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
Managing the BELI
Benefits Eligibility Level Indicator

- UCSF HR/Benefits Website
  - 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
**Average hours per week during a 12-month rolling period**

<table>
<thead>
<tr>
<th>Month</th>
<th>Hours</th>
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<tbody>
<tr>
<td>Jan</td>
<td>176.00</td>
</tr>
<tr>
<td>Feb</td>
<td>160.00</td>
</tr>
<tr>
<td>Mar</td>
<td>168.00</td>
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<tr>
<td>Apr</td>
<td>176.00</td>
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<td>May</td>
<td>176.00</td>
</tr>
<tr>
<td>Jun</td>
<td>168.00</td>
</tr>
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</table>

* Denotes month

**YTD Tot Hrs**: 360.00
**YTD Reg Hrs**: 336.00
**YTD OT Hrs**: 0.00
**YTD NonWk Hrs**: 24.00
**Avg Hr/Wk**: 40.00

**Lv Accr Hrs**: 384.00
**Empl Service Credit**: 0

**Don't forget the “HELP” function (the F1 key)**
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:
  \[= \text{Last calendar day of second month}\]
- Coverage End Date:
  \[= \text{Last calendar day of second month}\]
- COBRA Qualifying Event Date:
  \[= \text{First calendar day of the first month below 17.5}\]
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
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Total Hrs at Month Begin: 2080.00
Current Month: .00

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Total Hrs at Month Begin: .00
Current Month: .00

As of Date for Counting Hours: 01/01/01
Hours Toward Benefits Eligibility
Total Hrs at Month Begin: 1224.00
Current Month: .00

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

As of Date for Counting Hours: 06/01/04
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 ≥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-tɪ-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

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