



**DBR Training—Managing the BELI**

**UCSF HR/Benefits**

**October 2007**

# Managing the BELI

## *Benefits Eligibility Level Indicator*

- Assigned BELI vs Derived BELI
  - Accountability & Maintaining BELI Compliance
  - Initial Eligibility
  - BELI Characteristics
  - Continuing Eligibility
  - Loss of Eligibility
  - Leaves, Separations, Rehires, the Benefits Bucket
  - Rehired UC Retirees & Medicare
  - Residents, Clinical Fellows, & Postdocs
  - Questions 'n' Answers—BELI Scenarios
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# Managing the BELI

## *Benefits Eligibility Level Indicator*



- UCSF HR/Benefits Webiste
  - Department Benefits Representatives Menu
    - [BELI Reference Material](#)

# Managing the BELI

## *Assigned vs Derived*

- Assigned BELI

- Assigned by department based upon initial eligibility criteria
- You are accountable
- Re-assigned based upon change in appointment status that confers greater level of eligibility or,
- Re-assigned to “5” upon loss of eligibility
  - Avg Hr/Wk: <17.5 for two consecutive months)
- The Assigned BELI governs eligibility

# Managing the BELI

## *Assigned vs Derived*

- Derived BELI
  - OLPPS derivation based upon data entered by dept
  - Helps maintain compliance with Assigned BELI
  - Does not govern eligibility
  - OLPPS screens
    - IINS
    - IGEN
    - EPER
- Monthly Compliance Reports

# Benefits Eligibility Level Indicator

## *Initial Eligibility Criteria*

- **Initial Eligibility**

- Determined by the nature of the appointment
  - Percent of appointment
  - Duration of appointment
  - Appointment Type
  - Title code
- Subsequent change to the appointment which provides a greater level of benefits eligibility (e.g., extension of appointment, or an increase to percent time requiring a change of Assigned BELI, e.g., from “3” to “1”)
- 1000-hour rule
- Multiple Appointments

# Benefits Eligibility Level Indicator

## *Appointment Types*

1. Contract
2. Regular/Career
3. Limited
4. Casual/Restricted (not eligible)
5. Academic
6. Per Diem (not eligible)
7. Partial Year/Career
8. Floater (not eligible for Full Benefits/UCRP)

# Benefits Eligibility Level Indicator

## *Initial Eligibility Criteria*

- **BELI 1: Full Benefits/UCRP Membership**

- Appointment Type is eligible
  - not Per Diem, Floater, “Visiting” title, etc
- Appointment of 50% or more with a duration of one year or longer
  - Appointment Duration code if appropriate (“B”, or “V”)
- Limited appointee attains 1000-hours during a rolling 12-month period
- Upon re-appointment if 12-month rolling bucket  $\geq$  1000 hrs
- Multiple Limited/cumulative Appointments
- Consecutive Appointments

# Benefits Eligibility Level Indicator

## *Initial Eligibility Criteria*

- Mid-level Benefits BELI 2:
  - Appointment of 50% or more with a duration of one year or longer, and
  - Excluded from UCRP
    - “Visiting” Titles
    - Floaters
    - Rehired Retirees who have “accepted” the waiver
- Mid-level Benefits BELI 3:
  - 100% for at least 3 months, but less than 12 months
  - Multiple Appointments

# Benefits Eligibility Level Indicator

## *Initial Eligibility Criteria*

- BELI 4: CORE Benefits
  - Appointment of at least 43.75% and does not satisfy any of the criteria for BELI 1, 2, or 3

# Benefits Eligibility Level Indicator

## *Initial Eligibility Criteria*



- **BELI 5: No Benefits Eligibility**
  - In Compliance with Derived BELI:
    - 5, does not meet criteria for 1 – 4
    - 6, Casual Restricted (student titles)
    - 7, Per Diem
    - 8, By Agreement
    - 9, Without Salary (WOS) appointments

# Benefits Eligibility Level Indicator

## *Initial Eligibility Criteria*



- BELI P: PSBP
  - Employee record reflects at least one appointment in a postdoctoral scholar title with a duration of at least twelve months at 50 percent or more or at least three months at 100%.

# Benefits Eligibility Level Indicator

## *Continuing Eligibility Criteria*

- **Continuing Eligibility**

- Not affected by changes to the nature of the appointment provided there is no break in service (e.g., reduction of percent time to a level lower than that of initial eligibility) and appointment type remains eligible
- Once enrolled in any benefits package (Full, Mid-level, or Core), continuing eligibility is maintained (BELI remains unchanged) until the average hours worked per week during a rolling 12-month period, drops to below 17.5 for two consecutive months
- Applies only to medical, dental, vision, Basic Life, Short-term Disability and Supplemental Disability. All other benefits continue as long as appointment type remains “eligible” and there are sufficient earnings to cover deductions.
- see “Avg Hr/Wk:” OLPPS/IHRS



PPIHRS0-I0930

02/18/04 12:45:57

02/13/04 19:52:51

Userid: SFBENAT

ID: Name:

Hm Dept: 173939 HUI

Pay: M0

Average hours per week during a 12-month rolling period

Hours on Pay Status

Jan: 176.00  
 \* Feb: 160.00  
 Mar: 168.00  
 Apr: 176.00  
 May: 176.00  
 Jun: 168.00

Sep:  
 Oct: 184.00  
 Nov: 160.00  
 Dec: 184.00

YTD Tot Hrs : 360.00  
 YTD Reg Hrs : 336.00  
 YTD OT Hrs : .00  
 YTD NonWk Hrs: 24.00  
 Avg Hr/Wk : 40.00

Lv Accr Hrs:

Balance

Maximum

Vacation

384.00

Sick Leave

Compensatory

.00

Paid Time Off

.000000

Prior Service Mths : 0  
 Empl Service Credit:  
 From Date :

Next Func:

ID:

Name:

SSN:

Don't forget the "HELP" function (the F1 key)

===>

F: 1-Help 2-Browse 3-PrevMenu 4-Print

F: 9-MainMenu 12-Exit

20/13

NUM

12:45:25 IBM-3278-2

ATTN	Clear	Erase EOF	Erase Input	Home	Enter	New Line	Tab	PA1	PA2	PA3	Reset
PF1	PF2	PF3	PF4	PF5	PF6	PF7	PF8	PF9	PF10	PF11	PF12

# Benefits Eligibility Level Indicator

## *Loss of Eligibility & COBRA*

- Eligibility ends on the last day of the second consecutive month below 17.5
- Re-assign BELI to “5”
- BELI Effective Date:
  - = Last calendar day of second month
- Coverage End Date:
  - = Last calendar day of second month
- COBRA Qualifying Event Date:
  - = First calendar day of the first month below 17.5

# Managing the BELI

## *Benefits Hours vs. Career Hours*

- Hours worked in Limited Appointments count toward UCRP/Full Benefits eligibility and Career Status
- Think of it as two different “buckets” where hours are monitored
- Be aware of the differences. . .



## UCRP/Full Benefits

- ✓ Counts limited and career hours worked in a rolling 12-month period
- ✓ Not affected by break-in-service
- ✓ Upon reaching 1000 hours, Full Benefits eligibility (BELI 1) and UCRP Membership/FICA (U/E) is automatically derived effective the first of the following month.
- ✓ Excludes hours for Per Diems, Floaters and rehired retirees who have “accepted” the waiver.
- ✓ Hours carry over from dept to dept and from UC location to location.



## Career Employment Status

- ✓ Counts only limited hours worked in a rolling 12-month period
- ✓ Break-in-service of 120-days or longer will empty the bucket
- ✓ Upon reaching 1000 hours, OLPPS Preparer must “end” Limited appointment and “add” Career appointment effective the first of the following month.
- ✓ Excludes hours for Per Diems, Floaters
- ✓ Includes hours for all rehired retirees
- ✓ Hours carry over from dept to dept (only), not location to location.

**both buckets appear on OLPPS/IHR2**



PPIHR20-I1338

EDB Inquiry

06/07/04

1:47:31

06/07/04 19:52:51

Toward Eligibility

user10: SFBENAT

ID 123456789

Name: Doe,John

SSN: 987654321

Hm Dept: 173939 HUMAN RESR

Emplmt Status: A Pri Pay: MO

Hours Toward Benefits Eligibility

Total Hrs at Month Begin: 1224.00

Current Month: .00

Jan:	.00	Jul:	184.00
Feb:	.00	Aug:	168.00
Mar:	.00	Sep:	176.00
Apr:	.00	Oct:	184.00
May:	.00	Nov:	160.00
* Jun:	168.00	Dec:	184.00

Hours Toward Career Status Eligibility

Total Hrs at Month Begin: .00

Current Month: .00

Jan:	.00	Jul:	.00
Feb:	.00	Aug:	.00
Mar:	.00	Sep:	.00
Apr:	.00	Oct:	.00
May:	.00	Nov:	.00
* Jun:	.00	Dec:	.00

As of Date for Counting Hours: 06/01/04

Next Func:

ID:

Name:

SSN:

===>

F: 1-Help 2-Browse 3-PrevMenu 4-Print

F: 9-MainMenu 12-Exit

20/13

NUM

12:03:21 IBM-3278-2

ATTN Clear Erase EOF Erase Input Home Enter New Line Tab PA1 PA2 PA3 Reset

PF1 PF2 PF3 PF4 PF5 PF6 PF7 PF8 PF9 PF10 PF11 PF12

# Managing the BELI

## Separations/Rehires and the BELI

- **Separation Bundle (SEPR)**

- No need to re-assign BELI
- Creates reliable paper trail/history
- Automatically generates health coverage end-dates
- Transmits requisite data/facilitates UCRS distributions
- Emeritus (99/99/99) titles can be added
- WOS (with end-date) can be added (or left in place)
  - Remove separation following monthly maintenance/no risk of dropping off

- **Re-Hire Bundle (RHIR) (RHNC)**

- Re-assign appropriate BELI
- Rehired Retiree Appointment: rehire date must be at least 30 days following separation (don't forget waiver)—BELI 5, 4, 3, or 2
- Confirm that correct retirement/FICA coding is in place

# Managing the BELI

## *Rehire to Limited Appointment*

### *During Preferential Re-employment Period*

- Health & Welfare
  - If, upon rehire, the Benefits Bucket is still  $\geq 1000$ -hours
    - Initial eligibility = Assign BELI 1, Full Benefits
      - then, follow “continuing eligibility” (17.5) rule
  - If, upon rehire, the Benefits Bucket is  $< 1000$ -hours
    - Assign BELI based upon nature of the appointment
- Retirement/FICA
  - UCRP/FICA same as prior to layoff (as if no break)
    - Once a UCRP Member, always a Member...

# Managing the BELI

## *Leave Without Pay (LWOP)*

- Proper coding for an approved leave without pay:
  - Protects/maintains current eligibility status
  - Provides auto-notification for 4-month leave provision regarding Basic Life Conversion
  - Generates requisite documentation for purposes of establishing UCRP service credit not accrued during a leave without pay (BuyBack)
  - Enables Payroll to process accurate leave information
  - Allows personal premium payments to Payroll Insurance Desk
- LEAV Bundle
  - Code “LOA Begin/Return/Type”, “With” / “Without”, etc.
  - Do not re-assign BELI
- SAW/RTW (BELI Status Qualifier code = 40)

# Managing the BELI

## *Rehiring a UC Retiree*

- Re-tir-ee \ri-tī-rē\ *n* : a person who has retired from his/her occupation (and receives UCRP monthly retirement income (MRI))
- Not applicable when UCRP Lump Sum Cashout elected
- A UC Retiree can be rehired in a limited appointment under the following conditions:
  - Must have a 30-day break-in-service from separation, and
  - Must have received first Monthly Retirement Income check
  - Must complete *UCRP Waiver and Release*
    - “Accept” = waive future UCRP benefits accrual (excluded from 1000-hour benefits rule)
    - “Decline” = if/when 1000-hour rule has been met, Retired status ends-- Active UCRP status/Full Benefits resumes
    - Submit waiver form to Benefits/Box 0918 a.s.a.p.
- Be aware of Medicare Secondary Payer Law
- [Go to Exchange for details](#), guidelines, waiver form, etc.

# Managing the BELI

## *Residents & Postdocs*

- Residents/Clinical Fellows
  - Title Codes: 2708, 2724, 2726, 2735, 2732
    - Assigned BELI Code should be “5”
- Postdoctoral Scholars
  - Title Codes: 3252, 3253, 3254
    - Assigned BELI Code should be “P”

# *BELI EXERCISE #1*

- Melvin has an appointment at 100% time for 6 months (1/1/02 – 6/30/02). The Limited appointment is eligible for Mid-level benefits (not UCRP). During this time, Melvin works 40 hours per week. On 7/1/02, his department notices that he reached 1,000 hours in June and decides to extend his appointment until 12/31/02 but cut him back to 49% time.
- Questions:
  1. What is Melvin's BELI on 1/1/02?
  2. Will Melvin's BELI change in the future? When?
  3. Is policy being followed in this scenario?

## *BELI EXERCISE #2*

- Carla is hired at 100% from 3/1/04 until 5/31/04. On 4/1/04 recruitment for the position ends, and Carla is the applicant chosen for the position, so her appointment is extended until 4/1/05.
- Questions:
  1. What BELI would be assigned 3/1/04?
  2. At what point would the BELI be re-assigned? To what?

## *BELI EXERCISE #3*

- Jim's 80% SRA appointment, which began on 3/1/04, is being funded by a grant which ends 8/31/04. This grant is renewed every Fall, and Jim's position is considered a permanent one.
- Question:
  1. What BELI would Jim's appointment receive on 3/1?  
On 9/1?
  2. What can the department do to make sure that this appointment will not end up with a derived BELI of 4?

# *BELI EXERCISE #4*

- Janelle is hired for a 6-month, 40% position starting 9/1/04. She mentions that on 7/31/04 she was laid off from a full time position that she held for three years in another department.
- Questions:
  1. What BELI would be assigned as of 9/1?
  2. Why?

# *BELI EXERCISE #5*

- Pierre held a 100% Clinical Nurse II position from 7/1/03 to 6/30/04. On 7/1/04, he went to a Per Diem RN position.
- Questions:
  1. What was his assigned BELI on 7/1/03?
  2. On 7/1/04? Why?
  3. What other appointment changes should be treated similarly?
  4. Give several reasons why he should be separated and rehired?

# Thank you!

... for taking the time to come and join us today.  
Check out the schedules for other workshops and  
presentations at our UCSF HR/Benefits Website.

[www.ucsfhr.ucsf.edu/benefits](http://www.ucsfhr.ucsf.edu/benefits)

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