

# Benefits Billing/Return from Leave Overview

# OVERVIEW

Term	Definition
<b>Absence Management (AM)</b>	A module in UCPath that UC Leave Administrators use to plan and manage absence events (including extended leaves) and to calculate vacation and sick time. AM is UC's single system of record for all paid time off.
<b>Absence Takes</b>	The number of units (hours) an employee takes in association with an absence.
<b>Approval Workflow Engine (AWE)</b>	A component of UCPath that is used to approve transactions, etc.
<b>Benefits Billing (BB)</b>	The process in which an employee is able to pay for premiums of eligible benefits through direct billing.
<b>Employee Rate</b>	The employee portion of the cost for benefits he/she is enrolled in.
<b>Extended Absence (EA) Request</b>	Transaction Request to place employee on a Paid/Unpaid Leave of Absence. Grid used to submit new leave requests. It has several tabs to capture additional information for the leaves
<b>Job Data</b>	Module in which employee's job records are stored.
<b>Leave with Pay</b>	A Leave of Absence in which the employee continues to get paid and maintain existing benefits. The employee's payroll status will change to Paid Leave of Absence to ensure the employee continues to get paid accordingly.
<b>Leave without Pay</b>	A Leave of Absence in which the employee does not continue to get paid and benefits are discontinued unless the employee elects to maintain benefits by paying applicable monthly premiums through the Direct Billing process. The employee's payroll status will change to Unpaid Leave of Absence to ensure the employee is no longer paid.
<b>Return from Leave (RFL)</b>	When the employee physically returns to work after a leave of absence the actual return date is entered on the EA Transaction and the Return from Leave (RFL) is added to job data making payroll status Active. The process in which an employee's billing account is assessed upon return to work from a leave of absence or short work break.
<b>Short Work Break (SWB)</b>	This action can be used to stop an Employee's pay for a temporary period, but allows the employee to remain on an active status.
<b>Total Cost</b>	The sum of the employee and employer costs for benefits the employee is enrolled in.

- The benefits billing process begins once a **Extended Absence** Transactions is “Approved” by UCPath Center or **PayPath** transaction is “Approved” by the AWE Approver.
- If transaction is approved via Extended Absence, Workforce Administration (WFA) enters the leave in Job Data; if transaction is approved via PayPath, it writes to Job Data automatically.
- The combination of Action/Reason codes on Job Data page creates BAS Activity (Ben Admin event) that is processed in the nightly batch processing, enrolling the employee into Benefits Billing.
  - No separate notification is sent to the Locations when an employee is enrolled in Benefits Billing.

- Types of Leave that trigger Benefits Billing
  - Leave of Absence Without Pay
    - FMLA
    - Non-FMLA
    - Workers' Compensation
- Intermittent/Reduced Schedule leaves are reviewed only for UC Statement completion
- Leave of absence requests are submitted and approved through the Administer Extended Absence page in UCPath.
- Short work breaks (SWB) are submitted and approved through PayPath. SWB is not a type of leave; it is a break in active status.
- Nightly batch processing will trigger the Benefits team, depending on the Leave Type and Paid/Unpaid Block (Action/Reason).

## Responsibilities by party in the Benefits Billing process:

### Employee

- Completes Benefits Billing Election Form and submits to UCPath Center.
- Submits monthly billing payments.

### Location

- Provides Benefits Billing Election Form along with Instruction Sheet and Cost Summary page to the employee.
- Leave Administrator submits an Extended Absence Request in UCPath on behalf of the employee.
- Leave Administrator updates leave of absence in UCPath.
- Leave Administrator updates HCF flag in UCPath
- Location point of contact replies to inquiries and provides requested information through Case Management.

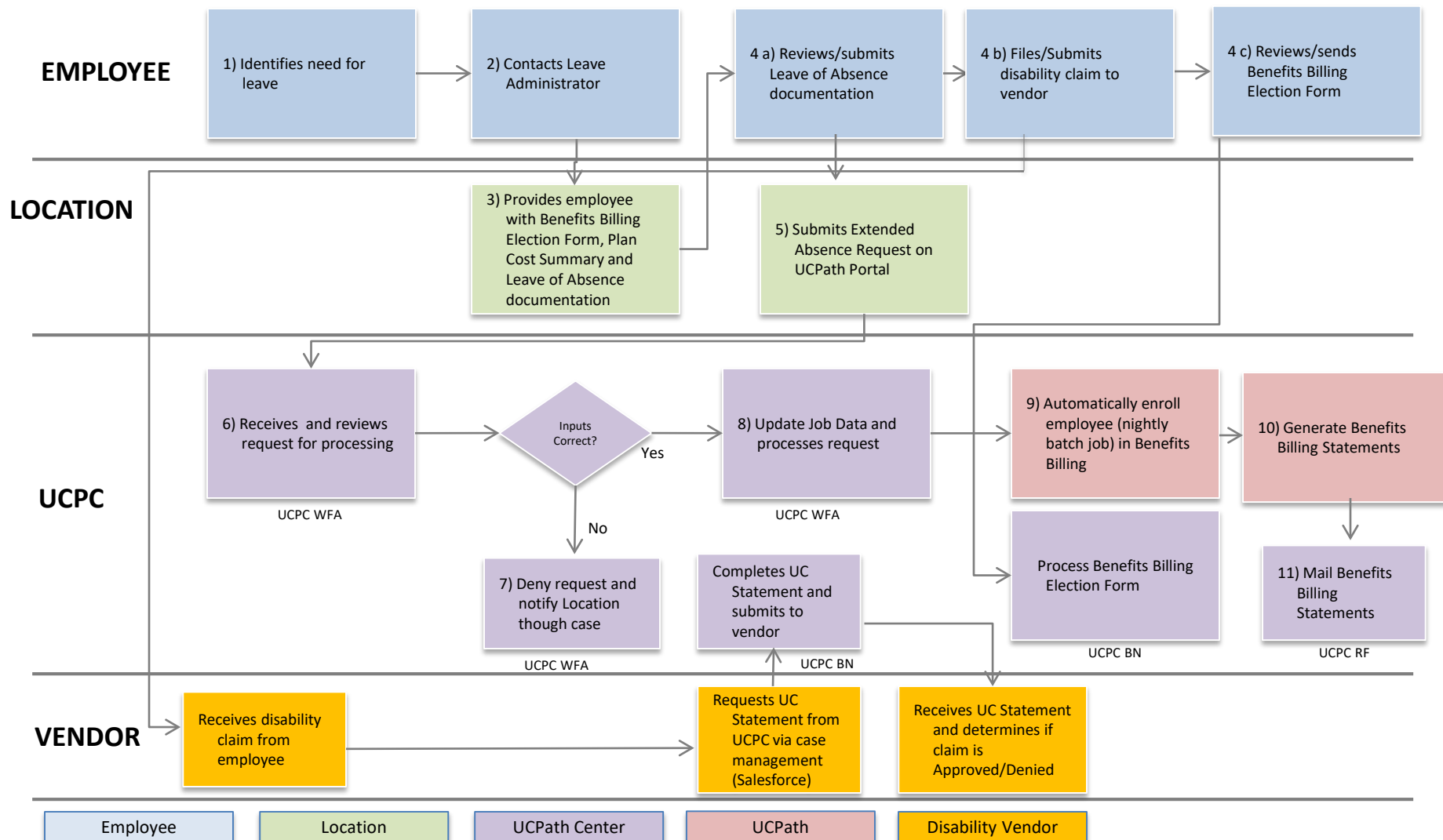
### UCPath Center

- Enrolls employee in Benefits Billing (as applicable).
- Mails monthly Benefits Billing Statements.
- Completes UC Statements.
- Provides disability vendor with any additional information in reference to employee's disability claim.
- Reviews billing accounts and ensures billing charges are in line with the leave reason/leave type and length of leave.

# BUSINESS USE CASE SCENARIOS

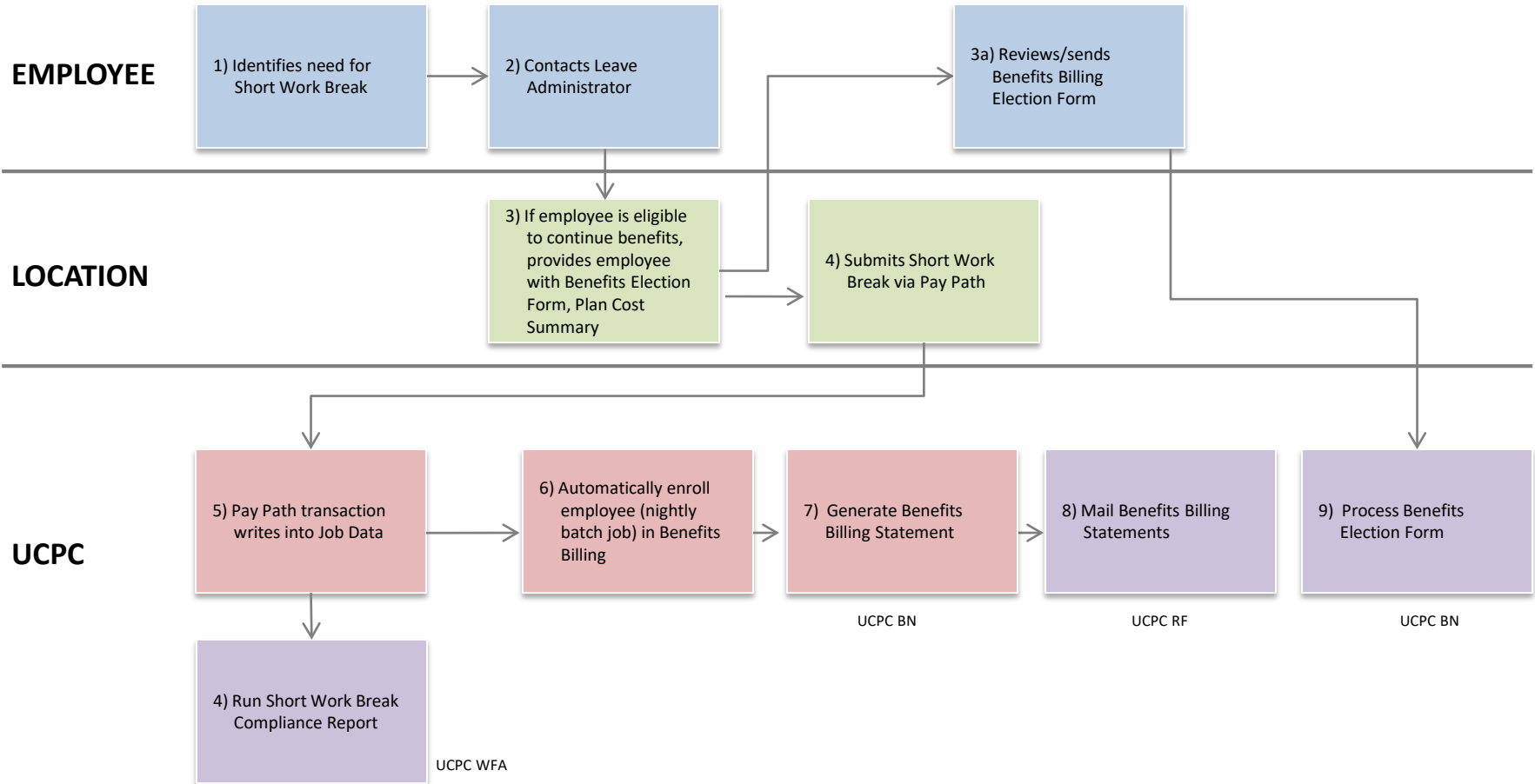
# Process for employees placed on Leave Without Pay

STANDARD PROCESS (HAPPY PATH)



# Process for employees placed on Short Work Break – Pay Path

STANDARD PROCESS (HAPPY PATH)



Employee

Location

UCPath Center

UCPath

Next page – Employee makes payments

QUESTIONS?

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- The employee's enrollment status in Benefits Billing (Active or Inactive) determines whether benefit deductions will be taken from the employee's paycheck.
  - Active Status:
    - As soon as the location enters the Extended Absence Request for an Unpaid Leave of Absence or Short Work Break through PayPath into UCPath in the employee's Job Data is updated the employee is enrolled in and becomes ACTIVE in Benefits Billing.
    - **Any time an employee is active in Benefits Billing, benefit deductions are frozen.**
      - Even if the employee has earnings after the Unpaid LOA is entered, deductions will not be taken until the employee has changed to a Paid LOA or returned to active status, and the Benefits Billing status is inactive.
  - Inactive Status:
    - When the location enters the transaction in Extended Absence Request is submitted to return an employee from leave, the employee is inactivated from Benefits Billing.
    - **Benefit deductions will resume on the next on-cycle check.**
      - If the employee is eligible to make any benefit changes when he/she returns, the check date that the deductions begin is dependent on the timing of the employee's elections. If the employee/location requests an off-cycle check, benefit deductions/refunds will not normally be issued on this check.

- Employees with multiple job records
  - If only one record is on unpaid leave or short work break and remaining job records continue to receive earnings, employee is not enrolled in billing
  - Premiums are deducted from paychecks

Generating Benefits Billing  
Election Form

STANDARD PROCESS (HAPPY PATH)

Benefits Billing Election Form  
Location provides form and cost summary to the employee

Benefit Enrollment Summary | Benefit Deduction Summary

Employee ID 1000 Benefit Record Number 0  
Primary Empl Record 0

Benefits System: Benefits Administration  
Benefit Program: NR Non Represented Monthly  
Benefits Status: Active

Print Summary and Election Form

Benefits As of: 06/14/2018 Refresh

## Current Benefit Enrollments

Employee Name: [REDACTED]  
Employee ID: 1000  
6/14/2018 11:07 AM

Plan Type	Coverage Election	Benefit Plan	Description	Coverage or Participation	Coverage Begin	Employee Monthly Payment	Total Monthly Payment
Medical(10)	Elect	KSCA	Kaiser South	Self + Child(ren) (N)	2016-01-04	99.04	972.40
Dental(11)	Elect	DPPO	Delta Dental PPO	Self + Child(ren) (N)	2016-01-04	0.00	86.24
Vision(14)	Elect	VSP	Vision Service Plan (VSP)	Self-Only	2016-01-04	0.00	12.75
Supplemental Life(21)	Elect	SL1X	Supplemental Life 1x Annual	Salary X 1	2016-01-04	6.34	6.34
Employee & Dependent AD&D(24)	Elect	ADDC	AD & D Employee + Children	\$500000	2017-01-01	6.00	6.00
Total						111.38	1083.73

The location pulls the employee's current benefits summary (sample above) from UCPath and provides it to the employee. It provides a breakdown of the cost, both employee share and total cost.

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**BENEFIT BILLING ELECTION FORM**

Employee ID: 1000  
Date: Jun 14, 2018  
Moreno Valley, CA 92553

\* Please disregard notice if no changes are required and you are not enrolled in Health FSA

Plan Type	Description	Current Coverage	Cancel	Health FSA
Medical(10)	Kaiser South	Self + Child(ren) (N)	<input type="checkbox"/>	<input checked="" type="checkbox"/> Cancel Coverage
Dental(11)	Delta Dental PPO	Self + Child(ren) (N)	<input type="checkbox"/>	<input checked="" type="checkbox"/> Continue Coverage
Vision(14)	Vision Service Plan (VSP)	Self-Only	<input type="checkbox"/>	<input checked="" type="checkbox"/> Reduce amount
Supplemental Life (21)	Supplemental Life 1x Annual	Salary X 1	<input type="checkbox"/>	<input checked="" type="checkbox"/> Continue Coverage
Employee & Dependent AD&D(24)	AD & D Employee + Children	\$500000	<input type="checkbox"/>	<input checked="" type="checkbox"/> Make up contributions

If option is not selected it will DEFAULT to: Cancel Coverage

I understand that for any plan I do not cancel, I agree to pay the monthly premium. For any plan I choose to cancel, I understand that I will not be allowed to re-enroll until I return to pay status.

If I want to make changes to my enrollment or cancel coverage at a later date, I will contact the UCPath Center at 855-982-7284.

My signature below indicates that I have read and agree to the Disclaimers/Notifications outlined in the form instructions:

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Email Address: \_\_\_\_\_ Contact Phone#: \_\_\_\_\_

You have three options to return your form:

1. Via the preferred secure UCPath system at [www.ucpath.universityofcalifornia.edu](http://www.ucpath.universityofcalifornia.edu)
2. By fax to the UCPath Center at: (855)982-2329
3. By mail to the UCPath Center at:  
UCPath Center  
14350-1 Meridian Parkway  
Riverside, CA 92518

**For Direct Billing Statement Only**

Moving out of area for duration of leave: ☐ Yes ☐ No

Temporary mailing address, if applicable:  
Street Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Employees can update their address for the leave only.

Benefits Billing Statement  
Mailed monthly to employees

STANDARD PROCESS (HAPPY PATH)

The statement includes key pieces of information for the employee:

- Coverage month,
- due date,
- and a breakout of the coverages that they are being billed for.

There are also instructions for payment. Employees are provided with two options

- 1) online payment – a fast and convenient method. UCPath is notified of online payments in 3 business days.
- 2) Employees can mail in a check/money order. UC Path is notified of personal check payments within 3 weeks.

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## BENEFITS BILLING STATEMENT

<b>T [REDACTED]</b> <b>3 [REDACTED] AVE.</b> <b>APT 105</b> <b>LOS ANGELES , CA 90018</b>	<b>Employee ID:</b> 10 [REDACTED] <b>As of Date:</b> 04/25/2019 <b>Billing Period:</b> 05/2019 <b>Coverage Month:</b> JUNE
--	---

PAYMENT INFORMATION	
Payment Due Date: 05/31/2019	
Total Amount Due: \$261.48	Current Available Credit: \$0.00
Note: Your coverage will end if payment is not received within 15 days after the payment due date and effective to the last month of paid coverage. Partial payments not accepted. Please disregard billing statement if total amount due is \$0.00.	

Plan Type	Description	Coverage/Participation	Monthly Cost
Medical	Kaiser South	Self-Only	\$18.97
Dental	Delta Dental PPO	Self-Only	\$0.00
Vision	Vision Service Plan (VSP)	Self-Only	\$0.00
Legal Services	ARAG Legal	Self-Only	\$10.87
Supplemental Life	Supplemental Life 4x Annual		\$56.32
Employee & Dependent AD&D	AD & D Employee		\$1.00
Current Monthly Charges			\$87.16
Previous Amount Due			\$174.32
Previous Credit Amount			\$0.00
<b>Total Amount Due</b>			<b>\$261.48</b>

To make changes to your enrollment or cancel coverage, contact the UCPath Center at 855-982-7284.

To pay via e-check please visit: <a href="https://commerce.cashnet.com/UCPATHBenefitsbillingportal">https://commerce.cashnet.com/UCPATHBenefitsbillingportal</a>	Make checks payable to: UC Regents OR	Please send payment to: UCPath Ctr - Production Benefits Box 957187-1125 Murphy Hall 405 Hilgard Ave Los Angeles, CA 90095-7187
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- LFG submits request for UC Statement through Case Management

Requested By	Vendor
Topic	Leaves of Absence
Category	Disability / Life Insurance
Subcategory	Disability UC Statement
Subject	New UCLAMC claim for [REDACTED] (secure)
Description	Hello,

We have received a UCLAMC claim for [REDACTED], DOB 0[REDACTED]. Please complete the Earnings And Last Date Worked Confirmation Statement, and submit directly to the Claims Examiner, Felicia [REDACTED], at Fel[REDACTED]@lfq.com. Please copy [ucpath@lfq.com](mailto:ucpath@lfq.com) in your reply. Thank you and have a great day.

The secure message expires on Dec 12, 2019 @ 03:15 PM (GMT).

Do not reply to this notification message; this message was auto-generated by the sender's security system. To reply to the sender, click Open Message.

If clicking Open Message does not work, copy and paste the link below into your Internet browser address bar.

<https://securemail-lfq.com/s/e?>

Want to send and receive your secure messages transparently?  
Click here<[http://www.zixcorp.com/info/zixmail\\_ZMC](http://www.zixcorp.com/info/zixmail_ZMC)> to learn more.

- One notable change for a location when they come onto UCPath is that LFG begins working directly with UCPath and the location will no longer receive the log from LFG.

## Unpaid-Block Available

- UCPath reviews Extended Absence and Job Data for Unpaid-Block transaction/information
  - If Unpaid-Block is available, UCPath proceeds to complete UC Statement and submit to LFG case manager
  - Sometimes a leave has been 'Saved' but not submitted for Approval.

## Administer Extended Absence

## Search Criteria

Show Requests by Status

Transaction Number

Approver

Initiator

Employee ID

Business Unit

Leave

FMLA/CFRA/PDLL Leave

Name

Last Name

From Date

Through Date

## Administer Extended Absence

Personalize

Extended Absence Details			JED Additional Earnings Codes		Workers' Compensation		Sabbatical	Pay Period Dates for AY Academics		Job Overrides	Attachments		
Transaction Number	Empl ID	Name	* Start Date	* Expected Return Date	Actual Return Date	Leave		FMLA/CFRA/PDLL Leave	Absence Reason	Action	Action Reason	Workflow Status	Date Submitted
1 25	10	S M	07/04/2018	06/29/2019	06/29/2019	Family Illness/Injury*		Family SHC-FMLA/CFRA	Intermittent/Reduced Schedule			Approved	09/27/2018
2 25	10	M	08/15/2018	11/01/2018	11/01/2018	Medical Leave*		Employee's SHC-FMLA/CFRA	Intermittent/Reduced Schedule			Approved	10/04/2018
3 2	10		05/23/2019	05/28/2019		Medical Leave*		Employee's SHC-FMLA/CFRA	Paid-Block	PLA	MED	Approved	06/03/2019
4 26	10	M	05/28/2019	07/09/2019		Medical Leave*		Employee's SHC-FMLA/CFRA	Unpaid-Block	LOA	MED	Submitted	06/03/2019

## Unpaid-Block Not Available

- UCPath reviews Extended Absence and Job Data for Unpaid-Block transaction/information
  - If Unpaid-Block is NOT available, UCPath proceeds to reach out to location requesting Unpaid-Block information/update

Administer Extended Absence

**Search Criteria**

Show Requests by Status:

Transaction Number:

Approver:

Initiator:

Employee ID:  x

Business Unit:

Leave:

FMLA/CFRA/PDLL Leave:

Name:

Last Name:

From Date:

Through Date:

**Administer Extended Absence** Personalize

Extended Absence Details		JED Additional Earnings Codes	Workers' Compensation	Sabbatical	Pay Period Dates for AY Academics	Job Overrides	Attachments					
Transaction Number	Empl ID	Name	*Start Date	*Expected Return Date	Actual Return Date	Leave	FMLA/CFRA/PDLL Leave	Absence Reason	Action	Action Reason	Workflow Status	Date Submitted
1 25	1		07/04/2018	06/29/2019	06/29/2019	Family Illness/Injury*	Family SHC-FMLA/CFRA	Intermittent/Reduced Schedule			Approved	09/27/2018
2 25	1		08/15/2018	11/01/2018	11/01/2018	Medical Leave*	Employee's SHC-FMLA/CFRA	Intermittent/Reduced Schedule			Approved	10/04/2018
3 2	1		05/23/2019	05/28/2019		Medical Leave*	Employee's SHC-FMLA/CFRA	Paid-Block	PLA	MED	Approved	06/03/2019

## Unpaid-Block Not Available

- This is an example of when there is no leave in the system. Upon seeing this, UC Path would reach out via case to get information from the location regarding the leave.

**Administer Extended Absence**

**Search Criteria**

Show Requests by Status

Transaction Number

Approver

Initiator

Employee ID

Business Unit

Leave

FMLA/CFRA/PDLL Leave

Name

Last Name

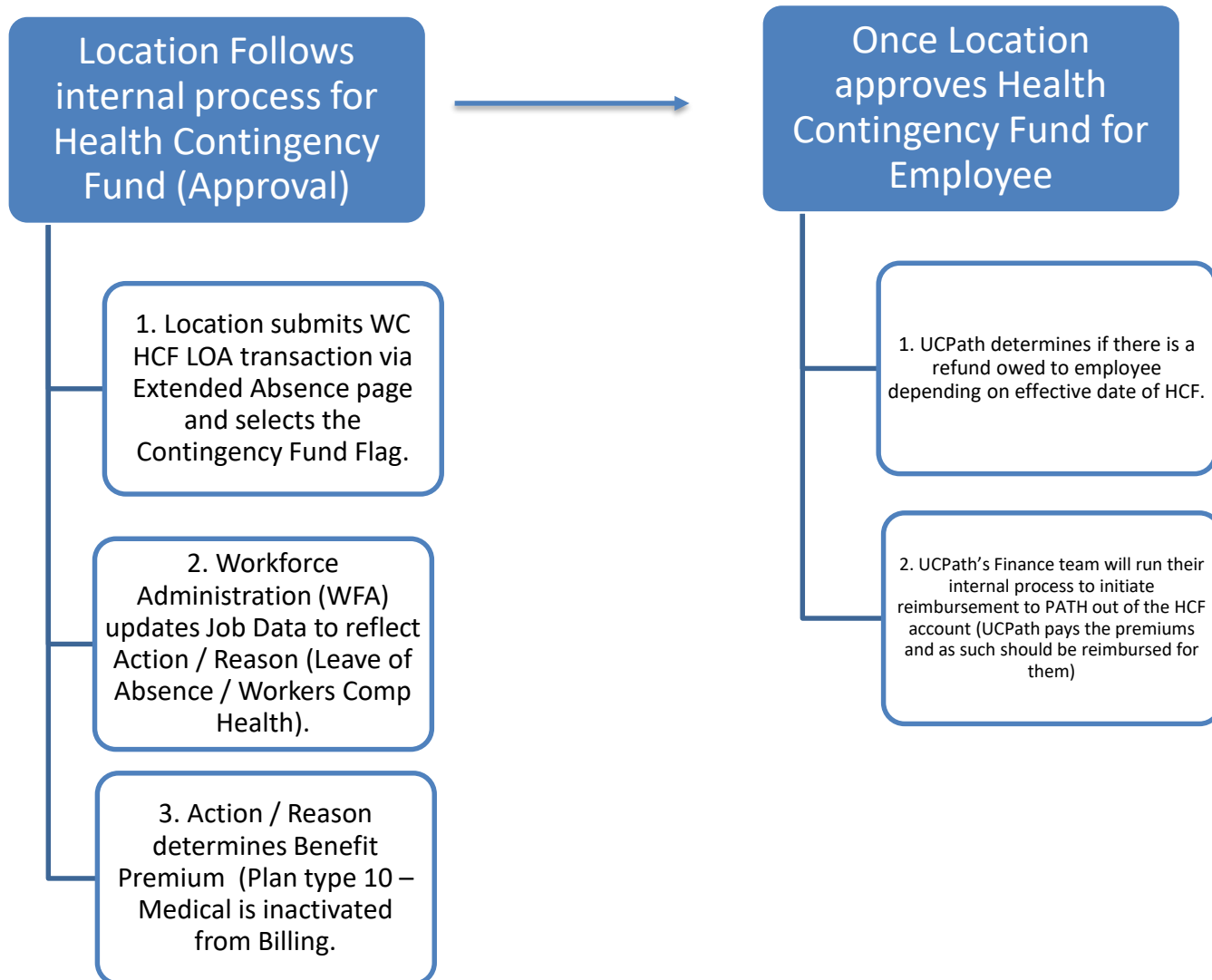
From Date

Through Date

**Message**

No results found (0,0)

## Health Contingency Fund



The Contingency Fund Flag is located in Extended Absence in the Workers' Compensation tab. If employee has been approved for HCF then the flag must be checked.

Favorites ▾ Main Menu ▾ > Global Payroll & Absence Mgmt ▾ > Payee Data ▾ > Maintain Absences ▾ > UC Customizations ▾ > Request Extended Absence

ORACLE

Request Extended Absence

Exempt Benefit Summary Review Absence Balance

#### FMLA/CFRA Eligibility

Eligible for FMLA?: ☒ FMLA Override: ☐

Eligible for CFRA?: ☒ CFRA Override: ☐

Service Months: 71.00 Eligibility Hours: 2261.05

Disclaimer: Exempt employee may be eligible regardless of the eligibility hours. [More Info](#)

#### FMLA/CFRA/PDLL Balances & Takes

FMLA Balance: FULL CFRA Balance: FULL PDLL Balance: FULL

FMLA Taken: 0 CFRA taken: 0 PDLL taken: 0

Disclaimer: Ending Balances only reflect absences that have been processed as of the date displayed. [More Info](#)

Extended Absence Summary

Personalize | Find | View All | First 1 of 1 Last

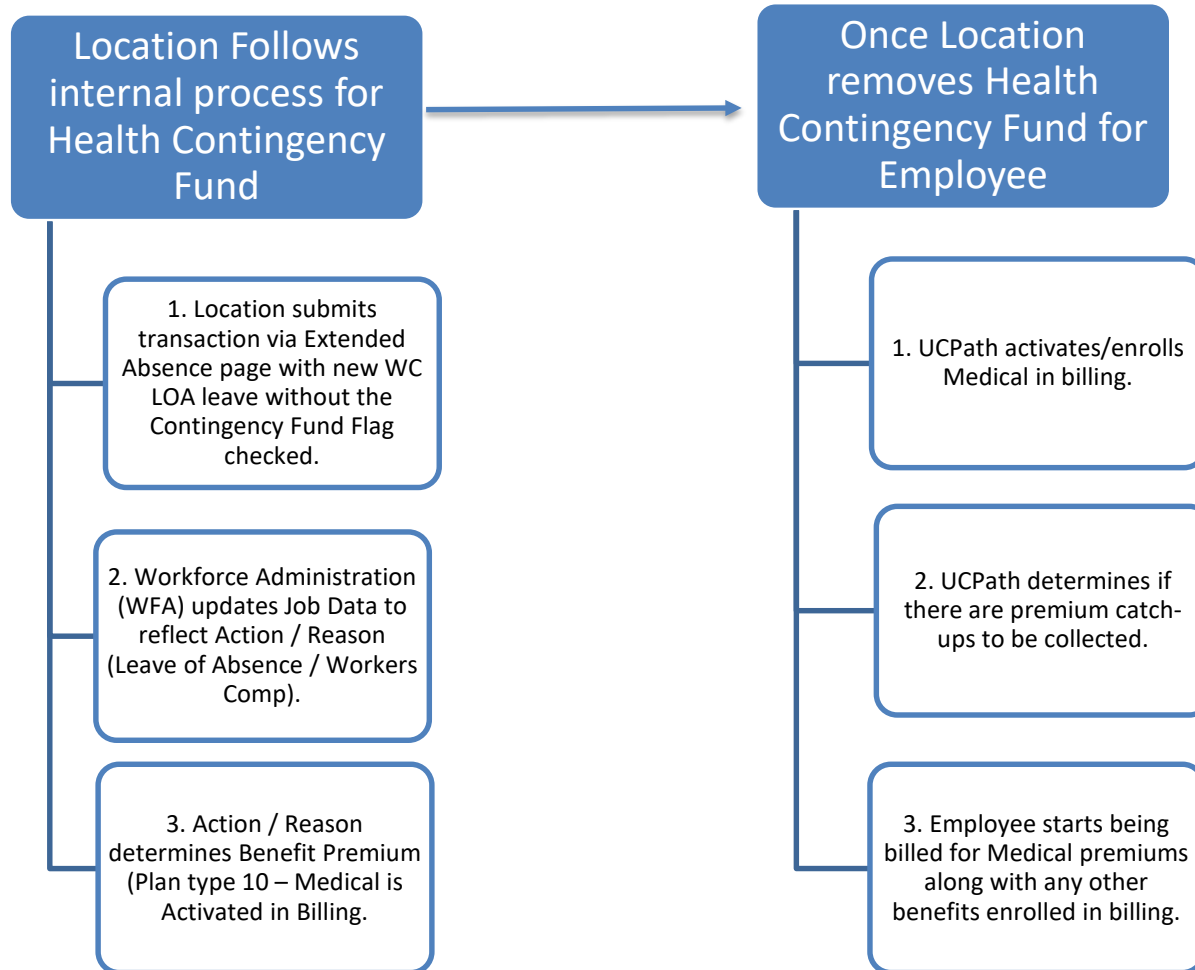
Extended Absence Details		JED Additional Earnings Codes	Workers' Compensation	Sabbatical	Pay Period Dates for AY Academics	Job Overrides	Attachments	
Transaction Number	Start Date	Expected Return Date	Actual Return Date	Leave	FMLA/CFRA/PDLL Leave	Paid/Unpaid	Last Date Worked	FMLA/CFRA/PDLL Adjustment Hours
1								

Notes

New Extended Absence Request

Personalize | Find | View All | First 1 of 1 Last

Extended Absence Details		JED Additional Earnings Codes	Workers' Compensation	Pay Period Dates for AY Academics	Job Overrides	Attachments							
*Start Date	*Expected Return Date	Actual Return Date	Leave	FMLA/CFRA/PDLL Leave	Paid/Unpaid	ESL Percent	WCS Percent	WCN Percent	WCP Percent	WCR Percent	Contingency Fund Flag		
1 07/09/2018	07/23/2018		Workers' Comp								<input type="checkbox"/>		





## Once HCF Exhausts Scenario

- Location submits Workers' Comp Unpaid-Block transaction with HCF flag checked, with Start Date 08/11/2018 and an Expected Return Date of 12/01/2019
- HCF exhausts effective 02/28/2019 (prior to Expected Return Date)
  - Location must edit the Workers' Comp Unpaid-Block to reflect an Expected Return Date of 02/28/2019
  - Location must submit new Workers' Comp Unpaid-Block without HCF flag checked with a Start Date of 02/28/2019 and an Expected Return Date of 12/01/2019

By submitting the Workers' Comp HCF leaves in this manner, Job Data will have the history of the Health Contingency approved WC Leave of Absence.

Administer Extended Absence

Edit original HCF LOA and update Expected Return Date


Personalize | Find | View All |   First 1 of 1 Last


Extended Absence Details

JED Additional Earnings Codes

Workers' Compensation

Job Overrides

Attachments 


*Start Date	*Expected Return Date	Actual Return Date	Leave	FMLA/CFRA/PDLL Leave	Paid/Unpaid	REG Percent	ESL Percent	WCS Percent	WCN Percent	WCP Percent	WCR Percent	Contingency Fund Flag
1 08/11/2018	12/01/2019		Workers' Comp*		Unpaid-Block							
	02/28/2019											

1 2/28/2019

12/01/2019

Workers' Comp\*

Unpaid-Block



## Responsibilities by party in the Return from Leave process:

### Employee

- Notifies location Leave Administrator of return to work and provides documentation, if applicable
- Submits enrollment forms or enrolls via UCPath online to reinstate benefit coverage, if eligible

### Location

- Leave Administrator updates Extended Absence Request to reflect actual return to work date in UCPath on behalf of the employee.

### UCPath Center

- Processes Return From Leave to include the following steps, as applicable to the individual scenario:
  - Reinstates Basic/Voluntary Disability plans
  - Provides enrollment options to returning employee
  - Processes re-enrollment actions requested by employee
  - Reconciles benefit premiums related to leave and adjusts via Payroll

# Process for Returning Employee from Leave of Absence

STANDARD PROCESS (HAPPY PATH)

## EMPLOYEE

Submits medical  
release to Leave  
Administrator

## LOCATION

Updates Extended  
Absence Request  
with return date

## UCPATH CENTER

Updates Job Data  
and processes  
Extended Absence  
Request

Runs daily query to  
identify EE's  
returning from  
leave

Assesses Return  
From Leave data  
to identify EE's  
reinstatement  
options

Creates RLB enrollment  
event & notifies  
employee to enroll via  
UCPath Online

Yes

Was EE on  
unpaid  
leave > 120  
days?

No

Did EE return  
in a new plan  
year/waive  
plans during  
leave?

No

Yes

Did EE  
waive  
any plans  
during  
leave?\*

No

Notifies EE via case  
management of re-  
enrollment options  
and sends RFL  
Reinstatement Form

Yes

UCPath automatically  
reinstates VLTD/VSTD  
as applicable

Reconciles billing  
account/payroll  
deductions

Notifies EE of  
deductions/refund  
s and processes  
during next payroll  
on-cycle

End

Employee

Location

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- The Return From Leave team manages the reinstatement of benefits and reconciliation of premiums for the leave period.
- The Return from Leave process begins when an employee returns from leave/short work break, terminates or retires during the leave of absence.
- The UCPath Center runs the Reinstatement from LOA/SWB report daily to identify employees returning from a leave of absence.

## Return from Leave Process

- The UCPath Center reviews the leave details and benefit reinstatement occurs as follows\*:

Leave  $\geq$  120 Days

EE treated as newly eligible (new PIE) and an RLB (Return From Leave Benefits) event is opened on Self-Service

EE is notified via automated notification that the enrollment event is open

Basic Life/Basic Disability are automatically reinstated.

EE must submit form or complete RLB online to reinstate VLTD/VSTD plans.

Leave <120 Days / Same Plan Year

EE may be reinstated to same coverage and dependents effective at the time of the leave, or dependents that became eligible during the leave

Basic and Voluntary Long/ Short Term Disability plans are reinstated by the UCPath Center if the employee was enrolled prior to the leave of absence

Notification of enrollment options and Reinstatement Form is sent via case management email

RFL in New Plan Year/< 120 Days

EE is treated as newly eligible. For non-Section 125, coverage may be reinstated to same coverage/dependents effective at the time of the leave.

Basic and Voluntary Long/ Short Term Disability plans are reinstated by the UCPath Center if the employee was enrolled prior to the leave of absence

Notification of enrollment options and Reinstatement Form is sent via case management email

UCPath communicates via Case with the employee regarding their Return From Leave Options

*\*Note: Per the Group Insurance Regulations, these reinstatement options only apply to employees who have voluntarily discontinued any plans during the leave.*

- After providing reinstatement options to employee, the UCPath Center reconciles benefit premiums.
  - This process is completed for paid and unpaid leaves
  - Unpaid charges in the billing account and/or missed payroll deductions will be taken via payroll deduction since the employee has returned
    - Employees should not submit payment via personal check after returning from leave
  - Employee will be notified via case management email of any premiums due and the planned deduction date
  - For large balances due, the employee can request a payment plan which extends the re-payment period
  - If the employee has overpaid via Benefits Billing, they will be refunded via an after-tax deduction code through their regular payroll check
- All leave factors are reviewed during the reconciliation process, including receipt of Health Contingency Funds, Waiver of Premium, and enrollment/premium changes due to life events
- The Return From Leave process ends when the employee is reinstated/enrolled in the appropriate benefits, balances/refunds due are accounted for, and the employee is no longer active in the benefit billing module (will no longer receive billing statements)

Return from Leave Health Benefits  
Reinstatement Form

It is your responsibility to complete and submit this form to the UCPath Center by 5 pm PST on the 31<sup>st</sup> day of your PIE. Required fields must be completed in order for your form to be processed. Click to access [form instructions](#).

## + \*Indicates Required Fields

1. **PERSONAL INFORMATION:** Enter your personal information. Your UCPath Employee ID# is listed on your earnings statements.

Employee ID # (8 Digits)	Last Name*	First Name*	M.I.
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone Number (numbers only; no spaces)	Email Address		
<input type="text"/>	<input type="text"/>		

2. **DEPENDENTS:** Starting with yourself, list each dependent and enter his/her personal details. You must complete the following section for all dependents who will be added/deleted. Select 'A' in the appropriate benefit column to add, or 'D' to delete/cancel from your coverage. You may only enroll family members into plans in which you are enrolled. The Affordable Care Act (ACA) requires employers to obtain Social Security numbers for employees, spouses, domestic partners and dependents.

Name* (Last, First, Middle Initial)	Birth Date*	Gender (M/F)	Relationship Code*	Employee Tax* Dependent? (Yes/No)	Spouse/Dom Partner Tax* Dependent? (Yes/No)	Social Security Number	Medical	Dental	Vision	Legal	Life	AD&D
Listed in Section 1			Self									
1.												
2.												
3.												
4.												
5.												
6.												
7.												
8.												
9.												

\*Relationship Codes: S = Spouse R = Registered Domestic Partner N = Not Registered Domestic Partner C = Child (biological or adopted)  
P = Stepchild G = Grandchild W = Legal Ward K = Domestic Partner's child\* or grandchild O = Over age Disabled Child\*

\*Dependent Eligibility requirements may be found in the "Eligible Family Members" section of the [A Complete Guide to your UC Health and Welfare Benefits](#).

\*If your domestic partnership is registered and you are the child's stepparent under state law, enter Code "P" for Stepchild. Otherwise, enter code "K."

\*Must be a tax dependent of employee or spouse/domestic partner, unless SSI exception applies.

3. **TAX SAVINGS ON INSURANCE PREMIUMS (TIP)**

Your medical premium deductions will automatically occur on a pre-tax, salary reduction basis. If you wish to decline and have post-tax deductions, instead, check the below box and place your initials next to it. To learn more, you may go to the [TIP summary plan description](#). ☐ Decline/Opt Out of TIP \_\_\_\_\_ Initials

- FSA Plans – When an employee goes out on an unpaid leave, the FSA plans will terminate
- The RFL team ensures that the FSA plans are reinstated upon their return.
  - Health FSA will automatically reinstate in the system
  - Dep Care requires a manual reinstatement
- During the unpaid leave, the employee will be unable to submit claims
- Election amount is recalculated upon RFL
  - Example: Johnny is a monthly employee with an annual election to Health FSA of \$1,200. His contribution is \$100 per month.

Johnny goes out on an unpaid leave of absence for the month of June and did not make his contribution.

RFL impact: His annual election will remain the same (\$1,200) but his contributions will be increased to make up for the missed June contribution

- The UCRP buyback notification is sent to employees to advise that they may be eligible to buyback time.
- Employees who have been on an unpaid leave for 29 days or more will receive a UCRP buyback notification
- The UCRP buyback Notification is a manual process sent via Salesforce.
- This notification is a courtesy email for informational purposes. If employees have additional questions they should contact RASC.

# Variables that can impact the process

Variable	Impact
Extended Absence Request to return employee from Unpaid LOA is submitted late	<p>Employee will remain active in Benefits Billing until the RFL is submitted via Extended Absence. While active in Benefits Billing, system functionality stops any benefit deductions from being taken via payroll. Employee may receive pay checks with no deductions, which will cause them to owe retroactive benefit deductions.</p> <p>If employee remains on leave status, he or she will continue to receive Benefits Billing statements until the return information is updated</p>
Employee switches back and forth between Paid and Unpaid LOA	UCPath Center will account for premiums paid through payroll deductions and via Benefits Billing upon the employee's return from leave or return to paid status
Incorrect return from leave dates are entered and/or leave dates are adjusted	Return from leave may have already been processed based off original dates. UCPath Center has a process in place for corrections, however, reinstatements may have already occurred if the corrections are not made timely.
Employee is eligible to reinstate plans and/or make election changes due to length of leave	Deductions will not resume until employee submits new elections via UCPath online or via form. Coverage is retroactive to RFL date so employee may owe additional premiums once benefits are reinstated.

# KEY TAKEAWAYS

- If a return from leave transaction is not submitted timely:
  - The premiums will not be deducted through payroll and the employee will continue to be billed through benefits billing.
- Voluntary Disability reinstatement is a manual process and can sometimes take about a week to reflect in the employee's Benefits Summary
- Benefit Billing statements are sent in advance of the coverage month.
  - An employee may return in April and receive a billing statement for June coverage depending on the timing of the return from leave and the mailing of the statements.
  - In most cases, the charges are zeroed out in Benefits Billing and collected via the regular payroll check. The employee is then notified to disregard the statement when their return from leave is processed.
- Please ensure that employees are counselled on disability eligibility during a leave of absence.
  - We receive many cases from employees who are unaware that their Basic and Voluntary Disability plans will be waived during an unpaid leave or paid medical leave.
- Locations not tracking their leaves in PPS – those leaves should be updated in PPS as that is the data that will convert over to UCPath

# CURRENT TRENDS

- Location submitted an Extended Absence request detailing the **Leave Type** as FMLA and the **Comments** sections stated “This is a non-FMLA leave”.
  - Conflicting information in the Extended Absence panel may require a reach out to Location from the UCPath Center, causing delay in processing the leave request.
  - Conflicting information in the type of leave may cause the employee to be billed incorrectly for premiums.
- Location is responsible for submitting a separate leave request any time the leave type and paid block changes during the employee’s leave.
- When returning an employee from leave, Location will be expected to ensure that the Expected Return Date and Actual Return Date match.
- When submitting an Extended Absence request, do not include the actual return date at the start of the leave.
  - This may result in adjustments to billing or issues should a leave be extended
- Do not hold Extended Absence Request transactions.
  - Some locations were holding transactions so that deductions could be taken through payroll, however this has impacted/delayed the disability claim

# QUESTIONS?

# APPENDICES

Scenario	Sender	Receiver	Method(s)
Submit request for leave (with pay, without pay, or sabbatical)	Employee / Location	Location / UCPath Center	Various / UCPath
Send additional information (as needed)	Location	UCPath Center	Case/Email response
Generate and send benefits billing statements	UCPath	Employee	Mail to home/ mailing address
Submit payment for benefits	Employee	UCPath Center	Mail
Send notification of delinquency (as applicable)	UCPath Center	Employee	Mail
Send notification of de-enrollment (as applicable)	UCPath Center	Employee / Location	Case email
Send election packet and custom benefits forms (as applicable)	UCPath Center	Employee	Mail
Submit direct billing election form	Employee	UCPath Center	UCPath Inquiry
Submit Extended Absence request to return employee to active status	Location	UCPath Center	UCPath
Send notification of new benefits event	UCPath	Employee	Email
Send notification of enrollment eligibility for appropriate plans (as applicable)	UCPath Center	Employee	Case email
Submit Return from Leave Benefits form	Employee	UCPath Center	UCPath Inquiry / Mail / Fax
Submit benefit elections	Employee	UCPath Center	UCPath

# Disability Rider Process

## For UCPath Locations

## What is the Disability Rider Process?

The University of California Voluntary Disability Insurance Plan includes a Disability Continuation Rider which allows employees to elect to continue Voluntary Disability Coverage and to cover full pre-leave pay during certain types of approved leaves for professional development.

## Responsibility

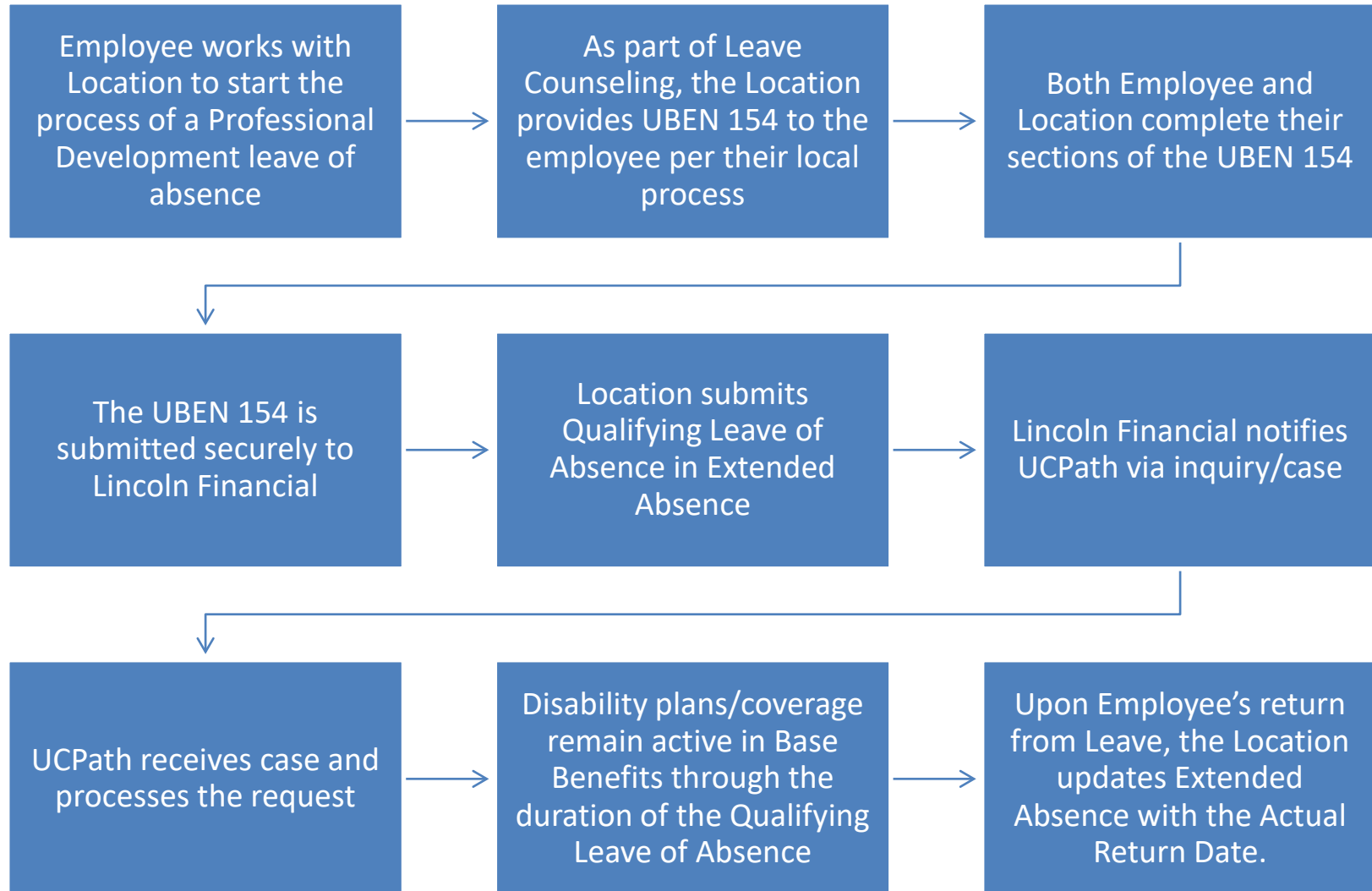
The process of applying for the Disability Rider process is an employee/Location responsibility/process.

If/When the application for the Disability Rider is approved, UCPath is then notified and processes accordingly.

## Impact

These occur rarely/are very infrequent.

# Process Overview



- Both employee and Location must complete their respective sections of the UBEN 154

**RIDER ENROLLMENT  
VOLUNTARY DISABILITY CONTINUATION**  
UNIVERSITY OF CALIFORNIA HUMAN RESOURCES  
UBEN 154 (R9/19)—Group Policy 037972

Send completed application and total calculated premium payment (checks made payable to Lincoln Financial Group) to:

Lincoln Financial Group  
100 Liberty Way  
MS 01G-Attn: Shauna Smith  
Dover, NH 03820  
Shauna.Smith@lfg.com

Incomplete form could delay processing. **Shauna Smith will send confirmation of full payment and enrollment form within 5 days of receipt.**

**EMPLOYEE'S STATEMENT**

NAME (Last, First, Middle Initial)		BIRTHDATE	EMPLOYEE NO.
MAILING ADDRESS WHILE ON LEAVE (Number, Street)		CAMPUS/DEPARTMENT	CAMPUS PHONE (       )
MAILING ADDRESS WHILE ON LEAVE (City, State, ZIP, Country)		CAMPUS ADDRESS (Room, Building)	
PHONE NUMBER (       )	EMAIL ADDRESS	BEGINNING/ENDING DATES OF LEAVE (Not to exceed 2 years)	

**Calculation of Premium Due**

Pre-leave Monthly Covered Salary* Rate (maximum = \$21,429)	x	VSTD, VLTD Continuation Rate for your age (as of January 1)	x	Total months of leave (not to exceed 24)	=	Premium Due (Send with completed application to address listed above.)
--	---	--	---	---	---	--

\* Based on 100% monthly salary rate for your appointment for last full month before leave begins

**UNIVERSITY'S STATEMENT (To be completed by a University Representative and sent to Lincoln Financial Group)**

TYPE OF QUALIFIED LEAVE (Attach PAF or other official documentation to this application)

APPROVED TIME PERIOD OF QUALIFIED LEAVE (From MM/DD/YY to MM/DD/YY)

PRE-LEAVE MONTHLY COVERED SALARY RATE

\$

ACTUAL SALARY FOR THE LAST FULL MONTH BEFORE THE APPROVED, QUALIFIED LEAVE

\$

Applicant is enrolled in the University's VSTD, VLTD or both immediately before beginning of Qualified Leave ..... Yes ☐ No ☐Applicant is actively-at-work as of last full day worked before Qualified Leave ..... Yes ☐ No ☐

Date of last full day worked ..... MM / DD / YY

Reactivation Trigger Date \_\_\_\_\_ (To be completed by Benefits Office at the time of enrollment in Rider. Date is 60 days before pre-approved ending date of Qualified Leave.)

Please check location from which the paycheck is issued:

- |                                   |                                 |                                |                                 |                                 |                                 |                               |
|-----------------------------------|---------------------------------|--------------------------------|---------------------------------|---------------------------------|---------------------------------|-------------------------------|
| <input type="checkbox"/> ASUCLA   | <input type="checkbox"/> UCB    | <input type="checkbox"/> UCI   | <input type="checkbox"/> UCLAMC | <input type="checkbox"/> UCR    | <input type="checkbox"/> UCSF   | <input type="checkbox"/> UCSC |
| <input type="checkbox"/> Hastings | <input type="checkbox"/> UCD    | <input type="checkbox"/> UCIMC | <input type="checkbox"/> UCM    | <input type="checkbox"/> UCSD   | <input type="checkbox"/> UCSFMC | <input type="checkbox"/> ANR  |
| <input type="checkbox"/> LBNL     | <input type="checkbox"/> UCDCMC | <input type="checkbox"/> UCLA  | <input type="checkbox"/> UCOP   | <input type="checkbox"/> UCSDMC | <input type="checkbox"/> UCSB   |                               |

SIGNATURE OF UNIVERSITY REPRESENTATIVE

TITLE

DATE

ADDRESS OF UNIVERSITY REPRESENTATIVE (Campus department and mailing address)

EMAIL ADDRESS

UBEN 154 can be downloaded from UCNet

<https://ucnet.universityofcalifornia.edu/tools-and-services/administrators/docs/uben-154.pdf>

Completed UBEN 154 is submitted to Lincoln Financial Group in Dover, NH per Location's internal process

- Secure email (preferred): [shauna.smith@lfg.com](mailto:shauna.smith@lfg.com)
- Snail mail: 100 Liberty Way MS 01G-Attn: Shauna Smith

After submitting the UBEN 154, the Location submits Qualifying Leave of Absence in UCPath using the Extended Absence module

- Future dated leaves of absence can be entered/submitted through Extended Absence

Administer Extended Absence

Personalize | Find

Extended Absence Details

JED Additional Earnings Codes

Workers' Compensation

Sabbatical

Pay Period Dates for AY Academics

Job Overrides

Attachments

Transaction Number	Empl ID	Name	* Start Date	* Expected Return Date	Actual Return Date	Leave	FMLA/CFRA/PDLL Leave	Absence Reason	Action	Action Reason	Workflow Status	Date Submitted	Notes
1 260	10		07/01/2019	07/01/2020		Professional Development		Unpaid-Block	LOA	EDU	Approved	04/02/2019	Notes

- Lincoln Financial Group/Shauga Smith will send acknowledgement of receipt of the UBEN 154 and payment in full to both the claimant and UCPath Center within 5 days of receipt
  - Email sent to UCPath Center via [ucpath@universityofcalifornia.edu](mailto:ucpath@universityofcalifornia.edu) will automatically create a inquiry/case
- UCPath Production Benefits team receives case and processes request
  - Disability plans/coverage remain active in Base Benefits through the duration of the Qualifying Leave of Absence

- Employee notifies Location that they have returned from leave
- Location Updates the Extended Absence transaction with the Actual Return Date

Administer Extended Absence

Personalize | Find | View All | First 1 of 1 Last

Extended Absence Details		JED Additional Earnings Codes		Workers' Compensation	Sabbatical	Pay Period Dates for AY Academics		Job Overrides	Attachments									
Transaction Number	Empl ID	Name	* Start Date	* Expected Return Date	Actual Return Date	Leave	FMLA/CFRA/PDLL Leave	Absence Reason	Action	Action Reason	Workflow Status	Date Submitted	Notes	Edit	Approve	PushBack	Deny	Cancel
12	10	J	01/01/2019	01/01/2020		Professional Development		Unpaid-Block	LOA	EDU	Approved	03/01/2019	Notes	Edit	Approve	PushBack	Deny	Cancel

- UCPath's WorkForce Administration team updates Job Data with return to work information