esparza and Security/Gates Supervisor	In Progress (Next fiscal year)
Create Injury and Illness Prevention Plan	In Progress
Major Website Revamp with Transparency/Compliance Updates (Extensive if Done in House/Costly if Outsourced)	Completed
Allow PVCSD Residents to Pay Bills Via Website or Link/or Use NBS Tax Roll Collection	In Progress

New Law Requires Update for SSMP (Step Process) - Read and Review SSMP (Become Familiar) Update as Needed	In Progress
Meet With Current Contractors Providing Essential Services and Contractors Who Can Provide the Same Service for Less or Provide Additional Value to the District	In Progress
Collect All CSD Resident's Emails	In Progress
Update PVCSD Policy's W/ Legal (BB&K Or New Firm)	In Progress
Procure Grants For PVCSD	In Progress
Discuss With Board Building Depreciation and Electrical Lighting Issues	In Progress
Weigh Options for Selling Tesla's to Get Trucks with Lights to Put Patrol in Compliance	Paused
Create critical redundancy at WW lift Stations, in the event of total pump failure	Paused (Scheduled)
Investigate and hire a surveyor to ensure the Storm Drain Ownership and District responsibility	Completed
Research Storm Drain legal issues	Completed
Investigate Potential for New Accounting Firm	Completed
Find a new viable option for water service due to RPMWC false allegations	Completed
Find New Gate System Preventative Maintenance and Repair Company	Completed
Refund or Ascertain Next Step with Oak Tree Purchaser for New Homes (Paid for Sewer Connections in Advance, or so told)	Completed
Discuss with Edie Bailly new Auditing Firm and address concerns	Completed
Discuss W/ Board Cost of Living Adjustment to All Staff	Completed
Community Outreach, Introduce New Gm (Letter)	Completed
Research and investigate the cost to Offer PVCSD services to the PVRA	Completed
Call Bart Dixon for historical information and procure new quote for maintaining the Storm Drain at the 8 th Fairway (In addition to SD Storm Water Solutions)	Completed
Revisit uniform policy for Security and apply a compensation for old uniforms	Completed
Create new organizational chart for Board review	Completed
Analyze Need for CHP Satellite Office and PVCSD Needs	Completed
Review Legislative Updates for PVCSD Board Members by Investigating Online, and Speaking with Lawyer and Staff	Completed
Review AED BMP's and county guidelines, develop and submit plan	Completed
Quantify Data to Understand Costs as it Relates to Certain Activities/Tasks at Board Request	Completed
Speak With Scott Shinner Country Club GM about Communication When Utilizing PVCSD Utility Crew	Completed
Require Drug Screening and Background Check	Completed
Renew CWEA Grade II Collections Certification	Completed
Discuss W/ Legal, and Resident the Possibility for Oak Tree to Pull Out of PVCSD Patrol (Not Possible Without Board Approval, Special Tax)	Completed

Add Ab 557 As Action Item to CSD Agenda and Research with Board Letter (Understand Law and Legislation)	Completed
Communicate with Resident Needing to Temporarily Close Road for Crane Access to Property (Communicate with Roadway, Residents, staff)	Completed
Meet With All Board Members Individually	Completed
Investigate Need for PVCSD To Remain in SGMA JPA	Completed
Assist With Junk in The Trunk Garage Sale Event	Completed
Discuss W/ Board & General Counsel Tasers for Security Patrol	Withdrawn

LOW-PRIORITY ITEMS

ITEM	STATUS
Maintain Office files and PC item organization	Ongoing
Register for LAIF Access	In Progress
Verify with general counsel if gender neutral bathrooms are required by law	In Progress
Third Opti Follow up with Office Manager regarding Steve Hennes and ensuring the sewer permit is filed for RV discharge	In Progress
Contact King Benefits Regarding Form Needed on File, and if Legal Needs to Be Consulted	In Progress
Develop Policy with Board Regarding Access to Sewer System Access Points for Critical Needs, And Right of Access (Easement)	In Progress
Identify and Potentially Create a Policy for Public Records Request	In Progress
Provide Treatment Plant Tour to The PVCSD Board	Paused
Look Into Welding/CWEA/Training Classes for Utility to Upkeep Certification	Paused
Meet With Van Of El Rey Regarding New Laws for Maintaining Grease Interceptor	Paused
Meet with Former Board Members: Dick Nolan & Bill Winn	Paused
Research financial capitalization over \$5,000	Completed
Fix Phone System Issues, and Upgrade System	Completed
Review proposal for collection system maintenance	Completed
Network with neighboring agencies for potential resource sharing	Completed
Read Through Most Recent Compliance Inspections	Completed
Investigate Best Solution for Weed Abatement for PVCSD Easements/Assets/Access	Completed
Instruct Security Supervisor to research reports for an HOA area of community for prior security reports for any trends of issues	Completed
Update Patrol staff and supervisor new flashlights have been acquired	Completed
Work with Resident Who'd Like Manhole in Backyard to Blend in with Grass (Ordered and Installed AstroTurf to Manhole)	Completed

Create Letter for Parking Permit, Discuss with Residents the Policy, (Ongoing, Residents Have Issue w/ Policy)	Completed
Investigate the new law for water conservation for resident wanting to know the rules for an HOA (Sukat Trail HOA President)	Completed
Meet With Tom Tran, Scada Technician for Training on The Software, and Request New Proposal Exclusively for PVCSD	Completed
Approve New Building Permit Post Fees and Permit Completion	Completed
Research and Review Potential for PVCSD Office Being a UPS Drop Off Point	Completed
Participate In Multiple Webinars (Brown Act, Finance, Grant Writing Etc.)	Completed
Draft And Finalize New Sewer Service Permit Application	Completed
Ron Krohn Request to Have the Helipad Be Certified Via Caltrans as A Medivac Helipad, Send Letter to Confirm that is its Sole Use	Completed
Draft Letter to Provide Gate Attendant Pay Raise/New Hire/Reinforce District Policy	Completed
Draft Letters for New Hires/Promotions	Completed
Meet With CPA/Nigro & Nigro to Address Financial Situation Of PVCSD	Completed
Investigate Current Rent for Hangars Due from Country Club To PVCSD/Deal for Road Use for Treatment Plant	Completed
Relay Board Election Forms (LAFCO/Roadway/RPMWC)	Completed
Acquire Approval from RPMWC President For Including PVCSD Staff on Insurance for Vehicles in The Event of Emergencies	Completed
Sign Up for Alerts for Regulatory Bodies/Resources for GM/Special Districts	Completed
Check In with Aerosurf Internet for Slowness of Internet Speed at Guard Shack	Completed
Install SCADA Connectivity on Phone and GM Laptop	Completed
Create Grease Interceptor Inspection Form	Completed
Discuss With President Barry Willis LAFCO Incumbent on Next Board Meeting as Agenda Item	Completed
Alter Financial Reports to Expenses/Revenues	Completed
Learn More About Dudek and Reach Out for Potential Tour	Completed & Withdrawn
Review Current Percentage Split Costs For PVCSD/RPMWC Assets/Employees and How Organizational Relationship Works	Withdrawn

Prepared by: General Manager, Eric Steinlicht
Reviewed by: Office Manager, Marissa Fehling
Approved by: General Manager, Eric Steinlicht