

## Job Aid: Benefit Eligibility & Triggers

### Benefits Eligibility Process Overview

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)**

This job aid outlines the key fields necessary to determine if an employee is eligible for benefits and what benefits package they are eligible for.

- 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

### Job Data: Work Location Tab

- **Effective date of Job Data update**
  - Identifies the beginning of benefits eligibility
- **Action / Reason combination**
  - Different Action / Reason combinations can cause benefits to continue or terminate
  - Refer to the [Action / Reason Code Description Job Aid](#) and the [Action / Reason Codes Impacting Benefits Job Aid](#) to view the Action / Reasons and their impact on benefits
- **Job Indicator**
  - Identifies the employee's Primary Job or Secondary Job
    - The system looks across all active jobs on a daily basis to determine Primary / Secondary
    - When an employee has multiple active positions, typically the Academic job is set as the Primary job
    - If a Primary job end date has passed, the Primary job will not automatically be reassigned - an extension or termination will need to be processed in order for the Job Indicator to be re-evaluated
  - If the Primary Job is terminated and there is no other active job (at the end of the month) benefits are terminated
    - When the Primary Job is terminated, the system should automatically update the Secondary Job to be the Primary Job
    - If the Secondary Job is not eligible for benefits (e.g. Without Salary), benefits will be terminated
  - Job fields - FTE and Duration are added together for Primary and Secondary Jobs
    - FTE and Duration determine the benefit program the employee is eligible for

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- Duration is not a field visible in UCPath – it is a calculation determined by looking at the Effective Date of the Action and the Expected End Date of the job
- A job with no Expected End Date is considered indefinite
- Duration is re-evaluated daily, any time the Effective Date or Expected Job End Date is updated
  - Refer to the [Group Insurance Regulations – Administrative Supplements to Part II-A](#) Job Aid 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
- **Position Number**
  - The position number determines the Job Code and the corresponding Union Code (viewable under the Job Labor tab)
    - The Union Code determines the benefits program for represented employees
- **Location**
  - Each location has a zip code set up in the back end tables of UCPath (not visible in UCPath)
  - Both location zip code and home address zip code impact the HMO benefit plans available
    - PPO plans are not impacted by zip code
- **Expected Job End Date**
  - Job End Date impacts Duration – which impacts eligibility
  - Locations should work the R-103 Report: Jobs with Approaching End Dates to ensure End Dates are accurate
  - Benefits will not automatically terminate on / after the Expected Job End Date has passed. Benefits will only when the termination record is entered.
- **End Job Automatically Checkbox**
  - If selected, the employee's job automatically terminates as of the Expected Job End Date
    - The system automatically enters a termination row the night of the Expected Job End Date.
    - Benefits automatically terminate at the end of the month of the Job End date
      - For example, termination row effective date 6/1 will have benefits terminated on 5/31
      - For example, termination row effective date 6/2 will have benefits terminated 6/30
    - If an employee's job was automatically terminated and is subsequently updated and extended, a case needs to be submitted to reinstate benefits. Benefits will not automatically be reinstated.
  - If the End Job Automatically Checkbox is not selected, when the Expected Job End Date is in the past, benefit eligibility will be re-evaluated and updated as appropriate.

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- Example:
  - An employee has 2 jobs and the FTE and Duration of the 2 jobs makes the employee eligible for full benefits
  - Job 1 ends on 9/30 and when the benefits processes run on 10/1, the employee is re-evaluated for benefits eligibility
  - If the remaining job falls under the Group B eligibility criteria, the employee is only eligible for Core benefits
    - Vision, Dental, Supplemental Life and Dependent Life Insurance would terminate
    - Life Insurance would move from Basic Life to Core

The screenshot displays the UCPath interface for an employee's job information. The 'Job Information' tab is selected. Key fields are highlighted with red boxes:

- Effective Date:** 12/12/2018
- Effective Sequence:** 0
- HR Status:** Active
- Payroll Status:** Active
- Action:** Position Change
- Reason:** Position Only Change
- Job Indicator:** Primary Job
- Position Number:** 40122609
- Position Entry Date:** 10/01/2018
- Regulatory Region:** USA
- Company:** UCS
- Business Unit:** SBCMP
- Department:** COMS
- Department Entry Date:** 10/01/2018
- Location:** ENGT-101
- Establishment ID:** UCSB
- Last Start Date:** 10/01/2018
- Expected Job End Date:** 12/31/2018
- End Job Automatically:**

Other visible information includes: Empl ID, Empl Record 0, Position Name: TEACHG ASST-GSHIP, and Date Created: 12/17/2018.

### Job Data: Job Information Tab

- **HR Status**
  - Inactive jobs are not eligible for benefits
  - Active jobs are evaluated for benefit eligibility
- **Payroll Status:** Only some Status' are evaluated for benefit eligibility
  - Active (A) – evaluated for benefit eligibility

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- 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 [Short Work Break Matrix](#) 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.
  - The Empl class determines Group A or Group B for ACA and eligibility purposes as noted under Initial Eligibility on the [Group Insurance Regulations – Administrative Supplements to Part II-A](#) Job Aid
    - Note: “Code” on the job aid refers to Empl Class
- **FTE (Full Time Equivalent)**
  - FTE of 1.0 equals 40 hours
    - It is not uncommon to have FTE > 1.0 because the FTE for all active jobs are added together
  - FTE determines initial benefits eligibility
    - Once the employee meets initial eligibility – ongoing eligibility is based on the annual Standard Measurement Period (SMP) process
    - Refer to the [Group Insurance Regulations – Administrative Supplements to Part II-A](#) Job Aid for additional details

## Job Aid: Benefit Eligibility &amp; Triggers

| Job Information ?   |                | Find  | First                         | 4 of 11      | Last |
|---|----------------|---|-------------------------------|--------------|------|
| Effective Date  | 12/12/2018     | Go To Row                                     |                               |              |      |
| Effective Sequence  | 0              | Action  | Position Change               |              |      |
| HR Status   | Active         | Reason  | Position Only Change          |              |      |
| Payroll Status  | Active         | Job Indicator                                 | Primary Job                   |              |      |
|   |                | History                                       |                               |              |      |
| Job Code  | 002310         | TEACHG ASST-GSHIP                             |                               |              |      |
| Entry Date  | 10/01/2018     |   |                               |              |      |
| Supervisor Level  |                |   |                               |              |      |
| Supervisor ID   |                |   |                               |              |      |
| Reports To  | 40035741       | PROF-AY-B/E/E                                 | 10038450                      | Matthew Turk |      |
| Regular/Temporary   | Not Applicable | Full/Part                                     | System Default - Select Value |              |      |
| Empl Class  | Ac Student     | Officer Code                                  | None                          |              |      |
| Regular Shift   | Not Applicable | Shift Rate                                    |                               |              |      |
| Classified Ind  | Academic       | Shift Factor                                  |                               |              |      |
| Standard Hours ?  |                |   |                               |              |      |
| Standard Hours  | 20.00          | Work Period                                   | W                             | Weekly       |      |
| FTE   | 0.500000       |   |                               |              |      |
| <input checked="" type="checkbox"/> Adds to FTE Actual Count? |                | <input type="checkbox"/> Encumbrance Override |                               |              |      |

## 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 Aid: Benefit Eligibility & Triggers

**Payroll for North America** ?

|                                     |                              |                              |      |
|-------------------------------------|------------------------------|------------------------------|------|
| <b>Pay Group</b> 8AC                | UCSB Academic Exempt Monthly |                              |      |
| <b>Employee Type</b> S              | Salaried                     | <b>Holiday Schedule</b> NONE | None |
| <b>Tax Location Code</b> CA-DEFAULT | California                   |                              |      |
| <b>GL Pay Type</b>                  |                              | <b>FICA Status</b> Exempt    |      |
| <b>Combination Code</b>             |                              | Edit ChartFields             |      |

### Job Data: Salary Plan Tab

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

**Salary Plan** ? Find First 4 of 11 Last

Effective Date 12/12/2018 Go To Row

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Position Change

Reason Position Only Change

Job Indicator Primary Job

---

**Salary Admin Plan** T018 Academic Student Titles- AY

Grade I Teaching Assistant- AY

Step 1 UC Step 1.0

Grade Entry Date 10/01/2018

Step Entry Date 10/01/2018

Includes Wage Progression Rule

History

### 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
- **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.

## Job Aid: Benefit Eligibility & Triggers

| Job Information               |                               |
|-------------------------------|-------------------------------|
| Business Unit                 | SBCMP UC Santa Barbara Campus |
| Job Code                      | 002310 TEACHG ASST-GSHIP      |
| Reg/Temp                      | Not Applicable                |
| Regular Shift                 | Not Applicable                |
| Title                         | TEACHG ASST-GSHIP             |
| Full/Part Time                | System Default - Select Value |
| Union Code                    | BX Academic Student Employees |
| Short Title                   | TEACHG ASS                    |
| Detailed Position Description |                               |

| Employee Relations Code |                            | Find   View All     | First   | 1 of 1 | Last |
|-------------------------|----------------------------|---------------------|---------|--------|------|
| Effective Date          | 09/06/2019                 | Status              | Active  |        |      |
| HR Worksite ID          | 91                         | BFS                 |         |        |      |
| Employee Relations Code | Stud Academic Title, HEERA | Representation Code | Covered |        |      |
| Incentive Award Plan    |                            |                     |         |        |      |

### Affordable Care Act (ACA) Eligibility Status

- ACA hours are calculated annually – the report is delivered in November and changes are effective 1/1
- Employees benefit package will be updated automatically on 1/1
- Locations should review the report of ineligible employee and notify UCPath of any discrepancies
- If the report is incorrect and hours need to be updated – the location should submit the correct hours.
- BYH hours need to be submitted with payroll. Refer to the [BYH Job Aid](#) for more details.

### Benefit Eligibility Configuration Fields

- Benefits Administration Eligibility Fields are populated automatically after the system evaluates all of the employee data listed above 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 [Benefits Administration \(Ben Admin\) Eligibility Configuration Fields Job Aid](#)

## Job Aid: Benefit Eligibility & Triggers

- Health and Welfare requirements for benefit eligibility are outlined in the [Group Insurance Regulations – Administrative Supplements to Part II-A](#)

|                             |                 |                       |                                |
|-----------------------------|-----------------|-----------------------|--------------------------------|
| Last Date Worked 12/30/2018 |                 |                       |                                |
| Job Data                    | Employment Data | Earnings Distribution | Benefits Program Participation |

| Benefits Administration Eligibility ? |     |                 |   |            |   |
|---------------------------------------|-----|-----------------|---|------------|---|
| BAS Group ID                          | M19 | Monthly OE 2019 |   |            |   |
| Elig Fld 1                            | N   | Elig Fld 2      | N | Elig Fld 3 |   |
| Elig Fld 4                            |     | Elig Fld 5      | C | Elig Fld 6 |   |
| Elig Fld 7                            |     | Elig Fld 8      |   | Elig Fld 9 | N |

### Modify a Person

- **Birth Date:** Is required to process benefit events
  - If no birth date is populated, benefits will error out and the employee will not be paid
  - Locations should work the R-130 Report - Ability for locations to monitor missing personal data to identify employees missing a Birth Date
- **Social Security Number (SSN):** 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 receive Evidence of Insurance (EOI) paperwork
    - 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 would have to be submitted to correct and consolidate the accounts
- Future dated hires do not require a Birth Date or SSN but both should be added on the first day of work



## Job Aid: Benefit Eligibility & Triggers

Biographical Details | Contact Information | Regional | UC Personal Data

**Clara Evangelista** Person ID [REDACTED]

Name Find | View All First 1 of 1 Last

Effective Date 02/09/2015 + -

Format Type English

Display Name Clara Evangelista View Name

**Biographic Information**

Date of Birth 01/01/1974 [i] Years 46 Months 8

Date of Death [i]

Birth Country [Q]

Birth Location [ ]  Waive Data Protection

**Biographical History** Find | View All First 1 of 1 Last

\*Effective Date 02/09/2015 + -

\*Highest Education Level G-Bachelor's Level Degree

\*Marital Status Not Used at UC As of [i]

Language Code [v]

Alternate ID [ ]  Full-Time Student

**National ID** Personalize | Find | View All [i] [ ] First 1 of 1 Last

| *Country | *National ID Type          | National ID | Primary ID                              |
|----------|----------------------------|-------------|---|
| USA [Q]  | Social Security Number [v] | XXX-XX-4291 | <input checked="" type="checkbox"/> + - |

### Current Benefits Summary Page

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

## Job Aid: Benefit Eligibility & Triggers

[New Window](#) | [Help](#)

Benefit Enrollment Summary
Benefit Deduction Summary

Employee ID [REDACTED]
Benefit Record Number 0

Primary Empl Record 0

**Benefits System** Benefits Administration

**Benefit Program** NRB Non Represented Biweekly

**Benefits Status** Active

Print Summary and Election Form

Benefits As of  Refresh

| Current Enrollments |                   |              |             |                           |                |                       |                    |
|---------------------|-------------------|--------------|-------------|---------------------------|----------------|-----------------------|--------------------|
| Plan Type           | Coverage Election | Benefit Plan | Description | Coverage or Participation | Coverage Begin | Employee Monthly Cost | Total Monthly Cost |
| Medical             | Elect             | KSCA         | KAISER SO   | Self + Child(ren) (N)     | 01/01/2018     | 110.07                | 1105.96            |
| Dental              | Elect             | DUSA         | DENT HMO    | Self + Child(ren) (N)     | 10/30/2017     |                       | 30.93              |
| Vision              | Elect             | VSP          | VSP         | Self + Child(ren) (N)     | 10/30/2017     |                       | 12.11              |
| Legal Insurance     | Elect             | ARAG         | ARAG        | Self + Child(ren) (N)     | 10/30/2017     | 14.95                 | 14.95              |
| Behavioral Health   | Elect             | OPTKP        | BH-OPTKP    | Self + Child(ren) (N)     | 01/01/2018     |                       |                    |

### Benefits Administration Process in UCPath

- Events are processed in the sequence they have been entered
- When changes are made to any of the fields above, the Benefit Administration Process evaluates and automatically updates benefit eligibility
  - e.g. 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

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

## Job Aid: Benefit Eligibility & Triggers

- 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
  - Example: 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 outlined above
- ACA Eligibility Status is incorrect (only applicable to locations that converted in 2020)

### Timing of Benefits Reinstatement:

- Benefits reinstatements can take up to 1 month to go into effect due to the timing of when the files are sent to the vendors
- When there is an immediate need for services and benefits reinstatement needs to be expedited, call (855) 982-7284 to make the request with an Employee Services associate or submit a case indicating the need for "Expedited Benefits."
  - UCPath can expedite coverage by manually notifying the appropriate vendors (takes 1-3 days depending on the vendor)
    - Employee Services can only expedite reinstatement when benefits show "Enrolled" on the Benefits Summary; if benefits show "Waived," the case will need to be worked by the benefits team

### 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 an 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