

# Today's Topics



Review Critical Concepts & Pages



Benefits Eligibility Triggers



Resources



Best Practices and Q&A





The Benefits Eligibility Process runs nightly and analyzes a variety of data fields in UCPath to determine the following:

- Health & Welfare Benefit Package: Full, Mid, Core,
   Post Doc or No Benefit Package
- Dependent Care Flexible Spending Account Eligibility for Graduate Student Researchers (GSR) and Academic Student Employee (ASE)
- Defined Contribution Plan Safe Harbor (DCPSH)
- UC Retirement Program (UCRP) Eligibility and Tiers
- Summer Salary Benefit (SSB–403(b) Plan)

**Note:** There are no manual overrides in UCPath to provide someone benefits

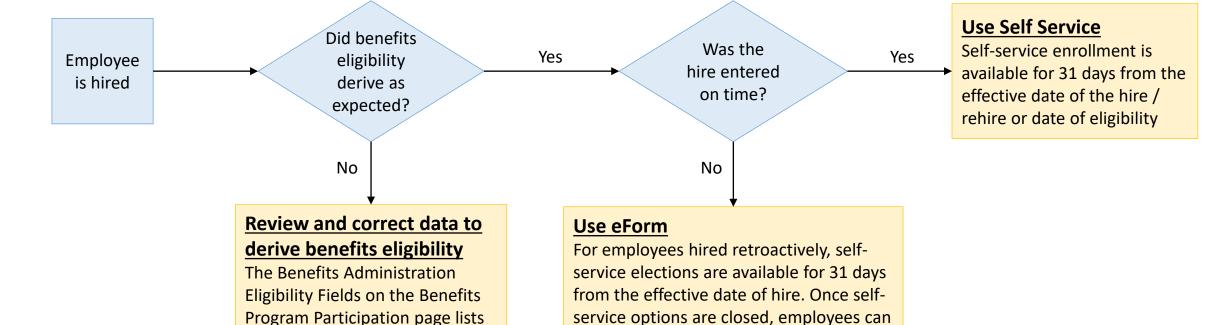


the Benefits Programs employee

is eligible for. <u>Job Aid: Benefits</u> Administration (Ben Admin)

**Eligibility Configuration Fields** 





make benefit elections by submitting a benefits enrollment eForm available in

the Forms Library (within 31 days of the

date created / date of entry)

# Period of Initial Enrollment (PIE)



 Benefit self-service enrollment is available for 31 days from the effective date of the hire / rehire or date of eligibility

Employees
hired after a
break in
service of 120
days or more
are
considered
newly eligible

Employees hired after a break in service of less than 120 days are restricted to previous benefit elections unless the rehire is in a new calendar (plan) year

Employee **must submit** a Health Benefit Enrollment form

For employees hired retroactively, self-service elections are available for 31 days from the date of hire

Once self-service options are closed, employees can make benefit elections by submitting a manual enrollment form and submitting a case to UCPath (within 31 days of the date created / date of entry)

Refer to the Late Enrollment Request Form for additional opportunities to enroll

- After 31 days, unelected options display as "Waived" on the Benefits Summary page
- When an employee becomes eligible for benefits benefit eligibility notifications are sent notifying employees to use UCPath to make their selection
- Employees have 90 days to make retirement elections (in Fidelity) the 90-day period begins the date the transaction is entered UCSanI

## Benefits Administration Process in UCPath



Events are processed in the sequence they have been entered

When changes are made to any of the key fields, the Benefit Administration Process evaluates and automatically updates benefit eligibility

 Example: A change in Union Code from CX to TX automatically modifies the Benefit Program the employee is eligible for, including deduction amount and frequency Benefit Programs
determine benefit
elections available
for employees,
benefit premium
rates and
frequency of
deductions

There are typically no systematic notifications when benefits terminate except when the employee is eligible for COBRA

 COBRA packages are only sent when the primary job is terminated and there are no other active positions Employees are automatically enrolled in UC paid plans such as basic life, basic disability, summer salary, and retirement tier plans when they are eligible

# Job Data | Benefit Program Participation



Benefits Administration Eligibility Fields are populated automatically after the system evaluates all of the employee data fields that trigger benefits eligibility as well as information from the UC Retirement System (UCRS)

Elig Fld 1: Health & Disability Benefits

Elig Fld 2: Welfare Benefits

Elig Fld 3: Medicare

Elig Fld 4: DCP Summer Salary

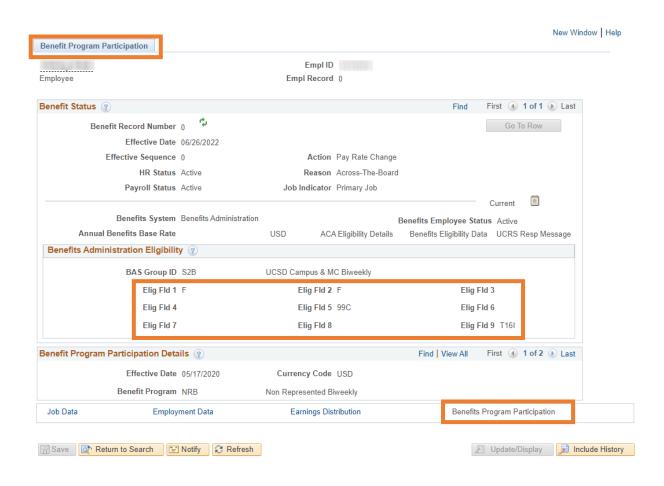
Elig Fld 5: Covered / Uncovered

Elig Fld 6: Health & Welfare Grandfathered

Elig Fld 7: Faculty

Elig Fld 8: Rehired Retiree

Elig Fld 9: Retirement Plan Eligibility



Additional details about these fields are in the Job Aid: Benefits Administration (Ben Admin) Eligibility Configuration Fields

Health and Welfare requirements for benefit eligibility are outlined in the <u>Group Insurance Regulations – Administrative</u>

<u>Supplements to Part II-A</u>

<u>UC San Diego</u>

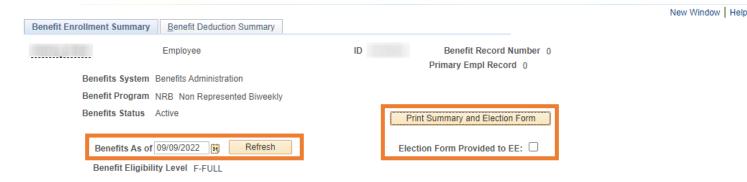
# **Benefits Summary Page**



### Navigation: Benefits > Review Employee Benefits > Benefits Summary

This page shows past, current, and future dated benefit enrollments. View elections by using the Benefits As of Date field and select Refresh

If you have an employee going on an unpaid leave or short work break eligible for direct billing, Print Summary and Election Form to provide the employee



**Current Enrollments** 

Plan Type	Coverage Election	Benefit Plan	Description	Coverage or Participation	Coverage Begin	Employee Monthly Cost	Total Monthly Cost
Medical	Elect	HBG	BLUE GOLD	Family (NA+NC)	01/01/2020	266.39	2464.60
Dental	Elect	DPPO	DENT PPO	Family (NA+NC)	01/01/2020		126.87
Vision	Elect	VSP	VSP	Family (NA+NC)	01/01/2020		10.76
Legal Insurance	Waive			Waived	01/01/2022		
Behavioral Health	Waive			Waived	05/17/2020		
Life	Elect	BLIF	Basic Life	Salary	11/04/2019		4.34
Supplemental Life	Elect	SL4X	SUPLIFE 4X	Salary X 4	11/04/2019	6.03	6.03
Employee & Dependent AD&D	Elect	ADDF	AD&D FAMIL	\$500000	11/04/2019	8.50	8.50
Basic Dependent Life	Waive			Waived	05/17/2020		
Exp Dependent Life - Spouse/DP	Elect	EDLS04	SpoLIF2.0X	Salary X 2	01/01/2020	4.89	4.89
Exp Dependent Life - Child	Elect	EDLC01	ChidLIF10K	\$10000	01/01/2020	0.31	0.31
Basic Disability	Elect	BASDIS	BasicDsbty	55% of Salary	01/01/2020		8.04
Voluntary Long-Term	Elect	VLTD02	LNGDSBLTY2	60% of Salary	01/01/2020	11.27	11.27



# Benefits Eligibility | Key Fields



- Effective Date
- Action/Reason Codes
- Job Indicator
- Position Number
- Location
- Expected Job End Date
- End Job Automatically Checkbox
- HR Status
- Payroll Status
- Empl Class

- FTE (Full Time Equivalent)
- Pay Group
- FICA Status
- Salary Admin Plan
- Job Code
- Union Code
- Employee Relations Code
- Representation Code
- Birth Date
- Social Security Number (SSN)

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# Job Data | Work Location Tab



#### **Effective Date**

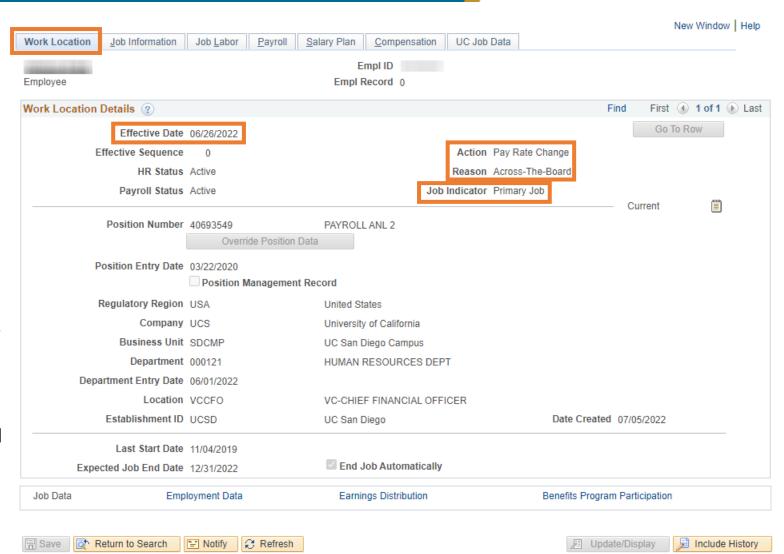
Identifies the beginning of benefits eligibility

### **Action/Reason Codes**

Refer to the <u>Action/Reason Codes Impacting</u>
 <u>Benefits</u> job aid to view the Action/Reasons and their impacts to benefits

#### Job Indicator

- Identifies the employee's Primary Job
- Job fields FTE and Duration are added together for Primary and Secondary Jobs to determine the benefit program the employee is eligible for (Refer to the <u>Group Insurance Regulations</u> – <u>Administrative Supplements to Part II-A</u> for FTE and Duration requirements)
- Certain jobs are not eligible for benefits; therefore, FTE and Duration do not contribute to benefits eligibility: Contingent Workers, Without Salary (WOS), Short Work Break



Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation | UC Job Data

# Job Data | Work Location Tab (continued)



#### **Position Number**

 The position number determines the Job Code and the corresponding Union Code (viewable under the Job Labor tab)

#### Location

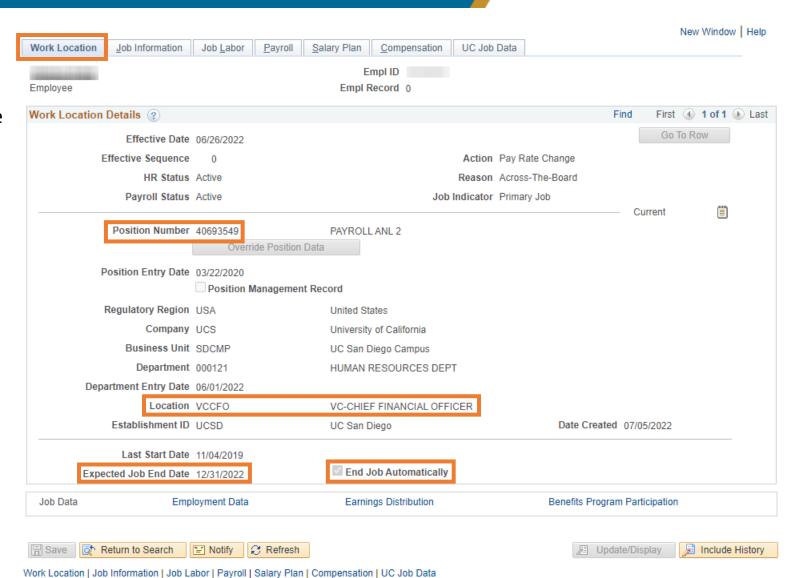
 Both location zip code and home address zip code impact the HMO benefit plans available

### **Expected Job End Date**

- Job End Date impacts Duration which impacts eligibility
- Benefits will not automatically terminate on / after the Expected Job End Date has passed.

### **End Job Automatically Checkbox**

 If selected, the employee's job automatically terminates as of the Expected Job End Date



# Job Data | Job Information Tab



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#### **HR Status**

Inactive jobs are not eligible for benefits

### **Payroll Status**

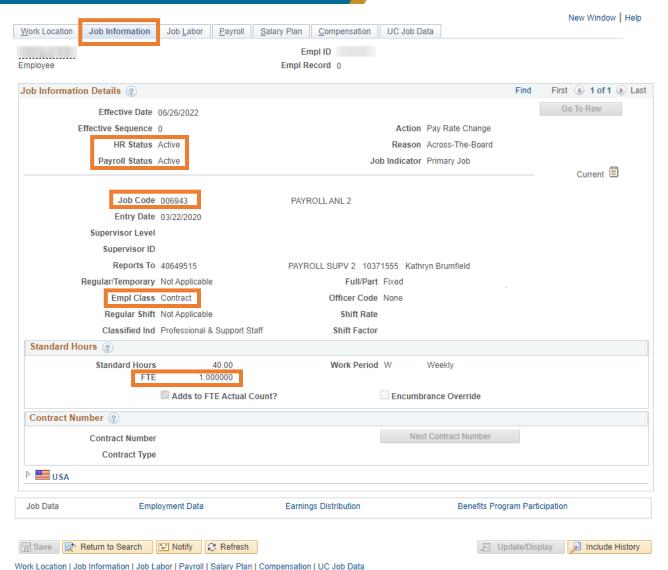
- Only some Status' are evaluated for benefit eligibility:
  - Leave with Pay (P) evaluated for benefit eligibility
  - Unpaid Leave of Absence (L) enrolled in benefit billing
  - Short Work Break (W) not evaluated for benefits eligibility. May be enrolled in benefit billing. Refer to the <u>Short Work Break Matrix</u> for additional details
  - Deceased (D) not evaluated for benefit eligibility
  - Retired (R) not evaluated for benefit eligibility
  - Terminated (T) not evaluated for benefit eligibility
  - Terminated with Pay (U) not evaluated for benefit eligibility

### **Empl Class**

 Empl class is entered by the location when hiring. Staff Empl class selected at the time of hire for Academics is derived by job code.

### **FTE (Full Time Equivalent)**

- FTE of 1.0 equals 40 hours
- FTE determines initial benefits eligibility. Once the employee meets initial eligibility – ongoing eligibility is based on the annual Standard Measurement Period (SMP) process



# Job Data | Payroll Tab

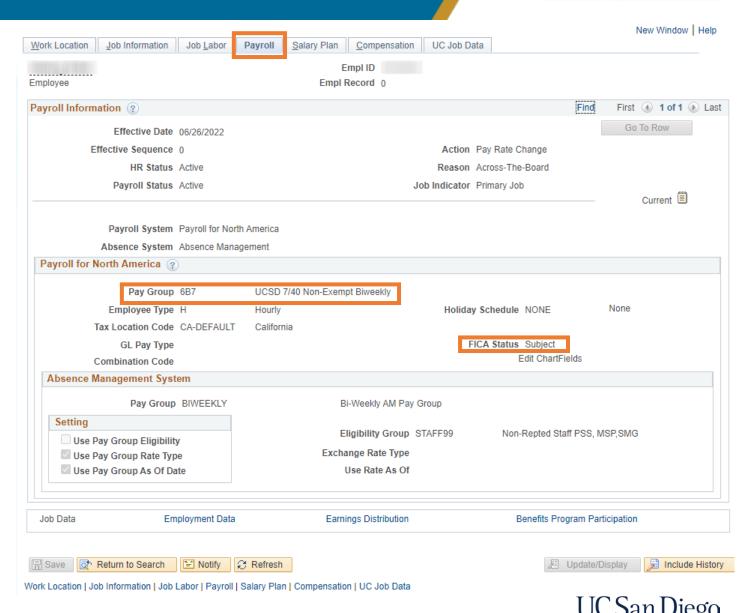


### **Pay Group**

- Some pay groups determine the benefit program the employee is eligible for:
  - Post Doc Fellows
  - Post Doc Pay Directs
  - Students

#### FICA Status

- FICA status has an impact on the eligibility of Safe
   Harbor and the Retirement Tier Plan assigned to
   the employee and is analyzed when the system
   populates the Benefit Eligibility Configuration Fields
   below:
  - Subject Required to pay Social Security and Medicare Tax (default for non-student employees)
  - Medicare Only Required to pay Medicare tax but not Social Security
  - Exempt Not required to pay Social Security or Medicare tax (default for student employees; except summer session)

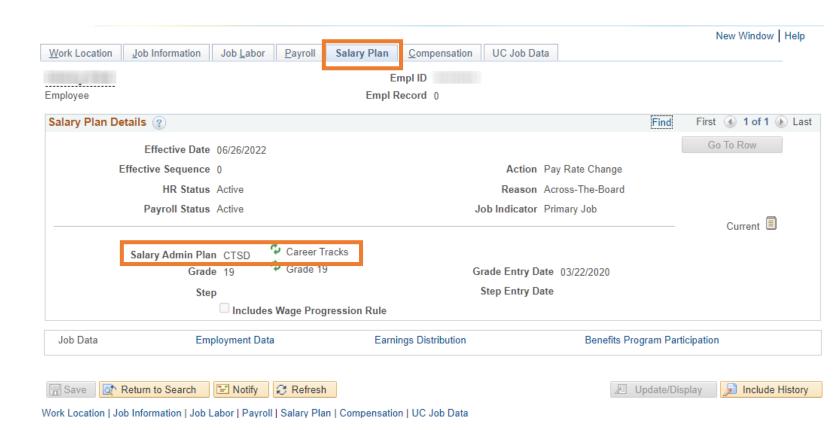


# Job Data | Salary Plan Tab



### **Salary Admin Plan**

- Defaults from Position Number
- Without Salary Plans (WOS) are not eligible for benefits



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# Position Data | Description Tab

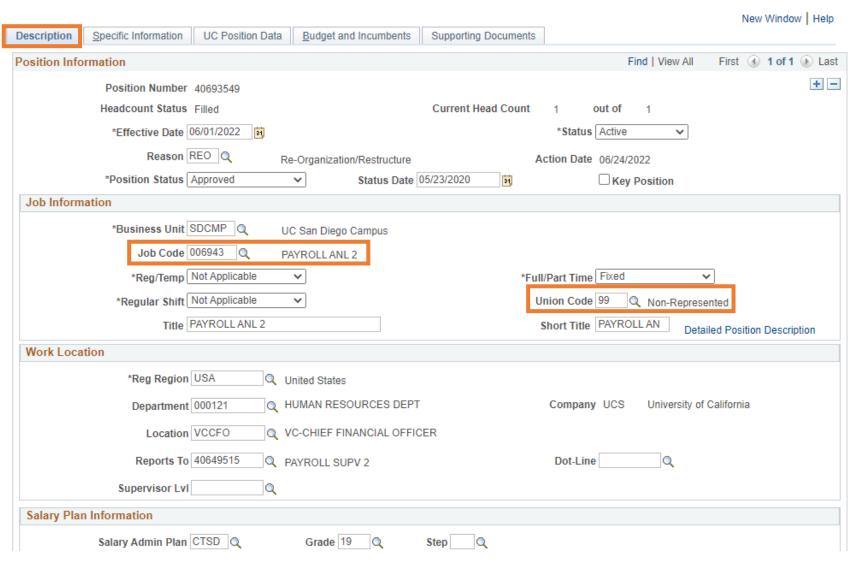


#### **Job Code**

The Job Code drives the Union Code

#### **Union Code**

- The Union Code determines the benefit program for represented employees
- Union dues and fees are also based on the Union Code
- Union Code determines the Employee Relations Code





# Position Data | UC Position Data Tab

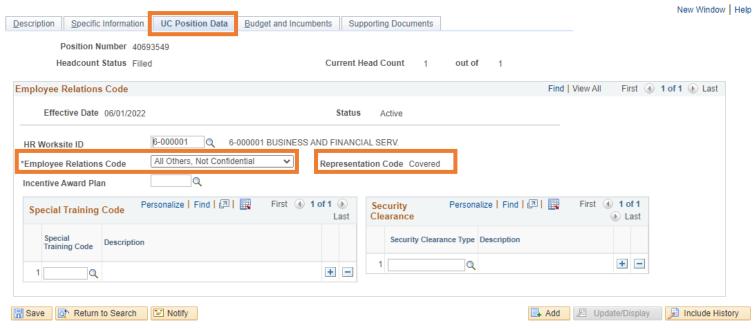


### **Employee Relations Code**

 Drives the benefit program for represented employees

### **Representation Code**

 Uncovered employees are not eligible for rates and/or programs agreed to in active Collective Bargaining Agreements



Description | Specific Information | UC Position Data | Budget and Incumbents | Supporting Documents



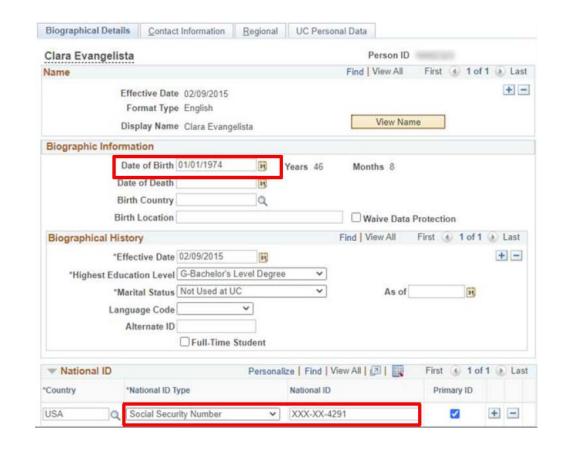
# Modify a Person



**Birth Date** is required to process benefit events

**Social Security Number (SSN)** is required for savings plans and for funding Safe Harbor deductions. Employees with no SSN in UCPath will have a variety of issues including:

- •Inability to enroll in coverage with the following vendors: Delta Dental, VSP, Principal, HealthNet (not Postdocs) and Anthem
- •The employee will not be eligible to receive expedited pay on a pay card
- •Incorrect information with EDD for unemployment benefit purposes
- Issues with Fidelity retirement accounts:
  - UCPath has a process that will derive a value to be used when sending funding to Fidelity
  - ■When the correct SSN is added the employee will have multiple fidelity accounts and a case will need to be submitted to correct and consolidate the accounts.



Note: Future dated hires do not require a Birth Date or SSN but both should be added on the first day of work UCSan Diego



# When to Contact UCPath - Submit a Case



Cases must be submitted to UCPath for corrections in the following scenarios:

Anytime benefits terminate and need to be reinstated - the system will not reinstate benefits real time - benefits eligibility analysis can take up to 30 days

Ex: A Rehire or Reinstatement when a Job End Date has passed and is subsequently updated and extended

When retroactive changes are made to Job Data – including FTE, Duration, or EMPL Class and the change should trigger eligibility for a different benefits package

Ex: An employee's FTE was incorrectly set to 0 and has been updated to 1. Submit a case to have the system re-evaluate the employee's eligibility for benefits. If no case is submitted, the benefits eligibility analysis could take up to 30 days

An employee has incorrect benefits, and you do not understand why after reviewing all of the fields



### **Benefits Office**

- Phone: (858) 534-2816
- Email: benefits@ucsd.edu
- Contact the Sr. Benefits Representative assigned to your Vice Chancellor Area.
- Visit UCnet to explore employee benefits at UC San Diego

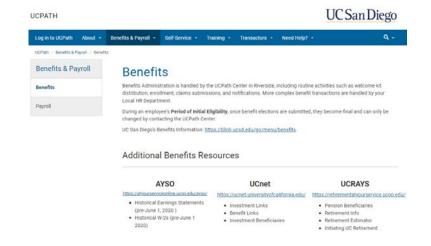
## **UCPath Center**

- Phone: (855) 982-7284
- Submit an Inquiry: Ask UCPath
- Email: ucpath@universityofcalifornia.edu
- Login to UCPath: ucpath.universityofcalifornia.edu
- Chat feature available on Benefits Summary page within UCPath

### Resources



### **UC San Diego Websites**



- https://ucpath.ucsd.edu/benefitspayroll/benefits.html
- https://blink.ucsd.edu/HR/benefits/index.html

### **UCPath Help Site for Transactional Users**



- •Job Aid: Benefit Eligibility & Triggers
- **UPK: View Benefits Summary**
- Job Aid: Benefits Administration (Ben Admin)Eligibility Configuration Fields
- •Job Aid: Action/Reason Codes Impacting Benefits





# Double check the key fields that trigger benefits eligibility

There are no manual overrides
 in UCPath to provide someone
 benefits – all the key fields
 must be reviewed and updated
 to trigger the appropriate
 benefit package



# **Enter Template and PayPath transactions on time**

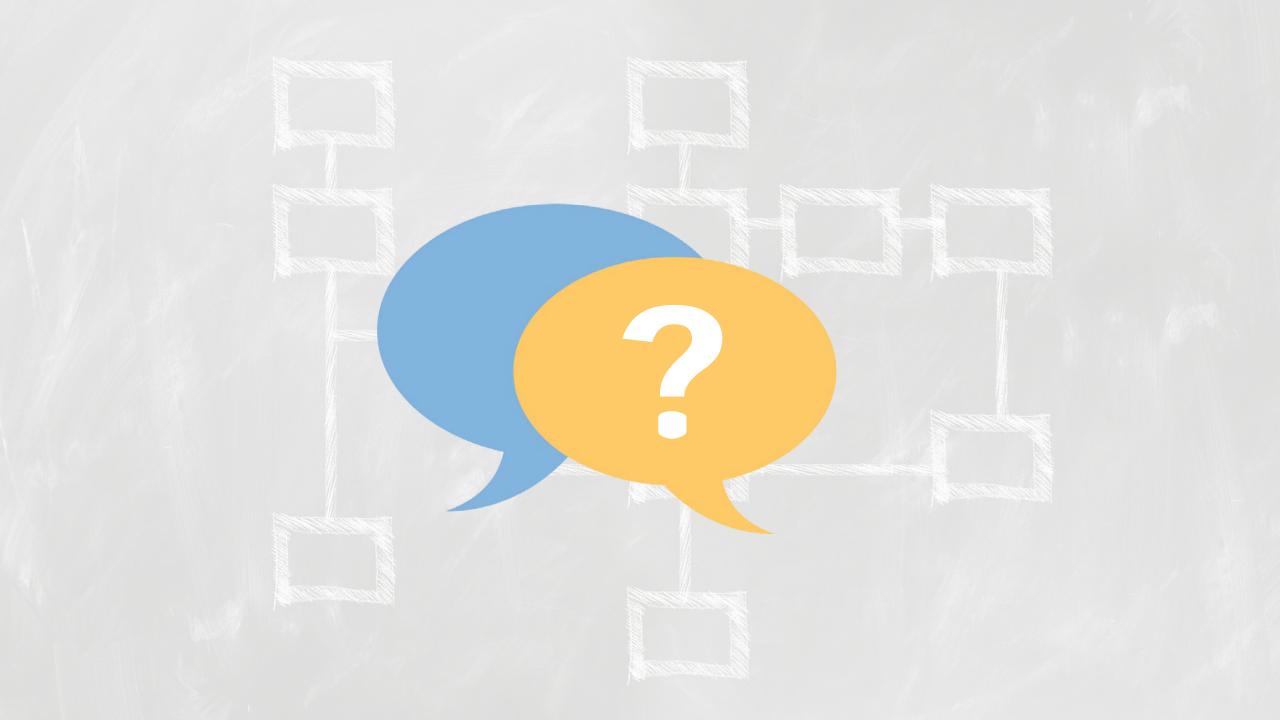
- Self Service Option to enroll is available for 31 days from the effective date of hire
- Benefits enrollment eForm
   available to use in the Forms
   Library (within 31 days of the
   date created / date of entry)



# Don't let employees auto term in error

- Rehire Reinstatement
   Template does NOT reinstate
   benefits. Submit a case to
   UCPC to expedite
   reinstatement of benefits
- Monitor the Expected Job
   End Date Report on BAH





## Notes



- If an employees transfers into our department and their benefit eligibility changes (They were only eligible for CORE benefits and are now eligible for Full Benefits), then will they receive a notification from UCPath letting them know they can change their benefits enrollment? They should but best practice is to have employee's enroll through self service as soon as they are aware of new benefits eligibility.
- BAH.ucsd.edu has a report Benefits Administration Eligibility Configuration Fields Report https://bah.ucsd.edu/hr-payroll/index.html?#report-id-4
- How do we determine the eligibility based on the employees class? Example Short Term Exceptions. Refer
   to Group Insurance Regulations Administrative Supplements to Part II-A
- Is UC Path only using the personal email on file? Where do benefits notifications get sent? Confirmed with UCPC that notifications get sent to all emails in UCPath so please make sure employee's personal email is entered into UCPath.
- Is there more clarification on how the look back period functions for benefits determination? Review SMP section on Group Insurance Regulations Administrative Supplements to Part II-A
- Submit an inquiry to UCPC first and then Contact VC Area HR Benefits rep to escalate <u>Critical</u> Benefits
   ISSUES