

SCOPE OF SERVICES REFERENCE GUIDE

UCPath Center Services

Affordable Care Act (ACA) Annual Benefits Eligibility Measurement Period (employee de-enrollment confirmation processing and general inquiries)

Benefit Changes Request Form Processing

Benefit enrollment data corrections (i.e., misspelled names, incorrect date of birth)

Benefits Eligibility and Termination Letter

Benefits Direct Billing Statement (Employee Benefit Payment Processing)

Benefits Proof of Coverage/Loss Coverage Notices

Benefits Provider Assistance (i.e., medical, dental, vision)

COBRA Election Requests

Death Claims

Disability Plan eligibility and enrollment

Employee Benefits Exception Requests

Employee Benefits Inquiry Assistance and Resolution

Employment Service Credit Inquiries

Expedited Coverage for benefits

Expedited Coverage for Postdoc benefits

Family Member Eligibility Verification De-Enrollment

Family Member Eligibility Verification Reinstatement

Flexible Spending/Dependent Care or Health Savings Account Questions

New Employee Benefits Orientation

Open Enrollment Exceptions

Postdoc benefit processing Forms

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Transitional Benefits Forms
Verification of Employment Inquiries
W2 and Copy of W2 Requests
Waiver of Premium process (Supplemental Life Insurance)

Central Benefits Office Services

Department Benefit Representative (DBR) Inquiries
Disability benefits claim escalation issues
Family Member Eligibility Verification (FMEV) - Disenrollment Outreach
Fidelity Investments Workshops Coordination
Health Care Facilitator Services
In Depth Explanation of Benefit Options Assistance with Challenges
Layoffs Employees Inquiring about Retirement Options
Limited to Full Benefits Eligibility Consultation
Medical, dental and vision claims
New Employee Benefits Orientation (NEBO) – In Person
New Employee Financial and Retirement Planning Orientation
Open Enrollment Events (Benefits Fair, Help Desk, Individual Consultations, Retiree Workshop)
Pre- Retirement Workshop Coordination
Pre-Retirement Employee Counseling
Prospective Applicant Benefits Consultation
Retiree Benefits Inquiries
Retiree Benefits Liaison

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Retiree Medicare Coordination
Retirement Reciprocity Coordination (i.e., CalPERS, CalSTRS)
Retirement Service Credit Inquiries
Social Security Benefit Processing and Questions
Title IX Services (Respondent Services Coordinator)
UCPath Center's escalated employee benefits cases
UCRAYS (UC Retirement At Your Service) Site Assistance
UCRP Disability Income Employee Consultations
UCRP Disability Income Process
Vendor Health and Welfare Workshops
Continuous enhancement of the UC benefits plans offered, provide campus communication and vendor educational meetings on plan functionality

Department Human Resources /Shared Services

Affordable Care Act (ACA) Annual Benefits Eligibility Measurement Period (review the annual reports for accuracy and provide feedback)
Inform of availability of COBRA, provide vendor contact information and COBRA rates to eligible employee/dependents
Employee paycheck discrepancies
Employment Issues/Challenges
Faculty, Staff, Student issue clarification
New Process Training/Assistance
Onboarding/Re-Appointment (enter on UCPath portal)/Offboarding (settlement agreements, terminations, retirement)
Provide New Employee Benefit Enrollment resources and information including referral to New Faculty and Staff website
Payroll Inquiries
Position Creation/Maintenance/Update/Termination

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Salary Cost Transfer processing

Service Link Requests for Updates

UCPath Center entries and payroll audit

Leave Administrator Services

Coordinate with the Disability Management Coordinator for reasonable accommodation requests

Disability Claims Initiation Process

Employee Benefits Election Form (cancellation of benefits for leaves or temporary layoffs while on leave)

Employee Benefits Reinstatement Form (reinstatement of benefits upon returning from leave)

Employee Leave and Layoff Benefits Consultation

Family Medical Leave (FMLA) Eligibility, Benefits and Process

Leaves (determine eligibility, provide required forms and counseling, status updates on UCPath, assist return to work (RTW))

WHO SHOULD I CONTACT? A quick reference guide for roles and responsibilities of UCPATH, Benefits Office, Shared Services

Below is a quick reference of department roles and areas of assistance complementing the responsibilities chart on the following pages:

UCPath Center:

- All issues/questions relating to employee health and welfare benefits
- Annual open enrollment administration, processing, exceptions
- Employee benefits enrollment system, enrollment, de-enrollment, changes, updates, exceptions
- New employee benefits orientation
- Benefits inquiry assistance, resolution
- Flexible spending/Dependent Care/Health Savings account assistance
- Provide proof of benefits eligibility, termination, updates
- Expedite benefits enrollment and coordination with benefit carriers (faculty, staff, postdocs)
- Family member eligibility verification processing (de-enrollment/reinstatement)
- Postdoc benefit enrollment processing
- Transitional benefit forms
- Benefit payment premiums (leave of absence)
- COBRA election requests
- Death claims process
- W2 processing, requests
- Waiver of life insurance premium processing
- Affordable Care Act annual measurement processing
- Verification of Employment Requests

Benefits Office:

- Assistance with escalated issues relating to benefit claims and health and welfare benefits
- Annual benefits fair
- Annual Open Enrollment employee assistance
- New Employee Benefits Orientation (NEBO) – In Person
- Benefits Eligibility
- Detailed explanation of benefit options
- Family Member Eligibility Verification
- At Your Service Online (AYSO) password reset
- Employee advocate and assistance with benefits providers (Health Care Facilitator)
- Employee layoff benefits counseling
- Title IX services
- Retirement planning workshops, benefit assistance (Fidelity, RASC, Medicare, Social Security) • Retirement disability consultations, assistance

Human Resources Department

- Assists employees with all aspects of employment - onboarding and off-boarding
- UCPATH/PeopleSoft entries
- Initial benefits orientation
- Payroll/paycheck questions
- Position and service credit questions
- Department and systems training
- First line of contact for employment issues/challenges

Leave Administrator

- Disability claims counseling, initiation, processing, status, update
- Employee leave counseling, management, eligibility, tracking, update

- FMLA benefits and processing
- Leave benefit election form processing
- Benefit continuation and premiums while on leave

Resources:

UCPath Center 855.982.7284 upcath@universityofcalifornia.edu
Benefits Office 951.827.5086, 951.827.2636 benefits@ucr.edu