Benefits Billing/Return from Leave Overview
OVERVIEW
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Absence Management (AM)</td>
<td>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.</td>
</tr>
<tr>
<td>Absence Takes</td>
<td>The number of units (hours) an employee takes in association with an absence.</td>
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<tr>
<td>Approval Workflow Engine (AWE)</td>
<td>A component of UCPath that is used to approve transactions, etc.</td>
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<tr>
<td>Benefits Billing (BB)</td>
<td>The process in which an employee is able to pay for premiums of eligible benefits through direct billing.</td>
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<tr>
<td>Employee Rate</td>
<td>The employee portion of the cost for benefits he/she is enrolled in.</td>
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<tr>
<td>Extended Absence (EA) Request</td>
<td>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</td>
</tr>
<tr>
<td>Job Data</td>
<td>Module in which employee’s job records are stored.</td>
</tr>
<tr>
<td>Leave with Pay</td>
<td>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.</td>
</tr>
<tr>
<td>Leave without Pay</td>
<td>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.</td>
</tr>
<tr>
<td>Return from Leave (RFL)</td>
<td>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.</td>
</tr>
<tr>
<td>Short Work Break (SWB)</td>
<td>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.</td>
</tr>
<tr>
<td>Total Cost</td>
<td>The sum of the employee and employer costs for benefits the employee is enrolled in.</td>
</tr>
</tbody>
</table>
The benefits billing process begins once an 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.
Process Overview

- 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:

<table>
<thead>
<tr>
<th><strong>Employee</strong></th>
<th><strong>Location</strong></th>
<th><strong>UCPath Center</strong></th>
</tr>
</thead>
</table>
| - Completes Benefits Billing Election Form and submits to UCPath Center.  
- Submits monthly billing payments. | - 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. | - 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)**

1. **Employee**
   - Identifies need for leave
   - Contacts Leave Administrator

2. **Location**
   - Provides employee with Benefits Billing Election Form, Plan Cost Summary and Leave of Absence documentation
   - Submits Extended Absence Request on UCPath Portal

3. **UCPC**
   - Receives and reviews request for processing
   - Inputs Correct?
     - Yes: Update Job Data and processes request
     - No: Deny request and notify Location though case

4. **Vendor**
   - Receives disability claim from employee
   - Requests UC Statement from UCP via case management (Salesforce)
   - Completes UC Statement and submits to vendor

5. **UCPC**
   - Automatically enroll employee (nightly batch job) in Benefits Billing
   - Generates Benefits Billing Statements
   - Mail Benefits Billing Statements

**QUESTIONS? 855.982.7284 UCPATH.UNIVERSITYOFCALIFORNIA.EDU UCPATH CENTER**
Process for employees placed on Short Work Break – Pay Path

STANDARD PROCESS (HAPPY PATH)

**Employee**
1) Identifies need for Short Work Break
2) Contacts Leave Administrator
3) If employee is eligible to continue benefits, provides employee with Benefits Election Form, Plan Cost Summary
4) Submits Short Work Break via Pay Path
3a) Reviews/sends Benefits Billing Election Form

**Location**

**UCPC**
4) Run Short Work Break Compliance Report
5) Pay Path transaction writes into Job Data
6) Automatically enroll employee (nightly batch job) in Benefits Billing
7) Generate Benefits Billing Statement
8) Mail Benefits Billing Statements
9) Process Benefits Election Form

Next page – Employee makes payments
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
Benefits Billing Election Form
Location provides form and cost summary to the employee

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.

Employees can update their address for the leave only.
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.
• 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 [redacted]. Please complete the Earnings And Last Date Worked Confirmation Statement, and submit directly to the Claims Examiner, Felicia [redacted], at [redacted]. Please copy 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> 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.
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.
• 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
• 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.
Location Follows internal process for Health Contingency Fund (Approval)

1. Location submits WC HCF LOA transaction via Extended Absence page and selects the Contingency Fund Flag.

2. Workforce Administration (WFA) updates Job Data to reflect Action / Reason (Leave of Absence / Workers Comp Health).

3. Action / Reason determines Benefit Premium (Plan type 10 – Medical is inactivated from Billing).

Once Location approves Health Contingency Fund for Employee

1. UCPath determines if there is a refund owed to employee depending on effective date of HCF.

2. UCPath’s Finance team will run their internal process to initiate reimbursement to PATH out of the HCF account (UCPath pays the premiums and as such should be reimbursed for them).
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.
Once Location removes Health Contingency Fund for Employee

1. UCPath activates/enrolls Medical in billing.

2. UCPath determines if there are premium catch-ups to be collected.

3. Employee starts being billed for Medical premiums along with any other benefits enrolled in billing.

Location Follows internal process for Health Contingency Fund

1. Location submits transaction via Extended Absence page with new WC LOA leave without the Contingency Fund Flag checked.

2. Workforce Administration (WFA) updates Job Data to reflect Action / Reason (Leave of Absence / Workers Comp).

3. Action / Reason determines Benefit Premium (Plan type 10 – Medical is Activated in Billing.)

Once HCF Exhausts

Once Location removes Health Contingency Fund for Employee

1. UCPath activates/enrolls Medical in billing.

2. UCPath determines if there are premium catch-ups to be collected.

3. Employee starts being billed for Medical premiums along with any other benefits enrolled in billing.
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.
# Process Overview

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

<table>
<thead>
<tr>
<th>Employee</th>
<th>Location</th>
<th>UCPath Center</th>
</tr>
</thead>
</table>
| • 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 | • Leave Administrator updates Extended Absence Request to reflect actual return to work date in UCPath on behalf of the employee. | • 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

**Flowchart:**
- If EE was on unpaid leave > 120 days?
  - Yes: Notifies EE via case management of re-enrollment options and sends RFL Reinstatement Form
  - No: Did EE return in a new plan year/waive plans during leave?
    - Yes: UCPath automatically reinstates VLTD/VSTD as applicable
    - No: Did EE waive any plans during leave?
      - Yes: Notifies EE of deductions/refunds and processes during next payroll on-cycle
      - No: Reconciles billing account/payroll deductions

**End**
• 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 Reinstall from LOA/SWB report daily to identify employees returning from a leave of absence.
The UCPath Center reviews the leave details and benefit reinstatement occurs as follows*:

- **Leave >= 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 repayment 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 31st 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.

<table>
<thead>
<tr>
<th>Employee ID # (8 Digits)</th>
<th>Last Name*</th>
<th>First Name*</th>
<th>M.I.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone Number (numbers only, no spaces)</td>
<td>Email Address</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Name* (Last, First, Middle Initial)</th>
<th>Birth Date*</th>
<th>Gender (MF)</th>
<th>Relationship Code*</th>
<th>Employee Tax* Dependant? (Yes/No)</th>
<th>Spouse/Dependent Partner Tax* Dependant? (Yes/No)</th>
<th>Social Security Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listed in Section 1:</td>
<td>Self</td>
<td></td>
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</tr>
</tbody>
</table>

*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 = Other Age Disabled Child

*Dependent eligibility requirements may be found in the "Eligible Family Members" section of the "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
**Return From Leave - FSA**

- 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

<table>
<thead>
<tr>
<th>Variable</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extended Absence Request to return employee from Unpaid LOA is submitted late</td>
<td>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. If employee remains on leave status, he or she will continue to receive Benefits Billing statements until the return information is updated.</td>
</tr>
<tr>
<td>Employee switches back and forth between Paid and Unpaid LOA</td>
<td>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.</td>
</tr>
<tr>
<td>Incorrect return from leave dates are entered and/or leave dates are adjusted</td>
<td>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.</td>
</tr>
<tr>
<td>Employee is eligible to reinstate plans and/or make election changes due to length of leave</td>
<td>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.</td>
</tr>
</tbody>
</table>
KEY TAKEAWAYS
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
<table>
<thead>
<tr>
<th>Scenario</th>
<th>Sender</th>
<th>Receiver</th>
<th>Method(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit request for leave (with pay, without pay, or sabbatical)</td>
<td>Employee / Location</td>
<td>Location / UCPath Center</td>
<td>Various / UCPath</td>
</tr>
<tr>
<td>Send additional information (as needed)</td>
<td>Location</td>
<td>UCPath Center</td>
<td>Case/Email response</td>
</tr>
<tr>
<td>Generate and send benefits billing statements</td>
<td>UCPath</td>
<td>Employee</td>
<td>Mail to home/mailing address</td>
</tr>
<tr>
<td>Submit payment for benefits</td>
<td>Employee</td>
<td>UCPath Center</td>
<td>Mail</td>
</tr>
<tr>
<td>Send notification of delinquency (as applicable)</td>
<td>UCPath Center</td>
<td>Employee</td>
<td>Mail</td>
</tr>
<tr>
<td>Send notification of de-enrollment (as applicable)</td>
<td>UCPath Center</td>
<td>Employee / Location</td>
<td>Case email</td>
</tr>
<tr>
<td>Send election packet and custom benefits forms (as applicable)</td>
<td>UCPath Center</td>
<td>Employee</td>
<td>Mail</td>
</tr>
<tr>
<td>Submit direct billing election form</td>
<td>Employee</td>
<td>UCPath Center</td>
<td>UCPath Inquiry</td>
</tr>
<tr>
<td>Submit Extended Absence request to return employee to active status</td>
<td>Location</td>
<td>UCPath Center</td>
<td>UCPath</td>
</tr>
<tr>
<td>Send notification of new benefits event</td>
<td>UCPath</td>
<td>Employee</td>
<td>Email</td>
</tr>
<tr>
<td>Send notification of enrollment eligibility for appropriate plans (as applicable)</td>
<td>UCPath Center</td>
<td>Employee</td>
<td>Case email</td>
</tr>
<tr>
<td>Submit Return from Leave Benefits form</td>
<td>Employee</td>
<td>UCPath Center</td>
<td>UCPath Inquiry / Mail / Fax</td>
</tr>
<tr>
<td>Submit benefit elections</td>
<td>Employee</td>
<td>UCPath Center</td>
<td>UCPath</td>
</tr>
</tbody>
</table>
Disability Rider Process
For UCPath Locations
Executive Summary

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.
Employee works with Location to start the process of a Professional Development leave of absence →

As part of Leave Counseling, the Location provides UBEN 154 to the employee per their local process →

Both Employee and Location complete their sections of the UBEN 154

The UBEN 154 is submitted securely to Lincoln Financial →

Location submits Qualifying Leave of Absence in Extended Absence →

Lincoln Financial notifies UCPath via inquiry/case

UCPath receives case and processes the request →

Disability plans/coverage remain active in Base Benefits through the duration of the Qualifying Leave of Absence →

Upon Employee’s return from Leave, the Location updates Extended Absence with the Actual Return Date.
Completing the UBEN 154

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

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

<table>
<thead>
<tr>
<th>TYPE OF QUALIFIED LEAVE (Attach PAF or other official documentation to this application)</th>
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<tbody>
<tr>
<td>APPROVED TIME PERIOD OF QUALIFIED LEAVE (From MM/DD/YY to MM/DD/YY)</td>
</tr>
<tr>
<td>PRE-LEAVE MONTHLY COVERED SALARY RATE</td>
</tr>
<tr>
<td>ACTUAL SALARY FOR THE LAST FULL MONTH BEFORE THE APPROVED, QUALIFIED LEAVE</td>
</tr>
</tbody>
</table>

Applicant is enrolled in the University’s VSTD, VLTD or both immediately before beginning of Qualified Leave  
Applicant is actively-at-work as of last full day worked before Qualified Leave  
Date of last full day worked  
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:

- ASUCLA
- UCB
- UCI
- UCLAMC
- UCR
- UCSF
- UCSC
- Hastings
- UCD
- UCIMC
- UCM
- UCSD
- UCSFMC
- ANR
- LBNL
- UCDMC
- UCLA
- UCOP
- UCSDMC
- UCSB

**SIGNATURE OF UNIVERSITY REPRESENTATIVE**

<table>
<thead>
<tr>
<th>TITLE</th>
<th>DATE</th>
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**ADDRESS OF UNIVERSITY REPRESENTATIVE (Campus department and mailing address)**

<table>
<thead>
<tr>
<th>EMAIL ADDRESS</th>
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UBEN 154 can be downloaded from UCNet

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

- Secure email (preferred): 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
• Lincoln Financial Group/Shauna 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

• UCPath’s WorkForce Administration team updates Job Data with return to work information