

# HR/Benefits Review

Spring 2000

## Tidal Wave II

This article is reprinted from *The Berkeleyan*

### Higher education faces flood of students—

**UC and counterparts nationwide cope with rising enrollments, tighter space.**

Boom, tidal wave, surge. Whatever the terminology, educators are bracing for substantial college enrollments in the coming decade, not just in California but across most of the country.

The prospects are sending educators and policy-makers into overdrive as they wrestle with how to accommodate

more than 2 million new full-time students expected at public and private colleges and universities nationwide by 2010. Between 1995–96 and 2011–12 the number of high school graduates will increase 31 percent in the West, 10 percent in the North-Central region, 17 percent in the Northeast and 23 percent in the South.

At the January

20 UC Board of Regents meeting, the University of California provided the first glimpse of what the UC system

is facing. Regents were told that to meet growth demands through 2010 the system must plan—and secure state funding—for 63,000 students more than currently enrolled.

Beyond issues of physical space, facilities, faculty, staff and necessary services, the projections raise a major question about whether all eligible for college admission will find a seat in the classroom. Leaders holding the reins of public education must find ways to make way for the additional students, or degrade a key element in the American dream.

And the clock is ticking.

“There’s not a lot of time. The rubber is going to hit the highway pretty soon, and I just don’t think the states have really thought through what happens...” said Cheryl Blanco, director of policy and information for the Western Interstate Commission for Higher Education. California is one of the few already preparing, she said.

### Source of surge

Population growth alone is expected by the year 2015 to account for more than four million additional college students than educated nationwide in 1995, according to a report by the Commission on National Investment in Higher Education. Growth reflected by record elementary and secondary school enrollment in the United States in the 1990s is expected to continue surging in the coming decade.

American Demographics magazine reported in June that the population boom will not echo evenly everywhere.

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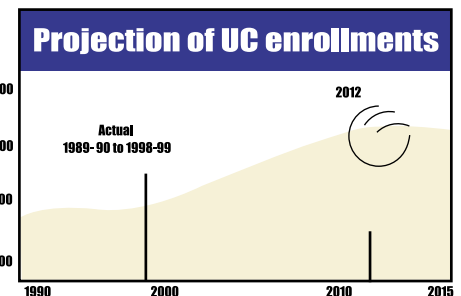
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Regional economies, varying fertility rates and inter-state migration are among the critical variables.

West Virginia, Kentucky and Indiana, for example, should feel the impact of declining or negligible birth rate changes. But out West, only Wyoming and North Dakota expect declining numbers of high school graduates. Meanwhile, California, Texas and Florida will experience the results of a disproportionately high percent of birth increases.



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# Tidal Wave II—Q&A

## Q: Where do these UC enrollment growth numbers come from?

A. The projected enrollment by the Office of the President was based on several factors and includes new freshmen, transfer students and a growth in graduate students.

The new freshman estimates come from projections by the Demographic Research Unit of the Department of Finance. They are based on the number of high school students graduating between now and 2010. UC plans to enroll at least the same proportion of California high school graduates in the future as it does now.

The estimate of transfer students is based on a systemwide memorandum of an understanding with community colleges that will increase community college transfers by 40 percent to 14,500 per year.

The graduate student enrollment reflects the number of graduate students UC faculty say is necessary to maintain the quality and character of the research university education and to continue to do research that significantly contributes to California's economy and quality of life.

## Q: Why is the rate of growth higher than expected?

A. The university had planned for growth, projecting an estimated 39,000 additional students through 2010. The current projection of 63,000 additional students systemwide reflects, among other factors, a turn around in the California economy that had triggered more than anticipated population growth and stronger demand for college participation.

## Q. How did UC decide how many students each campus should absorb?

A. The Office of the President determined that a proportional distribution of the additional enrollment growth based on each campus's long range development plan would be the most reasonable allocation. Already UC Riverside is expected to grow by 108 percent through 2010, and Irvine and San Diego also are planning for major growth of 76 percent and 64 percent respectively. It said that to ask a few of the campuses to accommodate all the growth would be unreasonable and could jeopardize the quality of the academic programs.

## Q. Are the numbers in the chart "How Each Campus May Grow" final?

A. None of the campus numbers are final, and there may be some changes made as campuses and local communities work through the public review process of new long range development plans. The Office of the President, however, believes the estimate of 63,000 additional students systemwide will remain firm.

## Q. How are the campuses to pay for the faculty who will teach these additional students and for the services and facilities they will need?

A. The Office of the President has said that funding for capital improvements and on-going operational costs are the responsibilities of the state as a whole.

Further, the study committee at Berkeley appointed by the chancellor stated one of its planning principles as: "The first call on the funding we receive for increased enrollment must be to cover the costs of instruction, including administrative overhead and student services."

## Q. What happens after 2010? Is more growth expected?

A. The current projections call for a leveling off of the rate of enrollment growth after 2010.

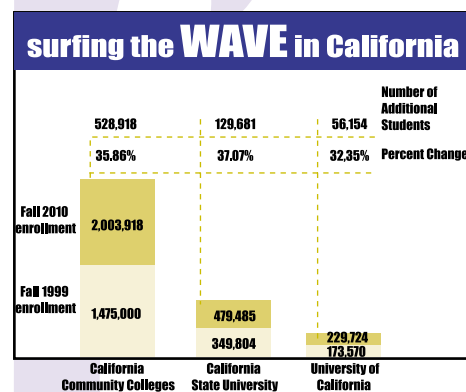
Charts in newsletter 1. Projection of UC Enrollments 2. Surfing the Wave in California 3. How Each Campus May Grow

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The Western Interstate Commission for Higher Education cites statistics indicating California, Arizona, Colorado, Washington and Nevada will see enrollment soar by 25 to 35 percent by 2008.

California's public colleges and universities face unprecedented student growth in the next 10 years with enrollment swelling by an estimated 700,000 new students.

UC systemwide faces an increased enrollment of almost 63,000 full-time students, or 43 percent. This equals the system's total enrollment growth over the preceding 30 years, and matches current enrollment at UC Berkeley and UCLA combined.



Enrollment is forecast to jump 36 percent at California community colleges and 37 percent at California State University campuses.

Sandra Smith, UC's assistant vice president for planning and analysis, said 39,000 of the new wave had been expected and is addressed in system expansion plans. UC already is developing its 10th general campus, UC Merced and Governor Gray Davis has asked that it open a year early, in 2004. It will enroll 5,000 students by 2010.

Meeting the challenge across the system will, of course, require a sustained commitment of resources. For instance, UC campus growth, along with needed renovation and seismic projects, will require \$500 million per year in capital funding. The university will need to hire approxi-

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# Work/Life-Dependent Care Program and Activities



As outlined in the November 1999 issue of this newsletter, the following is the first in a series to highlight the work/life programs and activities occurring throughout the University. Each article will focus on a specific topic under the work/life umbrella. This article provides a general overview of dependent care including child care and elder care.

The following statistics from research conducted by the Families and Work Institute are not surprising to UC employees. Many of you may see yourselves as the individuals who make up these statistics. As these statistics show, employees often find themselves stretched when they try to meet all their work and dependent care responsibilities. Consider the following:

- A full 46% of workers have children under 18 who live with them at least half-time.
- Nearly one in five employed parents is single and 27% of employed single parents are men.
- Some 78% of married employees have spouses who are also employed.
- On workdays, men spend 2.1 hours on household chores compared to the 2.9 hours women spend.
- Both men (1.6 hours per workday) and women (1.3 hours per workday) have little personal time.
- Between 1990 and 2010, the number of frail elders over age 85 will grow by 88%.

The University has been focusing on the issue of dependent care for a long time, with some of our child care facilities in operation since the mid-60's. Here's a brief look at what's happening at some locations in the area of dependent care. Similar programs may exist at your location as well. More information on local resources can be obtained from your location's website or the Work/Life contact list (see page 4).



**UC Berkeley.** The Chancellor's Advisory Committee on Dependent Care (CACDC) produced "A Guide for Balancing Work and Family" in 1997-98. This publication is available to all UCB faculty and staff and contains chapters on UC benefits and policies, flexible work arrangements, and choosing child and elder care. Also included are UCB resources and programs available to faculty and staff, such as childcare centers, the elder care counselor, and summer and holiday youth education and recreation programs. Some UC and private universities have purchased the guide and adapted it to their campuses. The guide will be updated this year and can be found on the CACDC website ([campus.chance.berkeley.edu/depicare](http://campus.chance.berkeley.edu/depicare))

**UC Davis Campus and Medical Center.** The Breastfeeding Support Program provides ten lactation sites with hospital-grade electric pumps, registration and orientation classes, access to a Board Certified Lactation Consultant from the UCDMC Perinatal Unit, breastfeeding supplies through the Bookstore Corral, and an electronic discussion and support group.

**UC Irvine.** UCI's Health Care Facilitator Program provides assistance to employees and retirees (and their families) with medical plan issues, such as maximum utilization of plans and answering Medicare questions.

**UC Irvine Medical Center.** The staff at the medical center were recently surveyed regarding dependent care needs. Additionally, a new publication the Employee Resource Guide was distributed to staff.

**Lawrence Livermore National Lab.** Child care services for children of LLNL employees are available through the Lab Employee Children's Center, located about one mile from the main lab site. Part

and full-time care for children six weeks through 11 years is offered. The hours of operation are 7:00 a.m. to 6:00 p.m. Approximately 200 children are currently enrolled at the Center.

**Los Alamos National Lab.** LANL offers access to a dependent care resource and referral service through the Program for Working Families (PWF), which provides information on child care and adult care and special assistance information to LANL employees and contractors. It also works in collaboration with numerous laboratory and community organizations to address issues affecting work and/or family and dependent care issues. The Los Alamos Women's Diversity Working Group, in conjunction with PWF and community providers, recently conducted a child care needs assessment survey to collect data on the workforce's views on availability and quality of care in the community. A website for the lab workforce will soon be launched by PWF.

**UCLA Campus and Medical Center.** Child Care Services operates three child care centers serving UCLA staff, faculty, and students, in addition to publishing the "Working Parents Newsletter." Students and faculty coming to UCLA from all over the world visit Child Care Services' website ([www.childcare.ucla.edu](http://www.childcare.ucla.edu)) for information and resources on child care in Los Angeles. A monthly forum on "Choosing Child Care" is offered to all members of the campus community and offers information on selecting appropriate care. This workshop, plus free individualized child care resource counseling, serve about 700 families a year.

**Office of the President.** An Elder Care specialist comes on site monthly to consult with employees about their elder care concerns. This has proved very helpful and has been utilized by a broad spectrum of the population. An Elder Care listserv also exists, with about 120 participants.

**UC Riverside.** The Employee Assistance

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# Work/Life CONTACTS

## BERKELEY

Carol Hoffman, [choffman@uhs.berkeley.edu](mailto:choffman@uhs.berkeley.edu)  
Alison Gopnik, [gopnik@socrates.berkeley.edu](mailto:gopnik@socrates.berkeley.edu)

## DAVIS, CAMPUS AND MEDICAL CENTER

Barbara Ashby, [baashby@ucdavis.edu](mailto:baashby@ucdavis.edu)  
Carol Kirshnit, [cekirshnit@ucdavis.edu](mailto:cekirshnit@ucdavis.edu)  
Becky Nord, [rjnord@ucdavis.edu](mailto:rjnord@ucdavis.edu)

## IRVINE, CAMPUS AND MEDICAL CENTER

Prany Sananikone, [psananik@uci.edu](mailto:psananik@uci.edu)  
Pat Thatcher, [pdthatch@uci.edu](mailto:pdthatch@uci.edu)  
Laurie Lucas, [ltlucas@uci.edu](mailto:ltlucas@uci.edu)

## LAWRENCE BERKELEY NATIONAL LAB

Karen Ramorino, [KBRamorino@lbl.gov](mailto:KBRamorino@lbl.gov)

## LAWRENCE LIVERMORE NATIONAL LAB

Art Wong, [wong3@llnl.gov](mailto:wong3@llnl.gov)

## LOS ALAMOS NATIONAL LAB

Lisa Guterrez, [lisalisa@lanl.gov](mailto:lisalisa@lanl.gov)  
Judith Goldie, [goldie@lanl.gov](mailto:goldie@lanl.gov)

## LOS ANGELES, CAMPUS AND MEDICAL CENTER

Mark Speare, [mspeare@mednet.ucla.edu](mailto:mspeare@mednet.ucla.edu)  
Ruie Arnett, [arnett@chr.ucla.edu](mailto:arnett@chr.ucla.edu)  
Gay Macdonald, [gmacdonald@be.ucla.edu](mailto:gmacdonald@be.ucla.edu)  
Robert Gibson, [rgibson@chr.ucla.edu](mailto:rgibson@chr.ucla.edu)

## OFFICE OF THE PRESIDENT

Bob Nixon, [Robert.Nixon@ucop.edu](mailto:Robert.Nixon@ucop.edu)

## RIVERSIDE

Marilyn Voce, [marilyn.voce@ucr.edu](mailto:marilyn.voce@ucr.edu)

## SAN DIEGO, CAMPUS AND MEDICAL CENTER

Jonnie Craig-Winston, [jcraig@ucsd.edu](mailto:jcraig@ucsd.edu)

## SAN FRANCISCO

Alma Sisco-Smith, [almas@worklife.ucsf.edu](mailto:almas@worklife.ucsf.edu)  
Claudette Johnson (CJ), [cj@swe.ucsf.edu](mailto:cj@swe.ucsf.edu)

## SANTA BARBARA

Phillip Hammond,  
[hammond@humanitas.ucsb.edu](mailto:hammond@humanitas.ucsb.edu)  
Cynthia Cronk, [Cynthia.Cronk@hr.ucsb.edu](mailto:Cynthia.Cronk@hr.ucsb.edu)

## SANTA CRUZ

Julia Armstrong-Zwart, [jitrbug@cats.ucsc.edu](mailto:jitrbug@cats.ucsc.edu)  
Willeen McQuitta, [willeen@cats.ucsc.edu](mailto:willeen@cats.ucsc.edu)



## Work Life— continued from page 3

Program (EAP) provides confidential and cost-free consultation and referral services to UCR faculty, staff, and their family members. In addition, EAP offers a variety of presentations and support groups on such topics as “Building Healthy Relationships,” “Dealing with our Aging Parents,” and “Strategies for Successful Parenting.”

**UC San Diego Campus and Medical Center.** The Early Childhood Education Center (ECEC) will sponsor its 6th

annual “Day Care and Summer Options Expo,” an event for faculty, staff, students, and the community to assist in identifying child care options. Last year’s event had representatives from 50 vendors and was attended by 300 people. The Chancellor authorized staff to take one hour of paid leave to attend the event, which was held on March 14 this year.

**UC San Francisco.** One of three child  
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## UC Systemwide Benefits Support Dependent Care Needs

The University offers a variety of benefits to faculty and staff that can help them balance their work and dependent care responsibilities from both financial and time perspectives. Employees who have questions about these benefits should contact their local Benefits Office.

### Dependent Care Assistance Program (DepCare)

The DepCare program allows employees to pay for eligible dependent care expenses on a pretax, salary reduction basis. Qualifying dependents include children under age 13, a spouse who is physically or mentally incapable of self-care, or a dependent who lives with the employee (child over 13, sibling, parent, or in-law) who is physically or mentally incapable of self-care.

### Health Coverage for Dependents

The University offers health benefits to UC employees and annuitants and their eligible family members.

### Paid Sick Leave for Ill Family Members

Employees may use accrued sick leave when they need to provide care or be present during a family member’s illness. The number of days employees can take varies under policies and collective bargaining contracts. Family members include an employee’s spouse, parent, child, sibling, grandparent, grandchild, or other persons residing in the employee’s household. In-laws and step-relatives in the relationships listed are also covered.

### Family and Medical Leave

The University will grant up to 12 weeks of unpaid leave, with continuation of UC-sponsored medical, dental, vision, and life insurance and a return to a similar position, for employees who need to take time off for their own or a family member’s serious illness or to bond with a new child.

### Personal Leave

An employee’s department can approve up to six months of personal leave. Under some policies or collective bargaining contracts, employees must use their vacation leave before using time without pay. Some staff can request an extension of personal leave for up to one year.

### Leave for Day Care and School Activities

The California Family School Partnership Act provides time off for employees to participate in school activities such as PTA meetings, parent/teacher conferences, and field trips, provided that the child is in a licensed day care facility or kindergarten through grade 12 and the employee is the child’s parent, guardian, or custodial grandparent. Leave may be for up to eight hours per calendar month, not to exceed 40 hours per year.

### Catastrophic Leave Sharing

Under the catastrophic leave sharing program, available at many locations, some employees may be eligible to donate accrued vacation or compensatory time to another employee who has a serious illness or is caring for a seriously ill child, spouse, parent, grandparent, grandchild, sibling, in-law, step-relative in one of these relationships or any member of his/her household.

care sites on campus, The Marilyn Reed Lucia Child Care Study Center, which just completed its 21st year of operation, was the first employee-based child care center in the city of San Francisco. It also serves as a site for research in pediatric health and child development as well as a practice and observation site for various departments, including Nursing, Pediatrics, Psychiatry, and Dentistry.

**UC Santa Barbara.** A work/life task force of both faculty and staff members conducted a non-scientific e-mail survey of faculty and staff asking about work/life concerns and possible suggestions. The committee also reviewed best practices of other campuses and private sector companies to look at trends and patterns in work/life benefits and is preparing a report to the Chancellor.

**UC Santa Cruz.** The campus Child Care Services unit administers several on-campus programs for children. Two programs provide services to children of faculty and staff employees on a limited basis. These include the Infant/Toddler Program and the School Age Program, which serves the children of faculty and staff during the summer months. A third child care program, the Granary Child Development Center, which is operated by a community contractor, is also available to preschool-age children of faculty and staff.

Additionally, at the Universitywide level, a new Task Force on Child Care Policy and Programs has been launched. The Task Force is chaired by Assistant Vice President Levin and includes faculty, staff, students, and administrators from all campus locations. (Updates will be featured in future articles.) ▲

## How Each Campus May Grow

CAMPUS	1998-99	2010-11	Average Annual Growth Rate
Berkeley	27,800	31,800	1.1%
Davis	20,300	26,400	2.2%
Irvine	15,700	27,600	4.8%
Los Angeles	28,500	32,900	1.2%
Merced		5,000	
Riverside	9,550	19,900	6.3%
San Diego	16,850	27,600	4.2%
Santa Barbara	17,880	21,900	1.7%
Santa Cruz	10,420	16,900	4.1%
<b>TOTAL UC</b>	<b>147,000</b>	<b>210,000</b>	<b>3.0%</b>

mately 3,000 new faculty members for enrollment growth alone. Student services will likewise require expansion.

### Degree dreams

Add to population trends the growing value placed on the college degree. National college-going rates show 65 percent of recent high school graduates enroll in college the next fall.

Maybe it started with the GI Bill after World War II, boosting college education by underwriting costs. The increase in financial aid grants and loans that

became available in the '60s and '70s is another ingredient. Although the U.S. population only doubled since 1930, higher education enrollment increased seven times, according to the Commission on National Investment in Higher Education.

A 1996 report by the Hudson Institute Policy Research Center in Indianapolis traced higher education enrollment from 1.5 million students in 1,700 institutions after WWII to 3.6 million students in 2,000 colleges and universities 20 years later. The report calls the U.S. higher education system "indisputably the world's post secondary superpower."

"As long as a college education remains an enormous value in the job market and a person's life, the demand for it is not going to decline," said Smith.

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## Interested in Service Credit Buyback?

### Window Closing Soon!

If you are an active UC employee with a past leave of absence or a previous period of UC employment for which you received a refund of your UCRP accumulations, you may be able to increase your future retirement benefits through UCRP buyback. (Buyback refers to making payment to UCRP to establish or reestablish service credit for the earlier period.) Generally, the buyback option is available for three years after you return to UC employment.

If you returned to UC employment July 1, 1997, or earlier, your buyback opportunity is about to end! The election deadline is July 1, 2000—however, the process requires several steps, and you should start looking into it right away. Once you obtain the required documentation (payroll/personnel records), ask your Benefits Representative for a buyback estimate. Your formal request should be submitted as soon as possible.

For more information, see our website ([www.ucop.edu/bencom](http://www.ucop.edu/bencom)), or ask your local Benefits Office for a copy of *The UCRP Buyback Booklet*.

## Stay at Work/Return to Work

*In the November 1999 issue of this newsletter, we described the new "Stay at Work/Return to Work" provisions of the University-Paid and Employee-Paid disability benefit. This article expands on that topic.*

It is well known that in many instances of illness or injury, moderate activity can promote healing and minimize any resulting disability. With your doctor's and supervisor's help you may be able to continue to work while your health improves. Your doctor can advise you if staying at work part-time is good for you. With this new plan feature, if you become sick or injured and need to work part-time, and your supervisor determines that part-time work is appropriate, you will now be able to supplement your part-time income with disability income benefits.

Once your doctor has determined you have a disabling condition that might allow you to work part-time, you should meet with your local Benefits Representative (BR) to discuss the necessary steps you need to take. Your BR will give you an "Attending Physician's Statement" for your doctor to complete and you and your supervisor will need to discuss your work options.

Since the "Stay at Work/Return to Work" benefit is a part of your University-Paid and Employee-Paid disability program, Liberty Mutual must approve your request for benefits and you will need to fulfill your selected "waiting period." The new "Stay at Work/Return to Work" provision has a 12 month maximum benefit period.



For additional information about the new "Stay at Work/Return to Work" part-time supplementary income, contact your Benefits Office. Your local Vocational Rehabilitation Counselor is also available to discuss issues such as workplace modifications. ▲

## "Agency Fee" Law Takes Effect

On January 1, 2000, a California law (SB 645-Burton) took effect requiring UC employees who are in a bargaining unit exclusively represented by a union either to join the union and pay its dues or to pay an agency fee (fair share) to the union. The fee is to help cover the union's costs for negotiation, contract administration, and related activities. Administration of the new law is being handled by the Public Employment Relations Board (PERB), which has proposed regulations governing both the unions' and UC's roles in implementing the agency fees.

After a union notifies UC of its intention to implement agency fees for employees not paying union membership dues who are in a bargaining unit exclusively represented by the union, UC will begin taking monthly deductions and passing these deductions on to the union. By law, the fee cannot exceed the union's regular membership dues. By press time,

agency fees had been implemented for all units exclusively represented by AFSCME, CNA, UPTA, Graphic Communications Unit, and IUOE Local 501. As unions representing other bargaining units announce their intention to implement agency fees, UC will inform affected employees by letter.

The new law allows an employee who is "a member of a bona fide religion, body or sect that has historically held conscientious objections to joining or financially supporting public employee organizations" to instead pay an amount equivalent to the agency fee to a "nonreligious, nonlabor charitable fund." An employee who qualifies as a conscientious objector will have the choice of contributing an amount equivalent to the agency fee to one of three selected charities.

PERB's proposed regulations require unions implementing an agency fee to

notify affected employees either prior to or concurrently with the first deduction. The information an employee receives from his or her union should explain any appeal procedures regarding the amount of the agency fee, as well as the procedures for establishing conscientious objector status. Employees with questions about these procedures or any other aspect of the agency fee implementation, including questions about how an agency fee will be spent, should contact the union directly.

Questions about the law itself should be directed to PERB at:

**California Public Employment  
Relations Board**  
1031 18th Street  
Sacramento, CA 95814-4174  
Phone: 916-322-3198

Updated agency fee information is also available on the UC HR/Benefits website ([www.bencom.edu.humres](http://www.bencom.edu.humres)). ▲

# UCTV Takes to the Airwaves

## Dedicated to Educational and Enrichment Programming

The University of California announced on January 13, 2000, that it has launched its own public interest television channel (UCTV), capable of reaching more than three million viewers on prime time television seven days a week throughout North America.

"This is an important milestone for the University of California," said UC President Richard C. Atkinson, a prime proponent of inviting the public to find out more about UC through new electronic media.

"Chancellors of the ten UC campuses share my excitement over this new opportunity to serve California and the nation. In an era of 90-second news stories, there is a real need for in-depth coverage of ideas and issues that affect the lives of people everywhere," he said.

The channel is available on EchoStar's Dish Network satellite television service. UCTV is broadcast on channel 9412 and is available to viewers with a satellite dish antenna pointed at 119 degrees West Longitude.

The charter of the program is to use the resources of UC to inform, educate, and enrich the lives of viewers throughout the nation. The channel will broadcast faculty lectures, interviews, research symposia, distinguished speakers, and artistic performances 24 hours a day, seven days a week.

"It was a major accomplishment to get this program up and working under a tight deadline. We look forward to working on the quality of the broadcasts so that viewers will turn to our channel first for in-depth information," said Julius Zelmanowitz, UC interim vice provost of academic initiatives, who helped prepare and submit the UC proposal to EchoStar.

Zelmanowitz said that UCTV will allow UC faculty to share the results of their scholarship and cutting-edge research directly with the public across a broad range of subject areas.

The UC channel schedules blocks of time both for thematic subjects—science, technology, health, arts, public affairs and humanities, for example—and for individual campuses.

Programs are broken into two four-hour blocks for an eight-hour total during East Coast prime time, 3 p.m. to 11 p.m. In the short term, a bulletin board with pertinent UC facts and information will fill remaining time. The programs airing on UCTV also will be broadcast live on the Internet ([www.uctvonline.org](http://www.uctvonline.org)).

Current programs include a discussion of global change by UC Irvine's Nobel Laureate F. Sherwood Rowland, a gamelan ensemble concert from UC Riverside, a film historian's research from UC San Diego on all-black westerns, and a UCLA professor's study of sabertooth cats.

UCTV will build on the success of a broadcast channel developed by the University of California at San Diego seven years ago. Today, UCSD-TV (Channel 35) serves one million homes in San Diego and provides programming to other stations around

***"This is an important milestone for the University of California"***

**Richard C. Atkinson,  
UC President**

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# Collective Bargaining

## UPDATE

Regular updates on collective bargaining in all Universitywide bargaining units are available on the Internet ([www.ucop.edu/humres/labor](http://www.ucop.edu/humres/labor)). Current UC collective bargaining agreements for both systemwide and local units are also posted at the site.

The University is currently engaged in bargaining for first-time contracts covering Clerical employees, represented by the Coalition of University Employees (CUE), and UC Police Officers, represented by the Federated University Police Officers Association (FUPOA).

Bargaining is continuing for the University's new Graduate Student units.

Reopener negotiations begin later this spring on limited issues in current contracts covering Patient Care Technical employees (AFSCME), Service employees (AFSCME), Research Support Professionals (UPTE), and Health Care Professionals (UPTE).

Negotiations for successor agreements to contracts scheduled to expire later this year are scheduled to begin in the spring for the American Federation of Teachers (AFT)-represented Librarian unit and Non-Senate Instructional Unit, and for the California Nurses Unit (CNA). In the fall, negotiations for a successor contract covering the Technical Unit (UPTE) will begin. ▲

the country, including stations in New York City, Seattle, Palo Alto and Washington, D.C. "UCSD has long supported the use of broadcast programming to give the general public access to knowledge, ideas and entertainment from both the campus and the local community," said its chancellor, Robert C. Dynes. "The success and value of UCSD-TV, now in its seventh year, is the model for UCTV and we are pleased to play a key role in the development of unique and innovative broadcast capabilities for the UC system." It is expected that UCTV, like UCSD-TV, will focus on UC activities, but also will develop programs through partnerships with community organizations. Currently, UCSD-TV partners with the San Diego City Club, the San Diego Union-Tribune, Natural History Museum,

San Diego Opera, Old Globe Theatre and many other organizations. UCTV will expand the model around the state. "UCTV will help us meet our commitment to improve K-12 education. UC programs can help K-12 teachers in their classroom work and in staying up-to-date on the newest developments in their disciplines. And in the near future, students and their parents may only have to turn to our channel to get information on admissions and course requirements for access to college," said Atkinson. The UCTV channel enables EchoStar to meet its obligation to set aside four percent of its airtime for public interest education programming, under Federal Communications Commission rules based on the 1992 Federal Cable Act. ▲



**Schedule of Featured Programs on UCTV:**

Broadcast Times:	3:00–7:00 p.m.	7:00–11:00 p.m.
Monday	Humanities	Health
Tuesday	Arts	Science
Wednesday	Health	Public Affairs
Thursday	Science	Business and Law
Friday	Public Affairs	Humanities
Saturday	Business and Law	Arts
Sunday	Highlights of the Week	Highlights of the Week

*Note: As this newsletter was going to press, UCTV announced an additional four hours of daily programming from 7:00 - 11:00 a.m.*

**Long-Term Care Insurance Info**

Generally, medical insurance and/or Medicare do not cover long-term care needs. Some long-term care policies may provide a daily payment for nursing home care, while others cover hospice programs.

If you are interested in long-term care insurance, a wealth of information is available to address such issues as:

- Defining what long-term care is;
- Whether you need long-term care insurance;
- What to look for in a policy; and
- How to find out the benefits, the costs, and their appropriateness for you and/or your family members.

**Publications and Information**

The NAIC (National Association of Insurance Commissioners) offers a booklet called "A Shopper's Guide to Long-Term Care Insurance." For a copy (the first copy is free), write to: **NAIC, 2301 McGee Street, Ste. 800, Kansas City, MO 64108. Or visit their website ([www.naic.org](http://www.naic.org)).**

UC staff who reviewed this booklet found that it gave them a basic understanding of this topic as well as helpful tips for evaluating policies.

**California Department of Aging**

Provides a packet of materials, telephone counseling, and face-to-face counseling throughout the state.

Medicare enrollees, call toll-free: **1-800-434-0222, 9:00 a.m.–3:00 p.m., PT.**

If you are not enrolled in Medicare, call toll-free: **1-800-510-2020** to be automatically transferred to a senior services office in the county from which you are calling. The website address is: **[www.aging.state.ca.us](http://www.aging.state.ca.us)**

**New Mexico Department of Aging**

Telephone: **1-800-432-2080** (within New Mexico only) or **1-505-827-7640** for information.

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### **AARP (American Association of Retired Persons)**

AARP members aged 50–79+11 months can obtain long-term care information by calling **1-800-452-1393**, or by visiting their website ([www.aarp.org](http://www.aarp.org)).

### **Policies**

#### **CalPERS (California Public Employees' Retirement System)**

CalPERS is offering another opportunity for UC employees and annuitants to sign up for its long-term care program. The new application period begins on April 1 and runs through June 30, 2000.

The CalPERS Long-Term Care Program provides quality coverage that is more affordable than before. All premiums are age-related. The younger you are, the less a plan costs. You may request a free application kit on the Internet ([www.calpers.ca.gov/longtermcare](http://www.calpers.ca.gov/longtermcare)) or by calling **1-800-338-2244** today.

#### **TIAA-CREF (Teachers Insurance and Annuity Association—College Retirement Equities Fund) Teachers Long-Term Care:**

You may enroll in the long term care insurance plan at any time during the year by calling 1-800-223-1200 and pressing 4. Office hours at TIAA-CREF are Monday through Friday, 8:00 a.m.–11:00 p.m., ET. You may also visit their website ([www.tiaa-cref.org](http://www.tiaa-cref.org)). ▲

## **Discount Prescriptions for Medicare Enrollees in California!**

On February 1, 2000, the “discount prescription medication program” sponsored by State Senator Speier (SB 393) was implemented. This law allows Medicare enrollees who now pay retail prices for their prescription medications to buy those medications at lower Medi-Cal rates. The law also may benefit Medicare enrollees in a UC-sponsored plan by allowing them this same option. It requires all pharmacies participating in the Medi-Cal program to charge Medicare enrollees the same discount price as Medi-Cal recipients (there is also a 15 cent processing fee per prescription). This discount program does not apply to over-the-counter drugs (or to compounded drugs that must be mixed by the pharmacist).

Anyone who has a Medicare card is eligible. There are no forms to fill out. Every month, Medi-Cal establishes a Medi-Cal price for **all** drugs in the market. Medicare patients need only show their cards at pharmacies that fill Medi-Cal prescriptions to get **any** prescription for any drug in the market filled at the Medi-Cal price.

The following describes how the law should impact UC employees, annuitants, and/or their family members who are enrolled in Medicare and in a UC-sponsored medical plan and have their prescription filled in California:

**Core and the High Option Plans:** Members should pay the Medi-Cal discount price for the drug, then submit a claim to the plan for reimbursement.

**UC Care and all HMOs:** Members should pay the normal plan copayment; however, if a member presents a Medicare card in addition to the plan card and the pharmacy finds that the Medi-Cal discount price is less, the member will be charged the lesser amount.

The following questions are selected from the **Medi-Cal Update—Pharmacy, Bulletin 479**, Frequently Asked Questions.

#### **Q. Who is eligible?**

A. Anyone who has a Medicare card is eligible. That includes seniors over age 65 and those under age 65 who are disabled and have a Medicare card. You do not have to be on Medi-Cal.

continued on page 10



## **UC Care Members—Accessing your Prescription Coverage**

Employees, annuitants and family members enrolled in the UC Care medical plan: When you fill or refill a prescription in 2000, be sure to tell the pharmacist that your prescription drug carrier changed from Merck-Medco to Prudential HealthCare (PHC) beginning January 1, 2000. Otherwise, your pharmacist may tell you the prescription is denied by your insurance plan!

PHC has alerted its contracted pharmacies about this change, and once the pharmacies update their systems, your access should be validated automatically. Until then, showing your UC Care identification card should solve any problem. The pharmacist can use the toll-free number found on the card (1-800-313-3804) to verify your eligibility and revise your “patient profile” record accordingly.

Note: This process does not apply to mail order maintenance drugs, which are now available through Integrated Pharmacy Solutions, Inc. To request order forms, call in your prescription refill, or check on the status of your order, call Customer Service at 1-800-732-2165. ▲

## Discount Prescriptions for Medicare Enrollees in California continued from page 9

### Q. What drugs are covered?

A. Virtually every prescription medication is covered. There is no restricted formulary and there is no prior authorization. However, over-the-counter drugs are not covered under this new program.

### Q. Can I go to any pharmacy I want to get the Medi-Cal price?

A. Only Medi-Cal pharmacy providers are required to charge a Medicare recipient the Medi-Cal prescription rate. The vast majority of pharmacies in California (over 5,000 pharmacies) participate in the Medi-Cal program. You may want to ask your pharmacy if it is a Medi-Cal provider. Additionally, a non-Medi-Cal pharmacy may be willing to charge a similar prescription rate.

### Q. What if I already have prescription coverage, will this new program affect it?

A. You should continue to use your current insurance coverage if it is more advantageous to do so. This new program should not affect your current prescription coverage. The new program is intended for any prescription whose entire cost is paid for by the Medicare enrollee.

For example:

- If you have reached your yearly or monthly prescription limitation under your insurance program, and now have to pay for your prescriptions, you may want to use this new program.

- If your prescription insurance coverage doesn't cover a certain prescription drug, you may want to use this new program.

- If you have a deductible to meet before your coverage begins, you may want to use this new program.

### Q. Will this program affect my Medicare coverage?

A. No, this program does not affect your coverage under the Medicare program.

To learn more about the new law and review all of the questions and answers, go to UC's benefits website ([www.ucop.edu/bencom](http://www.ucop.edu/bencom)) and click on "Attention Medicare Enrollees in California" listed under "What's New." ▲

## VSP's Laser Vision Update

Beginning April 1, 2000, the Vision Service Plan (VSP) Laser VisionCare<sup>(sm)</sup> program will be available to UC employees and their enrolled family members. Laser vision correction has become an option for many people who are farsighted, nearsighted or who have an astigmatism.

VSP's program includes a Laser VisionCare Learning Source<sup>(sm)</sup> education program, designed to help you make an informed choice about this surgical procedure. Visit VSP's website ([www.vsp.com](http://www.vsp.com)) to learn more.

To use Laser VisionCare, call your VSP doctor to find out if he or she is participating in the program. If you don't have a VSP doctor, you can find one on their website or by calling VSP at 1-888-354-4434.

Next, schedule a complimentary screening and consultation on the benefits and risks of laser vision correction. Your VSP doctor will provide pre-operative care and can also make arrangements with one of the many VSP approved laser surgeons and centers. ▲

## UCRP Re-Examines Retirement Benefits

In response to retirement benefit changes adopted recently by the California Public Employees' Retirement System (CalPERS), UC Human Resources and Benefits is evaluating the feasibility of implementing retirement benefit enhancements.

Discussions are underway with faculty committees and other University groups regarding possible UCRP retirement benefit enhancements. Aware that any such changes will have impact far beyond the financial considerations of the Plan, UC administrators have initiated the consultations to assess the related needs and goals of various segments of the UC community. A variety of benefit improvement options will be evaluated based on their cost, their effect on the University's overall goals regarding the recruitment, retention and renewal of qualified faculty and staff, and their fairness to all UCRP members.

For many CalPERS members, the age factor change (effective January 1, 2000) represents the first benefit formula enhancement in over 30 years. During the same period, UCRP members have enjoyed numerous benefit enhancements. While UCRP benefits are often compared to those of CalPERS, any changes made to one retirement system do not necessitate changes to the other; if changes are made to UCRP they will not necessarily mirror the new provisions of CalPERS. Note that any change to UCRP would require endorsement by the UCRS Advisory Board, approval by The Regents, and significant notification to UCRP members.

As discussions continue, we will issue updates on our benefits website ([www.ucop.edu/bencom](http://www.ucop.edu/bencom)) and in employee publications. ▲

# UC Retirement Savings and Investment Plans

## UC Account Balances Online

As of February 2000, participants in UC's Defined Contribution and Tax-Deferred 403(b) plans can now see their current Plan balances online by visiting UCbencom ([www.ucop.edu/bencom](http://www.ucop.edu/bencom)). The site will be updated monthly to reflect gains/losses in the value of participants' accounts in the UC-managed investment funds. Account activity such as 403(b) Plan loan repayments, distributions, and any other balance adjustments will be reflected approximately four times a month.

Also available online are University of California Retirement Plan accrued service credit and balances as well as any Capital Accumulation Provision (CAP) balance.

To view your UCRS account balance(s) on UCbencom, simply click on the "UCRS Account Balances" icon on the right-hand margin of the home page. To access this particular application, you will need to enter your Social Security number and your Benefits Personal Identification Number—your Benefits PIN. If you never received your PIN or have lost or forgotten it, call your local Benefits Office. Inactive employees should call the UC HR/Benefits Customer Service Center at 1-800-888-8267.

Another technological triumph looming on the horizon for UC Plan participants is one we'll be especially pleased to debut—online fund transfers between the UC-managed funds. This feature will allow participants to transfer their money from one UC fund to another without having to fill out a form. Look for announcements of the official "launch" of online transfers on UCbencom or in your local campus/lab publications in the near future.

## Need a Loan? Use the Loan Line

Reminder—eligible 403(b) Plan participants who want to borrow their money

in the Plan (active UC employees with a Plan balance of at least \$1,000 in the UC-managed funds) must call the Loan Line on [bencom.fone](http://bencom.fone) (1-800-888-8267) to make a loan request. The Loan Office no longer processes paper loan applications.

Loan requests must be made on the Loan Line by the last work day of any given month for that month's fund valuation. Upon proper completion of the necessary loan documents, which are mailed to your address of record

within seven business days of your loan request, checks for the loan proceeds are generally issued within three to eight weeks.

Please note—your decision to participate in the 403(b) Plan represents a conscious commitment to save for your retirement years, and you should borrow the money you have contributed to the 403(b) Plan only if it is absolutely necessary. Although you are not penalized if you take a 403(b) Plan loan, you do risk the loss of earning potential. ▲

## UC-Managed Investment Funds

### Performance Results

Since November 30, 1999, the UC-managed investment funds have generated the following monthly unit values and interest factors:

AT	THE UNIT VALUE WAS			THE INTEREST FACTOR WAS		
	Equity	Bond	Multi-Asset	Savings	ICC	Money Market
11/30/99	296.957	106.912	27.738	.4813%	.5562%	.4541%
12/31/99	313.281	106.130	28.363	.4960%	.5762%	.4840%
1/31/00	307.166	106.749	28.226	.5045%	.5743%	.4858%
2/29/00	315.359	109.749	28.723	.4762%	.5307%	.4673%

### Rates of Return as of February 29, 2000

### Annualized

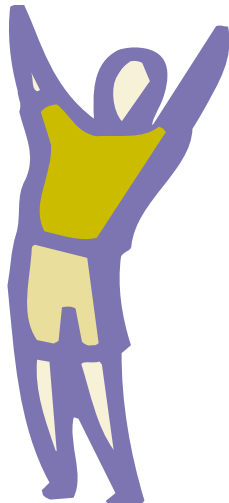
	1-YEAR	5-YEAR	10-YEAR
<b>TOTAL RETURN FUNDS</b>			
Equity	26.50%	23.30%	17.69%
Bond	-1.25%	12.44%	11.25%
Multi-Asset	11.94%	13.27%	N/A
<b>INCOME FUNDS</b>			
Savings	6.02%	6.21%	6.99%
Insurance Company Contract	6.96%	7.49%	8.01%
Money Market	5.38%	5.63%	5.46%

*The investment returns shown here represent past performance and are not necessarily indicative of future results.*

Participants with Internet access can also get the latest investment performance results for the UC-managed funds by visiting UCbencom. To get there, go to [www.ucop.edu/bencom](http://www.ucop.edu/bencom) and select "Tax-Deferred 403(b) Plan and DC Plans, Unit Values and Interest Factors" on the left. The UC funds are valued monthly, and the new unit values and interest factors are posted on our website around the 10th of each month. ▲

## Life Events

Providing benefits for your family members and beneficiaries is an important part of the University's comprehensive benefits program. The UC-sponsored health, welfare, savings and investment plans are all part of a large University umbrella that covers you and the people dearest to you today and in the future.



A topic often put off when we're younger and a difficult one to discuss and plan for even as we grow older, is our own death. Do you know what benefits will be available to take care of your family members and beneficiaries when you die? Hopefully the following information will alleviate some

fears, answer some questions, and help you take the steps necessary to provide for your family.

Benefits available through UC might include monthly income paid by the University of California Retirement Plan (UCRP), continued medical and dental coverage for family members, savings or investment accounts (such as 403(b) Plan contributions), and life insurance proceeds. If you want to better understand the benefits the University provides for your survivors, you can use the enclosed postcard to request one of the Survivor and Beneficiary Handbooks. In addition to describing the various benefits, the handbooks answer commonly asked questions.

There are three versions of the Survivor and Beneficiary Handbook, one for UC employees, one for former employees, and one for annuitants (retirees and those receiving UCRP disability income).

We also have a new advisory booklet, *Preparing for the Inevitable*, which was created to help you and your family prepare for your death and assist your survivors in taking appropriate action following your death. The booklet includes a proposed outline for organizing and recording your personal and financial information along with other advice on what you can do now to make things easier for your loved ones. *Preparing for the Inevitable* is based on a brochure by Richard W. Gable, Professor Emeritus, UC Davis, which he originally prepared for the UC Davis Emeriti Association.

You can request a copy of any of these by returning the enclosed postage paid postcard. These booklets are also available on the UCbencom website under "Life Events." We hope you and your family will find these to be a helpful resource. ▲

## UC Survey of Medical Plan Member Satisfaction

The University is working with DSS Research to conduct a member satisfaction survey of certain UC-sponsored medical plans. (DSS is an independent research firm located in Arlington, Texas.) The survey, scheduled to be issued in early April, will measure member satisfaction during calendar year 1999. A pre-survey notification letter is scheduled to be mailed to survey participants on March 30.

Now in its third year, the survey will be sent to approximately 15,000 randomly selected UC members enrolled in Heath Net, Kaiser, PacifiCare, UC Care, Western Health Advantage, BluePremier HMO New Mexico, and in BluePremier POS "in area" benefits.

UC medical plan members who may receive the survey include UC employees, annuitants, and their family members who were 18 years or older as of December 31, 1999. Members whose primary medical coverage is through Medicare will not be receiving the survey.

Results for all of our medical plans included in the member satisfaction survey will be available in the fall. The results of the survey will help employees and annuitants evaluate the medical plans when choosing a plan during Open Enrollment in November. ▲



## New Faces

Who are some of the new Human Resource Directors, you may have seen around your campus, medical center or lab?



Human Resource Directors Gail Brooks, UCI and Sandra Haire, UCB are pictured here with Judy Ackerhalt, Executive Director Retirement Services Center. Brooks and Haire were attending a meeting held in Oakland earlier this year.

Another Human Resource Director (not pictured) is Helga Christopherson, new to LANL. ▲

## Useful Profiles

### Workforce Profile

*Workforce Profile 1999*, a useful publication presenting statistical and demographic information about the UC workforce as of October 1998 systemwide data reports, is available on the Internet at: [www.ucop.edu/humres/profile/1998](http://www.ucop.edu/humres/profile/1998).

Among other data, the report presents overall headcount and full-time equivalent (FTE) workforce statistics; gender, ethnicity, age, length of service, and average salary statistics; information on union representation; and various breakouts of staff employee categories and appointment types.

### Career Staff Workforce Report—1999

An updated (1999) version of the statistical report *Composition of the Career Staff Workforce at the University of California by Race and Sex* is now available online ([www.ucop.edu/humres/stats.html](http://www.ucop.edu/humres/stats.html)). The data covers career employees at the nine UC campuses and Office of the President. UC employees at the national laboratories are not included.

### Graduate Students and Faculty Composition —1999

*Composition of Graduate Students and Faculty at the University of California by Race and Sex* is available online ([www.ucop.edu/acadadv/datamgmt/pub-99.html](http://www.ucop.edu/acadadv/datamgmt/pub-99.html)).

## Tidal Wave II— continued from page 5

### New options

To deal with that demand, colleges across the country are exploring options such as:

- UC is looking at added off-campus enrollment in study-abroad programs and distance learning, as well as accelerating by one quarter or one semester the time taken to graduate. More courses may be added at night, late afternoons and weekends.
- The Western Governors University is an on-line university operated by a consortium of states. Participating states set up local centers with counseling and technological aid.
- At Northern Arizona University, some students may attend large lecture courses via the Internet. Some schools require students to take a certain number of units via distance learning.
- Joint-use facilities. In Nevada, the K-12 schools are linking with community college campuses in Reno and Las Vegas.
- Sending more students to summer school. The Florida Legislature passed a law in the 1980s requiring college students to attend at least one summer session.
- Dual enrollment in high school and college, enabling new high school graduates to amass college credits before enrolling full-time.
- Capping the number of credits students can earn, or limiting units required for a baccalaureate degree. In the past, Montana's legislature ordered students to pay full rather than state-subsidized tuition if they take more than a set number of units.
- Enacting tougher eligibility standards or raising fees. Such legislative actions may be politically unpopular but nevertheless can effectively limit enrollment. ▲

*Tidal Wave II* was written by Kathleen Maclay and produced by the UC Berkeley Office of Public Affairs.

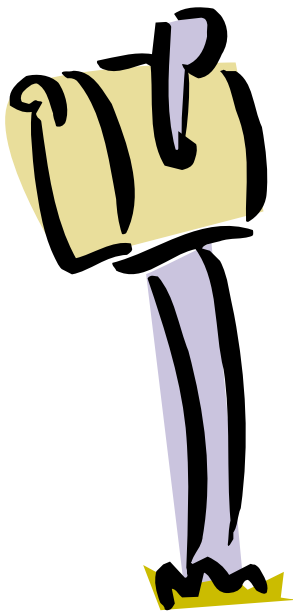
# In the Mail

## Look for the following mailings in March

### Semi-Annual Statements

Participants in the Tax-Deferred 403(b) Plan and the Defined Contribution Plan should have already received a semi-annual statement for the year ending December 31, 1999.

If you would like to review your current balances, please go to the UCbencom website ([www.ucop.edu/bencom](http://www.ucop.edu/bencom)) or call bencom.fone (1-800-888-8267). You will need to provide your Social Security number and Benefits Personal Identification Number (PIN) when accessing this information. If you have lost or forgotten your PIN, please contact your local Benefits Office. Inactive members should call UC HR/Benefits Customer Service (1-800-888-8267) for a new one.



### Alternative Contribution Limit Election

In mid-March, participants in the Tax-Deferred 403(b) Plan who elected an alternative contribution limit in 1999, received alternative limit worksheets for 2000 and an election form in the mail. See article on page 15.

### Request for Tax Verification

The annual Request for Tax Verification will be mailed to employees and annuitants in late March. UC requests tax records from employees and annuitants whose family members (who are enrolled in UC's group insurance plans) include those for whom tax dependency is a requirement of eligibility. Tax dependency is required for these family members: adult dependent relative; stepchild; legal ward; grandchild; child or grandchild of a same-sex domestic partner; disabled child age 23 or older; "other" child enrolled before 9/1/94. The tax records will be due in late April 2000.

### Maximum Annual Contribution Statement

If you are a participant who contributed to the Tax-Deferred 403(b) Plan during 1999, your 2000 *Statement of Maximum Annual Contribution* will be mailed to you in late March. See article on page 15.

### UC Medical, Dental and Vision Plan Carriers

Most carrier mailings for the new plan year have now been completed. If you have not received a new medical plan evidence of coverage card and believe you should have, please contact the carrier directly. ▲

## Editor's Note:



The scope of this newsletter is continuously evolving. In this issue we include articles such as "Tidal Wave II" and "UCTV Takes to the Airwaves" to provide you with a glimpse of the impact UC has at the state and local level, and to keep you abreast of changes ahead.

## NOTICE

If you are a former UC employee who left University of California Retirement Plan (UCRP) money on deposit, UC will continue to send this newsletter to you. This newsletter is the official vehicle by which UC notifies both active and inactive UCRP members of changes that can impact any future retirement benefits to which you may be entitled.

## Veterans Day

Beginning in November 2000, Veterans Day will become an official University of California holiday. This year, since November 11th falls on Saturday, the preceding Friday, November 10th, will be observed by the University community.

# Tax-Deferred 403(b) Plan Maximum Annual Contributions (MAC)

## What's New for 2000?

**The Tax Reform Act limit has increased from \$10,000 to \$10,500.**

**Schedule.** This year's MAC statements, which tell current employees how much they can contribute to the 403(b) Plan in 2000, are scheduled to mail as follows:

- **Mid March** – To participants who elected an alternative contribution limit in 1999
- **Late March** – To all participants who contributed to the 403(b) Plan in 1999 and are on active payroll status in January 2000
- **Early May** – To employees who did not contribute to the 403(b) Plan in 1999 but are eligible to contribute in 2000

If you want to find out the information that was used to calculate your MAC, you will be able to request an explanation from UC HR/Benefits interactive telephone service, [bencom.fone](http://bencom.fone). Call 1-800-888-8267 at any time after you

receive your statement and follow the prompts to request a Maximum Annual Contribution Calculation and Data Explanation. This document will be faxed or mailed to you.

As in previous years, MACs will be set in payroll systems on or about April 1. At that time, your MAC should also be available on the UC HR/Benefits website ([www.ucop.edu/bencom](http://www.ucop.edu/bencom)) as well as on [bencom.fone](http://bencom.fone). You can enroll in the 403(b) Plan or change or cancel current contributions through either medium. On the home page, click on the penny icon labeled "Savings & Investment Plans," or for [bencom.fone](http://bencom.fone), call 1-800-888-8267.

To use either [UCbencom](http://UCbencom) or [bencom.fone](http://bencom.fone), you will need your Social Security number and your Benefits Personal Identification Number (PIN). If you've lost or forgotten your PIN, your local Benefits Office can help you get a new one. ▲

## Alternative Contribution Limit Election

Tax-Deferred 403(b) Plan participants who elected an alternative contribution limit in 1999, should have received alternative limit worksheets for 2000 and an election form in mid-March.

This year, UC HR/Benefits changed the way we implement alternative election and maximum annual contribution (MAC) limits. These changes should allow your 403(b) Plan contributions to continue throughout the year without interruption.

If we receive your completed worksheet and election form no later than June 1, 2000, your 2000 alternative contribution limit will replace your 1999 alternative contribution limit at the time

your election is processed. If we don't hear from you by June 1, your University-calculated MAC for 2000 will automatically replace your 1999 alternative contribution limit on July 1. This MAC may be less than your 1999 alternative contribution limit, and your contribution may stop. (You may submit an alternative limit election after June 1, but no later than October 2.)

Please submit your alternative election materials early to prevent any interruption of your 403(b) contribution. Note that for 2000 the Tax Reform Act limit has increased to \$10,500 from \$10,000 in 1999. ▲

## HR/Benefits Review

Spring 2000

HR/Benefits Review is published by University of California Human Resources and Benefits to provide news and information to UC employees. Points of view or opinions do not necessarily represent those of the University.

Editor: Janie Kirsch

Contributors: Yvonne Anderson

Bruce Goya

Kris Lange

Mary Spletter

Design: Maria Theren

Photography: Susan Otterson

UNIVERSITY OF CALIFORNIA  
HUMAN RESOURCES AND BENEFITS

300 Lakeside Drive, 5th Floor  
Oakland, CA 94612-3557

Associate Vice President:  
Judith W. Boyette

Director, Communications  
and Training Services:  
Barbara Facey

By authority of The Regents, University of California Human Resources and Benefits, located in Oakland, administers all benefit plans in accordance with applicable plan documents and regulations, custodial agreements, University of California Group Insurance Regulations, group insurance contracts, and state and federal laws. No person is authorized to provide benefits information not contained in these source documents, and information not contained in these source documents cannot be relied upon as having been authorized by The Regents. Source documents are available for inspection upon request (1-800-888-8267). What is written here does not constitute a guarantee of plan coverage or benefits-particular rules and eligibility requirements must be met before benefits can be received. The University of California intends to continue the benefits described here indefinitely; however, the benefits of all employees, annuitants, and plan beneficiaries are subject to change or termination at the time of contract renewal or at any other time by the University or other governing authorities. The University also reserves the right to determine new premiums and employer contributions at any time. Health and welfare benefits are subject to legislative appropriation and are not accrued or vested benefit entitlements. If you belong to an exclusively represented bargaining unit, some of your benefits may differ from the ones described here. Contact your Human Resources Office for more information.

In conformance with applicable law and University policy, the University is an affirmative action/equal opportunity employer. Please send inquiries regarding the University's affirmative action and equal opportunity policies for staff to Director Mattie Williams and for faculty to Executive Director Sheila O'Rourke, both at this address: University of California Office of the President, 1111 Franklin Street, Oakland, CA 94607.

Websites: [www.ucop.edu/bencom](http://www.ucop.edu/bencom)  
[www.ucop.edu/humres](http://www.ucop.edu/humres)



University of California  
Human Resources and Benefits  
300 Lakeside Drive, 5th Floor  
Oakland, California 94612-3557

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# HR/Benefits Review

University of California  
Human Resources and Benefits  
300 Lakeside Drive, 5th Floor  
Oakland, California 94612-3557

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# HR/Benefits Review

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