



SRSRA NEWSLETTER

For SRS Retiree Association Members

Gene Dixon, Editor

Volume 29, No. 1 January 2026

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SRSRA Contact Information:

SRS Retiree Association, Inc. P. O. Box 5686, Aiken, SC 29804 Phone Message Line: 803-226-0070
e-mail: SRSRA@srsretirees.org or use the “Contact Us” button on the website.



Web Page: <http://srsretirees.org>



Like us on Facebook: SRS Retirees

Membership Status

Our 2025 membership total was 2,095. That’s 4.8% greater than last year. We have members from 27 states and 218 cities. 91.7% of the members live in Georgia or South Carolina with 55.7% living in Aiken County.

2026 annual dues are from January 1 through December 31 and can be paid anytime. Membership is available to anyone retired under the previous WSRC – BSRI retirement plan or the successor plan, currently called the SRNS, LLC Multiple Employer Pension Plan. This includes retirees from WSRC, BSRI, WSMS, BNFL, URS, SRNS, SRR, SRMC and BSRA. Retiree membership is \$25 and Surviving Spouse \$5. All members’ spouses (SRS retiree or not) can join for free.

The easiest way to pay dues is online. Go to our website – srsretirees.org – there is a Membership button near the bottom of the page. It lets you complete an electronic form and go to our PayPal account to make a payment via any credit card. There is a paper copy form there you can complete and mail a check to us, if that is your preferred method.

2026 SRSRA Annual Meeting

Make plans now, the 2026 SRSRA Annual Meeting will be held April 21,2026. The location will change to the Millbrook Baptist Church “Kid City”. The new location reflects a significant savings in annual meeting costs. The preliminary agenda is as follows:

SRSRA 2026 Annual Meeting Agenda

- Call to Order
- SRSRA Update
- Treasurer’s Report
- SRSRA Resource Center Update

- SRSRA Responses to Submitted Questions
- General Business
- Door Prizes
- Adjournment

Gas Card Winner

The first gas card winner for this issue is Susan Lowe This SRSRA member has won a \$50 gas card courtesy of the SRSEA and SRSRA. Please text or call Bob Hottel (803 221 4248) or email (roberthottel27@yahoo.com) within 30 days to claim your gas card! Please verify your home address when you contact Bob.



Benefit Plan Highlights from the IRS

Excerpts from Form 5500, Annual Return/Report of Employee Benefit Plan,
Plan Name: The Savannah River Nuclear Solutions LLD Multiple Employer Pension Plan
Filing Date: October 15, 2025 for reporting year 2024.
15689 Active participants as of the end of the plan year
3,898,503,707 benefit fund market value
5.08% effective interest rate
106.27 Adjusted funding target attainment percentage
Plan assets held as:
Public Equity, 17.0%
Investment-Grade Debt and interest Rate Hedging Assets, 66.0%
High-yield Debt, 4.0%
Real Assets, 6.0E%
Cash or Cash Equivalents, 3.0%
Other, 4.0%
Participating Employer, percentage of total contributions for the plan year
Savannah River Nuclear Solutions, LLC, 58.78%
Savannah River Mission Completion, LLC, 23.11%
Battelle Savannah River Alliance, LLC, 18.11%

Retiree HRA Medical Claims Contractor CHANGE.

Recently changes to the HRA Medical Claims Contractor were announced by the SRNS and BSRA through letters sent to most retirees. The letters are attached for reference. Please note the schedule for information sessions in the third level and register to attend by copying the links into your web browser. You can call SRNS Benefits to register for a specific meeting time at 803-725-7772 if you are not able to use the register on line feature for the in-person sessions.

The SRSRA Retiree Resource Center has been providing feedback to all entities involved leading up to this change in the form of recommendations on making the HRA reimbursement process as convenient, and easy for retirees as possible. Your SRSRA Retiree Resource Center will prepare to provide retiree assistance, as necessary, to aid retirees transitioning from HealthEquity/EZ Receipts (formerly WageWorks) to the HRA contractor's methods and procedures as more information and details become available. Stay Tuned!

Please, Help Us Help Legislators Focus on Retirees

The SRSRA Board continues to work for a pension increase through lobbying contractors, DoE and legislators. What the Board has learned is that to represent you, legislators need to hear from you. How do you get them to hear from you? You have to reach out to them. So, try this:

1. Draft (each) message in a way that you focus on a specific request for action. You'll have up to 10,000 words to make your point. The SRSRA Board suggests focusing on a pension adjustment.
 - a. Let them know that you know they are busy and thank them for their considering your request.
 - b. State your purpose briefly and clearly. You might point out the need for the Congress to provide a cost-of-living adjustment to your pension to combat rising inflation over the last 20 years.
 - c. Personalize your message with stories of how the increase will affect you, your family or community. Some points you can reference—but make them personal—include:
 - SRS retirees have not received a pension adjustment in 25 years, a 77% loss in spending power.
 - Ask that if the government truly values your services during the cold war a pension adjustment would reflect that value.
 - Approving SRS retirees an adjustment would provide equity with retirees from across the weapons complex who have been received adjustments over the last 25 years.
 - d. Be polite and respectful by maintaining a courteous tone.
 - e. Ask for a response that shows their commitment to a pension adjustment.
 - f. Avoid stale jargons such as "...as a citizen and taxpayer". Do make the point that you are asking "...for their support in including a cost-of-living adjustment in the biennium budget.
 - g. Focus on key points. Try to use common terms and language.
 - h. Close your draft by encouraging specific action(s) in the form of a request. Offer to speak with the legislator by repeating your phone number.
2. When you have finished your draft, find your legislator at <https://www.congress.gov/members/find-your-member>. Enter your zip or street address and you will see a map and a list of legislators.
3. Click on contact and answer the questions. Your draft request for action should be copied or transcribed into the box labeled "Please write your message"

Give it a try. The SRSRA Board has, and will, keep asking for pension adjustments. Won't you help by personally contacting your representative(s)?

Aging into Training

Do you know someone who is retiring? Let them know to sign-up for Aging Into Medicare training through the SRSRA website: <https://srsretirees.org/resource-center-aim-scheduler-r0/>.

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In Memoriam: April – June 2025

SRSRA Board members obtain these names from local newspapers. If you would like your deceased loved one included, please send us their name via our website, email at SRSRA@srsretirees.org or leave a message at (803)508-7065.



Earl DeLeon "Andy" Anderson	Williston	Tony M Love	N. Augusta
Gary Bell	Barnwell	Linda Hart Lucas	Aiken
Dena Bowers	Hampton	Stanley F Massingill	Graniteville
Harold Richard Brant	Olar	William Caldwell "Bill" Mack	N. Augusta
Thomas Levi Burton Jr	N. Augusta	Linda Boynton Moss	Aiken
Evelyn Virginia McDaniel Clark	Jackson	Dr. Richard Mueller	Aiken
Edward Rudolph Cornwell	Johnston	Ira Benjamin "Ben" New	Aiken
Mark Ellis Collins	N. Augusta	Patrick Thomas Nichols	Evans
Ricky Cox	Aiken	James Roy Pounds	Augusta
Rev. Elizabeth Johnson Curry	N. Augusta	Teressa Hutto Proveaux	Orangeburg
Ted Shirley DeHart	N. Augusta	David Everette Sanders	Barnwell
George Deily	Aiken	Johnny Lee Sanders	Allendale
Billy Dixon	Warrenville	Robert Kirby Scott	Evans
James Roger "Jim" Fuqua	Greenwood	Gary Hugh Street	N. Augusta
Vernon Franklin "Pete" Grady	Williston	Dale Stephens	Aiken
Alphis Grubbs	Barnwell	Robert Wendell Stow Jr	Aiken
Otis Michael "Mike" Harrison	Varnville	Craig Stripling	N. Augusta
Karen Wallace Henderson	Beech Island	Charles Davis Tillman	N. Augusta
Rose Mary Still Ingram	Bluffton	George Allen Westbrook	Hephzibah
Dr. William Samuel James "Sam" Kelly	Aiken	Joe Wallace Williams	Barnwell
Phillip Gerald "Phil" Linebarger	Augusta	Mary Jo Wilson-Spencer	Aiken

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December 15, 2025

Transition and Blackout Notice New Service Provider for Your Health Reimbursement Arrangement (HRA)

Good news! Administration of your HRA will be moving from HealthEquity/WageWorks to **Gallagher HealthInvest** in **February 2026**. This transition will result in a new customer care center and administrative platform to better serve you. Please read this notice carefully. It contains important details about what you should expect and steps you will need to take in the New Year.

As a reminder, your HRA is sponsored by Battelle Savannah River Alliance, LLC (BSRA). BSRA puts tax-free money into your HRA. You can continue using this money to help cover your out-of-pocket healthcare expenses and premiums during retirement.

Why the change? The move to **Gallagher HealthInvest** will provide you with better online services and customer care when you have questions or need help. Other important enhancements and services include:

- User-friendly **online portal**
- Fully-functional **mobile app**, HRAgo®
- Personalized **telephone service** and **secure messaging**
- Easy **online or mobile claims** submission
- Fast **claims processing** in five to seven business days
- Automatic **premium reimbursement** option

However, during the transition period, your account and HRA services will be unavailable for a period of time known as a Blackout Period, as described below.

Transition and Blackout Period from January 17 February 9, 2026

Carefully read each item below, including information on what you need to do.

1. **Reason for Notice Transition to HealthInvest:** The administration of your account is changing from HealthEquity/WageWorks to HealthInvest in February of 2026. You are not required to take any action right now. Your HRA benefit from BSRA is not changing. This transition is expected to wrap up on or around **February 10, 2026**. HealthInvest will work with our current providers to make this experience as smooth as possible.
2. **HRA Rights Affected by the Transition and the Blackout Period:** Any claims received by HealthEquity after **January 16, 2026 will not be processed**. You will **need to resubmit these claims** to HealthInvest after receiving your welcome packet in late February. Your original claims eligibility date will transfer to HealthInvest for qualified expenses all the way back to when your HRA first became claims eligible.

3. **Length of Blackout Period:** Your HRA will be temporarily unavailable during the period beginning **Saturday, January 17, 2026, through Monday, February 9, 2026**. Claims and premium processing are scheduled to resume February 10.
4. **Contact for Assistance and Questions.** If you have any questions about the transition or the Blackout Period please contact **Gallagher at 1-855-662-0681**, 9:00 a.m. to 7:00 p.m. Eastern time, Monday through Friday.

Upcoming Information to Assist in the Transition

- **Welcome Packet:** Watch for a Gallagher HealthInvest welcome packet in the mail soon after the transition and blackout period in **late February**. It will include your personalized new account number, transferred account balance, and easy instructions for registering and accessing your account online. HealthInvest's customer care phone number also will be provided in case you have questions or need help.
- **Note:** *If your email address is on file*, HealthInvest also will send you a heads-up **enrollment confirmation email in early February**. It will contain instructions and a time-sensitive online registration link so you can log in and check out your new account prior to the actual transition. *If you do not have an email address on file*, watch for your **Welcome Packet** as it also contains needed information.

Transitioning Reimbursements for Premiums and Claims

- **Automatic Premium Reimbursements (APRs)** will be transferred automatically to HealthInvest, on or around **February 10**.
- If you currently utilize **Pay Me Back** through HealthEquity, you will need to initiate a similar process under HealthInvest after registering and logging in to your new account on or after **February 10**.
- **Direct Deposit** banking information will not automatically transfer. **You will need to set it up again** under HealthInvest. Your welcome packet will provide instructions.

Online Account Access: Look for online registration instructions in your welcome email and welcome packet. Online registration helps protect your account from unauthorized access.

Mobile App: After registering online, search and download **HRAgo®** from the App Store or Google Play. With HRAgo®, you can easily connect to your HRA from any mobile device. You'll even be able to submit supporting documentation and claims with just a few clicks.

Questions: As noted, contact **Gallagher at 1-855-662-0681**, 9:00 a.m. to 7:00 p.m. Eastern time, Monday through Friday.



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SRNS Retirees and/or eligible Spouses:

SRNS is committed to continually evaluating our benefit programs to ensure they remain competitive, efficient, and aligned with the needs of our workforce. As part of this ongoing effort, we are transitioning our Health Reimbursement Account (HRA) administration from HealthEquity to Gallagher HealthInvest, effective on or around February 10, 2026.

This change allows us to enhance the overall HRA experience by streamlining administration, improving service delivery, and expanding access to tools and resources that support retirees in managing their healthcare expenses more effectively. Gallagher HealthInvest brings a strong focus to participant support, intuitive technology, and responsive customer service, helping to ensure a smooth and seamless experience.

Importantly, this transition does not change the HRA benefit stipend nor require participants to change Medicare supplement or Part D prescription drug plans.

The following FAQ, enclosed, Summary Plan Description (SPD), and Transition Letter provide additional details about the plan, what this transition means for you, key dates to be aware of, and the steps—if any—you may need to take.

Q1: Am I going to lose the HRA annual stipend that has been provided? No! Savannah River Nuclear Solutions supports the annual stipend to help cover "Eligible Medical Expenses," which may include medical, dental, vision care expenses and premiums for such coverage, incurred by you or your eligible spouse that satisfy all the conditions for "medical care" as defined in Internal Revenue Code (IRC) Section 213(d) and related guidance. You must initially enroll in a Medicare supplement plan through Gallagher and maintain coverage for the initial year to be eligible for the HRA stipend.

Q2. Can I continue with my current Medicare supplement coverage or am I required to change plans? You can keep your current Medicare supplement plan and are not required to make a change. The same is true if you are currently enrolled in a Part D prescription drug plan - no change is required.

Q3: Why is Savannah River Nuclear Solutions making this change? Many of our retirees have spoken loudly about an improved customer service experience when enrolling in a supplemental plan and/or speaking to someone about issues they're having. We heard from you and are making this change because we want our retirees to feel like their concerns are being addressed. Additionally, Gallagher HealthInvest has a proven track record of outstanding service since 1984. Their Customer Care Center has earned Benchmark -Portal's **Center of Excellence** certification every year since 2015, one of the most prestigious awards in the customer service industry.

Q4: Who is Gallagher HealthInvest? Gallagher, or Gallagher Benefits Services (GBS), is the company that we utilize to enroll our eligible retirees, age 65 and older, into various supplemental plans to qualify for the annual stipend. Currently, our retirees must interact with both Health Equity and Gallagher. Effective February 10th, 2026, retirees will have all their information in one central location - Gallagher for plan enrollment and **Gallagher HealthInvest** for HRA claims processing. This is a win-win for all eligible retirees and SRNS. SRNS retirees will be able to contact **Gallagher** at **1-855-662-0681**.

Q5: One of the issues I had in the past was the claims processing timeframe, will that continue? Claim processing should improve with HealthInvest; however, we ask that our retirees be mindful that it



is a best practice to submit claims for submission at least 10 days prior to the due date of the premium to their provider.

Q6: Can I change my current supplemental plan to another provider? If you have satisfied the one-year requirement, you can always speak with an advocate at Gallagher to discuss your options for changing providers.

Q7: Will the annual stipend change with the new claims processing? No, annual stipend amounts are based on age group and will currently remain the same until you age into a new age group.

	Tier 1	Tier 2	Tier 3	Tier 4
Age Band	65-69	70-74	75-79	80+
Amount	\$2,508	\$2,804	\$3000	\$3,444

Q8: Will I need to complete a new direct deposit form with HealthInvest. Yes! A direct deposit form will be included in the Welcome Packet and will contain instructions. You can also enter your direct deposit information in the Gallagher HealthInvest online portal.

Q9: How can I get reimbursed?

- Two methods of reimbursement are available, and additional information will be included in the Welcome packet coming from Gallagher HealthInvest. Here are the two methods:
 - **Automatic Premium Reimbursement (APR).** HealthInvest can automatically reimburse your monthly retiree insurance premiums. After the transition, complete the APR Form or log in at HealthInvestHRA.com and click **Claims**. Then click the **Set up an Automatic Premium Reimbursement** button and follow the instructions.
 - If you are already enrolled with an APR through Gallagher now, no action is required
 - If you want more information about this payment method, please call
 - **Pay Me Back (Claim).** After the transition, when you're ready to file a claim, complete the Claim Form or log in at HealthInvestHRA.com and click **Claims**. You can also submit claims with **HRAgo**, the Gallagher HealthInvest mobile app. Gallagher HealthInvest will process your claim in about five to seven business days.
 - Review the HRA Summary Plan Description for details.
- What has changed?
 - Pay My Provider is no longer a reimbursement option.

Q 10: When will the Summary Plan Description be made available for review? Enclosed along with this letter is the Transition Letter from **Gallagher HealthInvest**, and the Health Reimbursement Account (HRA) Summary Plan Description (SPD) for your review. Please address any questions to **Gallagher** at **1-855-662-0681**. **Please consult the Summary Plan Description for further information about legal rights and responsibilities under the HRA Plan and the ability of SRNS to modify the HRA Plan.**



Gallagher representatives will host both in-person meetings, and webinars in both January and February to provide details about the transition and answer questions. The following schedule includes dates, times, and locations. You can register for the sessions at the website listed below:

January HRA Class Registration Website: <https://SRNS-HRA.eventbrite.com>

January location and class dates:

Aiken Senior Life Services
1310 East Pine Log Rd
Aiken, SC 29803

In-person presentation about the transition:

1/13 - 9:00a-10:30a

1/13 - 12:00p-1:30p

1/13 - 3:00p-4:30p

1/14 - 9:00a-10:30a

1/14 - 12:00p-1:30p

1/14 - 3:00p-4:30p

1/15 - **Webinar Registration** <https://msteams.link/7APQ> presentation- 9:00a-10:30a

February HRA Class Registration Website: <https://SRNS-HRA-FEB.eventbrite.com>

February location and class dates:

Savannah River Ecology Lab UGA-(SREL) Conference Center
3280 Williston Rd,
Aiken, SC 29803

In-person presentation AFTER the transition:

2/17 - 9:00a-10:30a

2/17 - 12:00p-1:30p

2/17 - 3:00p-4:30p

2/18 - 9:00a-10:30a

2/18 - 12:00p-1:30p

2/18 - 3:00p-4:30p

2/19 - **Webinar Registration** <https://msteams.link/FE5W> presentation- 9:00a-10:30a

(During the February visit, staff will be onsite to assist retirees and retiree dependents with setting up their accounts, resolving issues retirees are having logging into the new platform, etc.)