

University of California Retirement Plan (UCRP)

One-time UCRP Service Credit Allocation Program

One-time University of California Retirement Plan (UCRP) Service Credit Allocation Program

To recognize the contributions of University of California staff employees who have worked for UC in temporary positions, the Regents approved changes to the University of California Retirement Plan. One of these changes is the One-time UCRP Service Credit Allocation Program.

Under this program, certain UCRP members receive an automatic allocation of one or two years of UCRP service credit. The initial allocations occurred in May 2001, and went to eligible staff employees who were active UCRP members as of January 1, 2001. Additional automatic allocations will occur through January 2002, as new UCRP members become eligible. Employees allocated service credit under this program receive written notification from UC/HR Benefits.

The automatic allocations are based on the best available records, and unfortunately it is not possible to automatically identify everyone eligible.

To Request an Allocation

Staff employees who are UCRP members but did not receive the automatic allocation may request an allocation if they had at least six consecutive months of temporary employment prior to January 1, 2001. For eligibility requirements and information on requesting an allocation, see *Requesting A UCRP Service Credit Allocation* on page 3.

To Appeal the Allocation

UCRP members who received an allocation but believe they qualify for more service credit may **forfeit** their allocation and appeal for a correction of the service credit allocation under this program. For eligibility requirements and information about appealing an allocation, see *Appeal for Service Credit Calculation* on page 7.

Employment Exempt from this Program

- Per diem appointment
- Appointments under a special compensation plan without covered compensation (such as “By Agreement”)
- Employment while primarily at UC for education or training
- Employment in an academic or faculty position
- Employment while receiving UCRP monthly retirement income or UCRP disability income
- Employment while a contributing member of another retirement plan to which the University contributes (e.g., CalPERS)
- Employment with a non-University employer
- Employment with UCSF Stanford Health Care or joint/split appointments with a non-UC employer

Note: No years of employment with the University may count twice for determining service credit under UCRP.

UCRP service credit is used to determine eligibility for UC retirement benefits and to calculate benefits payable; for a complete explanation about UCRP retirement benefits, refer to the appropriate University of California Retirement Plan Summary Plan Description for your classification. Summary Plan Descriptions are available from UCbencom (www.ucop.edu/bencom) and local Benefits Offices.

Requesting a UCRP Service Credit Allocation

If you did not receive a UCRP service credit allocation, but believe you qualify for one based upon your previous temporary employment, please read the following explanation of eligibility requirements and instructions for requesting an allocation.

If you have received a UCRP service credit allocation and you wish to forfeit your allocation and appeal for a review of your records, read *Appeal For Service Credit Calculation* on page 7.

Establishing Eligibility

You are eligible for a UCRP service credit allocation if you:

- had an active University appointment on January 1, 2001 (or were on an approved leave with or without pay on that date); and
- were an active UCRP member on January 1, 2001 (or will become a UCRP member by December 31, 2001); and
- had a period of temporary employment that:
 - occurred before January 1, 2001; and
 - lasted at least six consecutive months, based upon your appointment start and end dates (regardless of the hours or percentage of time worked).

Your employment must not be exempt from this program, as listed on page 2.

If you meet these criteria, please read the following instructions on how to request an allocation. Employees eligible under this program will receive UCRP service credit as follows:

One Year of UCRP Service Credit:

If you had at least six but not more than 12 consecutive months of temporary UC employment, you will receive one year of UCRP service credit.

Two Years of UCRP Service Credit:

If you had more than 12 consecutive months of temporary employment at UC, you will receive two years of UCRP service credit.

The examples (see right) show how UCRP service credit is awarded for temporary employment.

Example 1:

Eligible temporary appointment:
8/98 - 4/99 (nine months)

The member receives a one-year UCRP service credit allocation.

Example 2:

1st eligible temporary appointment:
8/98 - 4/99 (nine months)

2nd eligible temporary appointment:
5/99 – 10/99 (six months)

The member receives a two-year UCRP service credit allocation. The temporary appointments totaled more than 12 consecutive months.

Example 3:

1st eligible temporary appointment:
8/98 - 4/99 (nine months)

2nd eligible temporary appointment:
6/99 – 9/99 (four months)

The member receives a one-year UCRP service credit allocation. The temporary appointments were not in consecutive months.

How to Request an Allocation

1) Complete the attached UBEN 171 form (UCRP Service Credit Allocation Request form).

2) Obtain your employment records.

Contact your local Benefits Office or the person in your department who handles benefits to obtain your employment records. Acceptable employment records are photocopies of:

- your Personnel Action form (PAF),
- salary history card (laboratory employees), or
- equivalent online documentation.

If the above employment records are not available, you may submit Payroll Record of Earnings for your temporary employment.

3) Photocopy your form and employment records for your reference.

4) Send the form and employment records to UC HR/Benefits (the address is on the top right of the UBEN 171 form).

Your UBEN 171 form and employment records must be postmarked no later than July 31, 2002, in order to be processed. Requests submitted without supporting employment records will be returned unprocessed.

UCRP Service Credit Adjustment

After reviewing your employment records, UC HR/Benefits will notify you in writing about the results of your request. If you are eligible for a UCRP service credit allocation, UC HR/Benefits will update your UCRP records with the one or two years of UCRP service credit at no cost to you.

Appeal Process

After receiving your UCRP service credit allocation, if you think you are entitled to additional UCRP service credit, you may forfeit your allocation and appeal for a review of your employment records to receive an exact calculation of your temporary service. *Appeal For Service Credit Calculation* on page 7 explains the appeal process.

Questions

If you need help reviewing your records, or if you have questions that are not answered in this booklet, call your local Benefits Office.

Benefits Offices

Location	Phone Number
Berkeley	510-642-7053
San Francisco	415-476-1400
San Francisco Med Center	415-353-4545
Davis	530-752-6512
UCD Med Center	916-734-8099
UCLA	310-794-0830
UCLA Med Center	310-794-0500
Riverside	909-787-4766
San Diego	858-543-2816
UCSD Med Center	619-543-8244
Santa Cruz	831-459-2013
Santa Barbara	805-893-2489
Irvine	949-824-9264
UCI Med Center	714-456-5736
UC Office of the President	510-987-0123
LBNL	510-486-6403
LLNL	925-422-9955
LANL	505-667-1806
ASUCLA	310-825-7055
Hastings College of the Law	415-565-4703

UCRP SERVICE CREDIT ALLOCATION REQUEST

UBEN 171 (6/01) University of California Human Resources and Benefits

This form and photocopies of the required employment records must be postmarked by July 31, 2002, in order to be processed. Requests submitted without employment records will be returned unprocessed.

Send to:
UC HR/Benefits
Allocation/Appeals Unit
P.O. Box 24570
Oakland, CA 94623-1570

1. PERSONAL INFORMATION		
NAME (Last, First, Middle Initial)	SOCIAL SECURITY NUMBER	CAMPUS/LAB
PERMANENT ADDRESS (Number, Street)	EMPLOYEE ID NUMBER	DEPARTMENT
CITY, STATE, ZIP	DAYTIME PHONE ()	HOME PHONE ()

Current UC membership status (check only one): Active UCRP member Retired UCRP member: Retired from UC ___/___/___
 Inactive UCRP member: Separated from UC ___/___/___

2. ELIGIBILITY

Check all that apply:

- 1 I was an active UC employee on 1/1/2001 (includes employees on leave with or without pay)
- 2 My UCRP membership began on or before 12/31/01. My UCRP membership began on MO. ___/YR. ___ (date may be approximate)
- 3 I had a period of temporary UC employment prior to 1/1/01 that lasted at least six consecutive months which is not in a job exempt from this program as explained in the *One-time UCRP Service Credit Allocation Program* booklet.
- 4 My current appointment is not an academic appointment.
- 5 I have not received notice that I was awarded a service credit allocation.
- 6 I did not receive UCRP monthly retirement income or UCRP disability income during my period(s) of temporary employment.

IMPORTANT: If you checked all six boxes above, you may use this form. **If you did not check all six boxes, you are not eligible to request a UCRP service credit allocation under this program.**

3. REQUEST FOR SERVICE CREDIT ALLOCATION

I am requesting an allocation of UCRP service credit. I have attached my employment records (Personnel Action Forms, equivalent online documentation, salary history card (laboratory employees only), or Payroll Record of Earnings) for the periods listed below. I understand that I will have the option of forfeiting this initial allocation and appealing for a calculation of service credit, but only after I have received notice of my initial allocation.

Check one:

- 1 I am requesting an allocation of one year of service credit. The attached documentation verifies my eligible temporary employment of **AT LEAST SIX CONSECUTIVE MONTHS** (regardless of the hours or percentage of time worked) for the period indicated below:

Start Date MO. ___/YR. ___ **End Date** MO. ___/YR. ___

- 2 I am requesting an allocation of two years of service credit. The attached documentation verifies my eligible temporary employment of **MORE THAN twelve CONSECUTIVE MONTHS** (regardless of the hours or percentage of time worked) for the periods indicated below:

Start Date MO. ___/YR. ___ **End Date** MO. ___/YR. ___ **Start Date** MO. ___/YR. ___ **End Date** MO. ___/YR. ___

For purposes of this request, the documentation to verify eligibility is minimal. If, after receiving notice of your service credit allocation, you believe you are entitled to more service credit, you may decide to forfeit the allocation and appeal for a detailed calculation of service credit. If so, you will need to submit Payroll Record of Earnings. **Please keep a photocopy of this form and your supporting documents for your records.**

4. EMPLOYEE SIGNATURE

SIGNATURE	DATE
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FOR INTERNAL USE ONLY

Approved Denied SCA _____ Processor _____ Date ___/___/___

Comments:

ORIGINAL: ALLOCATION/APPEALS UNIT

PRIVACY NOTIFICATIONS

STATE

The State of California Information Practices Act of 1977 (effective July 1, 1978) requires the University to provide the following information to individuals who are asked to supply information about themselves.

The principal purpose for requesting the information on this form is for payment of earnings and for miscellaneous payroll and personnel matters such as, but not limited to, withholding taxes, benefits administration, and changes in title and pay status. University policy and state and federal statutes authorize the maintenance of this information.

Furnishing all information requested on this form is mandatory—failure to provide such information will delay or may even prevent completion of the action for which the form is being filled out. Information furnished on this form may be used by various University departments for payroll and personnel administration, and will be transmitted to the federal and state governments as required by law. (B)

Individuals have the right to review their own records in accordance with University personnel policy and collective bargaining agreements. Information on applicable policies and agreements can be obtained from campus or Office of the President Staff and Academic Personnel Offices.

The official responsible for maintaining the information contained on this form is the Associate Vice President—University of California Human Resources and Benefits, 1111 Franklin Street, Oakland, CA 94607-5200.

FEDERAL

Pursuant to the Federal Privacy Act of 1974, you are hereby notified that disclosure of your Social Security number is mandatory. Disclosure of the Social Security number is required pursuant to sections 6011 and 6051 of Subtitle F of the Internal Revenue Code and with Regulation 4, Section 404.1256, Code of Federal Regulations under Section 218, Title II of the Social Security Act, as amended. The Social Security number is used to verify your identity. The principal uses of the number shall be to report (1) state and federal income taxes withheld, (2) Social Security contributions, (3) state unemployment and Workers' Compensation earnings, and (4) earnings and contributions to participating retirement systems. (BB)

Appeal for Service Credit Calculation

If you have received a UCRP service credit allocation but believe you qualify for more service credit because your temporary employment exceeds your allocation, you have the option to **forfeit** your allocation and appeal for a review of your records.

You must receive an allocation before you appeal under this program. If you have not received an allocation, refer to *Requesting a UCRP Service Credit Allocation* on page 3.

An appeal is treated as a correction of the service credit allocation under this program. UC HR/Benefits will calculate your service credit based upon the employment records you submit. Calculating service credit is a complex process. It is important that you understand how UCRP service credit is determined, since an appeal may result in your receiving less service credit than you were originally allocated. For example, if you received a two-year UCRP service credit allocation, and your appeal shows you are only entitled to 1.3 years of service credit, you will only receive 1.3 years of service credit.

Eligibility

You are eligible to appeal your service credit allocation if your temporary employment:

- occurred before January 1, 2001; and
- totaled more than 1,000 hours on pay status within a twelve-month period.

How UCRP Service Credit is Determined for this Program

The UCRP Membership Qualifier: The first 1,000 hours on pay status

When determining your UCRP service credit under this program, UC HR/Benefits will apply current UCRP membership policies. As of January 1, 2001, a temporary UC employee is eligible for UCRP membership after accruing 1,000 hours on pay status (the UCRP Membership Qualifier) in a 12 consecutive month period. The UCRP Membership Qualifier does not count as UCRP service credit; service credit begins the following month.

UC HR/Benefits will review your Payroll Record of Earnings and count service credit for your regular appointment. This includes paid sick leave, extended sick leave, vacations, compensatory time off, military leave with pay, administrative leave with pay, and holidays. Hours worked for overtime, on-call, shift differential pay, and time in Casual/Restricted and Per Diem positions are not included.

If your employment records show a period of 12 months or more with no pay activity, your subsequent UC appointment(s) must satisfy the 1,000 hour UCRP Membership Qualifier before you accrue additional UCRP service credit.

Counting the 1,000 Hours

The 1,000 hours will be determined by the Payroll Record of Earnings that you submit, as follows:

Full-time (100%) = 8 hours per day

125 paid days at 100% (about six months) = 1,000 hours

Service credit will begin to accrue the first of the month after you reach 1000 hours.

Example 1: Tonia

UCRP qualifier	1/1/97 – 6/30/97 = 6 months @ 100% time = 1032 hours (no service credit)
UCRP service credit begins 7/1/97	7/1/97 – 2/28/98 = 8 months @ 100% time = .6667 years of service credit
	4/1/98 – 2/28/99 = 11 months @ 100% time = .9167 years of service credit
	4/1/99 – 2/29/00 = 11 months @ 100% time = .9167 years of service credit
	= 2.5000 years of service credit

Should Tonia forfeit the allocation she was awarded and appeal for a review of her records?

YES, whether her initial allocation was one or two years. She forfeits the one or two years and ends up with 2.5 years of service credit.

Example 2: Jack (Jack was paid hourly and worked about half time.)

UCRP qualifier	3/1/97 – 2/28/98 = 1056 hours (no service credit)
UCRP service credit begins 3/1/98	3/1/98 – 5/31/98 = 260 hours worked = .1250 years of service credit
	2/1/99 – 12/31/99 = 953 hours = .4582 years of service credit
	= .5832 years service credit

Should Jack forfeit the allocation he was awarded and appeal for a review of his records?

NO, whether his initial allocation was one year or two years. He forfeits the one or two years and receives only .5832 years of service credit.

Example 3: Felicia (The UCRP membership qualifier is applied twice.)

UCRP qualifier	3/1/97 – 8/31/97 = 6 months @ 100% time = 1040 hours (no service credit)
UCRP service credit begins 9/1/97	9/1/97 – 3/31/98 = 7 months @ 100% time = .5833 years of service credit
	4/1/98 – 7/31/99 — Felicia does not work at UC
UCRP qualifier	8/1/99 – 1/31/00 = 6 months @ 100% time = 1040 hours (no service credit)
UCRP service credit begins 2/1/00	2/1/00 – 9/31/00 = 8 months @ 100% time = .6667 years of service credit

Should Felicia forfeit the allocation she was awarded and appeal for a review of her records?

YES, if her initial allocation was one year. She forfeits the one year and ends up with 1.2500 years of service credit.

NO, if her initial allocation was two years. She forfeits the two years and ends up with only 1.2500 years of service credit.

$$\begin{array}{r} .5833 \\ + .6667 \\ \hline = 1.2500 \end{array}$$

How to Appeal your Allocation

1) Complete the attached UBEN 172 form (UCRP Service Credit Allocation Appeal form).

On the form, indicate your temporary UC employment periods prior to January 1, 2001. Your appeal is based on the periods you specify and the Payroll Record of Earnings you provide.

2) Obtain your Payroll Record of Earnings.

Contact your local Benefits Office to find out how to obtain your Payroll Record of Earnings. Benefits Office telephone numbers are listed on page 10.

Note: your local Benefits Office cannot calculate your service credit; service credit will be calculated at UC HR/Benefits.

3) Review your Payroll Record of Earnings.

Review your employment records carefully to verify that submitting an appeal will not result in your receiving less service credit than you were allocated. UC HR/Benefits will apply current UCRP membership rules in calculating your service credit. See *How UCRP Service Credit is Determined for this Program* on page 7.

4) Send the form and employment records to UC/HR Benefits (address is on top right of form). Keep photocopies for your records.

Your UBEN 172 form and employment records must be postmarked no later than July 31, 2002 in order to be processed. Appeals submitted without supporting employment records will be returned unprocessed.

UCRP Entry Date:

UCRP service credit allocated or purchased under this program will not alter your entry date into UCRP.

The Results of an Appeal

UC HR/Benefits will notify you in writing after your appeal has been processed and will update your UCRP service credit.

The results of your appeal are treated differently depending on when your temporary employment occurred.

If Your Temporary Employment Occurred November 1990 and Later:

UCRP service credit for temporary employment after November 1990 is credited to your records at no cost to you.

If Your Temporary Employment Occurred Before November 1990:

If you had temporary employment before November 1990, you will receive up to two years of service credit free of cost. You will be given the option to purchase any pre-November 1990 service credit that exceeds two years. UC HR/Benefits will send written notification to inform you of the service credit available for purchase, the cost, and the payment options.

If You Do Not Purchase Service Credit

Your UCRP records will be updated to reflect the service credit that is available to you at no cost (the service credit allocation and your service credit for any post-November 1990 temporary employment).

If You Purchase Service Credit

If you elect to purchase the service credit, your election is irrevocable. The pre-November 1990 service credit will be applied to your UCRP record after your payments are completed.

If you leave University employment before completing the payments, you will receive proportionate service credit. No payments will be refunded.

UCRP Service Credit Purchase

The cost for purchasing the additional pre-November 1990 service credit which exceeds the two-year service credit allocation is determined according to the following formula:

$$\begin{array}{r}
 \text{(months of service credit)} \\
 \times \quad 2\% \text{ (employee contribution rate)} \\
 \times \quad \text{(employee's current covered} \\
 \quad \text{compensation)} \\
 \hline
 + \text{ interest} = \text{cost of purchasing} \\
 \quad \text{service credit}
 \end{array}$$

Covered compensation is the gross monthly pay that an active member receives from the University for a regular and normal appointment. For a list of what is not included in covered compensation, refer to the appropriate University of California Retirement Plan Summary Plan Description for your classification. Summary Plan Descriptions are available from UCbencom (www.ucop.edu/bencom) and local Benefits Offices.

Interest will be added to the cost based upon the length of the payment period you selected. Interest is computed using the Plan's assumed earnings rate at the time of your purchase (currently 7.5%).

If there is cost involved with your appeal, UC/HR Benefits will send you detailed information about the payment schedule and the cost for UCRP service credit after processing your appeal.

The following example explains the formula used to calculate the cost of service credit.

Example 4: Lindsey, who earns \$3,000 per month in covered compensation, received a one-year UCRP service credit allocation. Her appeal confirmed she was eligible for 36 months of pre-November 1990 UCRP service credit. The first two years of service credit are free of cost. The following calculation would apply:

$$\begin{array}{r}
 12 \text{ (months of service credit)} \\
 \times \quad 2\% \text{ (employee contribution rate)} \\
 \times \$3,000 \text{ (employee's current covered compensation)} \\
 \hline
 \$720 + \text{ interest} = \text{cost of purchasing service credit}
 \end{array}$$

Campus Benefits Offices Contact List

Below is a list of telephone numbers for Benefits Offices. Contact your Benefits Office to find out how to obtain copies of your Payroll Record of Earnings required to appeal a UCRP service credit allocation.

Benefits Offices

Location	Phone Number
Berkeley	510-642-7053
San Francisco	415-476-1400
San Francisco Med Center	415-353-4545
Davis	530-752-6512
UCD Med Center	916-734-8099
UCLA	310-794-0830
UCLA Med Center	310-794-0500
Riverside	909-787-4766
San Diego	858-534-2816
UCSD Med Center	619-543-8244
Santa Cruz	831-459-2013
Santa Barbara	805-893-2489
Irvine	949-824-9264
UCI Med Center	714-456-5736
UC Office of the President	510-987-0123
LBNL	510-486-6403
LLNL	925-422-9955
LANL	505-667-1806
ASUCLA	310-825-7055
Hastings College of the Law	415-565-4703

Reviewing Your Employment Records for the Appeal Process

A Payroll Record of Earnings provides the historical information needed to support your appeal. Each Payroll Record of Earnings may contain multiple periods of employment, and UC HR/Benefits will review each entry to determine your applicable UCRP service credit.

If your appointment(s) satisfies all of the requirements below, the hours listed on your Payroll Record of Earnings will be applied toward your UCRP Membership Qualifier (see page 7) and considered in determining UCRP service credit for this program.

For the purpose of this program, UC will look at the following entries on your records:

Description of Service (DOS):

Hours in a regular pay category will be counted in this program. Regular pay is usually coded “Reg” on Payroll Record of Earnings. Overtime, on-call hours, and shift differential are not regular pay and will not be counted in this program.

Title Code (TITLE CODE):

UC HR/Benefits will review your title codes to determine if your temporary employment was in a UCRP-eligible position. Only hours in UCRP-eligible positions will be counted for this program. See *Employment Exempt from this Program* on page 2. If you are unsure whether your title codes are eligible for this program, consult your Benefits Office at the time you receive your Payroll Record of Earnings.

Hours on pay status or percentage on pay status (HRS/PRCT):

UC HR/Benefits uses this information to determine the amount of service credit. This section contains either the number of hours on pay status or the percentage of time on pay status during a particular month.

Hours on pay status

If your record lists your hours on pay status, your Payroll Record of Earnings will contain a number with the last two digits indicating the fraction of hours you worked during the period.

For example, if your record shows 17400, you worked 174 full hours for this period. If the code was 1250, you had 12 ½ hours for this period.

Percentage of time on pay status

If your appointment was for a percentage of time on pay status, your Payroll Record of Earnings will list a percentage. For example, 9094% would equal 90.94% time on pay status, which means you worked a little less than 91% of the total eligible work hours for the month.

UC HR/benefits will calculate the service credit for each month of your temporary employment by multiplying the percentage of eligible hours you worked by the total working hours in the month. The total working hours vary from month to month. (Contact your department for additional information.)

Example: Percentage of time on pay status converted to hours on pay status.

90.94% (The member’s monthly percentage of time on pay status)

x 184 (The total eligible work hours in that month)

90.94% x 184 = 167.33 hours

Period End Date (PEREND):

This section shows the end date of your pay period. To be eligible to participate in this program, the end date for any eligible pay period must be before January 1, 2001.

Student Status (STUDENT STAT):

Only Student Status codes of 1, 2, and 5 are eligible for this program. These status codes indicate that you were not a registered student.

1

2

3

4

5

UCRP SERVICE CREDIT ALLOCATION APPEAL
UBEN 172 (6/01) University of California Human Resources and Benefits

Send to:
 UC HR/Benefits
 Allocation/Appeals Unit
 P.O. Box 24570
 Oakland, CA 94623-1570

If you received a UCRP service credit allocation but believe you qualify for more service credit use this form to forfeit your allocation and appeal for a review of your records.

1. PERSONAL INFORMATION		
NAME (Last, First, Middle Initial)	SOCIAL SECURITY NUMBER	CAMPUS/LAB
PERMANENT ADDRESS (Number, Street)	EMPLOYEE ID NUMBER	DEPARTMENT
CITY, STATE, ZIP	DAYTIME PHONE ()	HOME PHONE ()

Current UC membership status (check only one): Active UCRP member Retired UCRP member: Retired from UC ___/___/___
 Inactive UCRP member: Separated from UC ___/___/___

2. ELIGIBILITY

Check all that apply:

- 1 I have received notice that I was awarded a service credit allocation.
- 2 My temporary UC employment prior to 1/1/01 totaled more than 1,000 hours on pay status during a 12-month period.
- 3 My temporary employment was not exempt from this program as explained in the *One-time UCRP Service Credit Allocation Program* booklet.
- 4 My current UC appointment is not an academic appointment.
- 5 I did not receive UCRP monthly retirement income or UCRP disability income during my period(s) of temporary employment.

IMPORTANT: If you checked all five boxes above, you may use this form. **If you did not check all five boxes, you are not eligible to appeal your UCRP service credit allocation under this program.**

3. APPEALING YOUR SERVICE CREDIT ALLOCATION (If you need additional space, use a photocopy of this form as a second page)

I am forfeiting the UCRP service credit allocation I received to request a review of my service credit records based on the employment periods listed below. I have attached a Payroll Record of Earnings for all periods indicated.

From: ___/___/___	To: ___/___/___	From: ___/___/___	To: ___/___/___
From: ___/___/___	To: ___/___/___	From: ___/___/___	To: ___/___/___
From: ___/___/___	To: ___/___/___	From: ___/___/___	To: ___/___/___

4. EMPLOYEE SIGNATURE

By submitting this form, I agree to the following terms. I understand that:

- **By submitting this appeal, I forfeit my one-time UCRP service credit allocation.**
- UCRP service credit for my temporary employment will be based on the periods shown in section 3 above and for which appropriate documentation is attached.
- UC HR/Benefits will review my records, calculate the time I worked in temporary UC employment eligible for this program, and adjust my UCRP service credit accordingly.
- Submitting this appeal may result in my receiving less service credit than I was originally allocated.
- Current UC policies will be used to determine my UCRP service credit; UC HR/Benefits will not allocate service credit for employment excluded from this program.
- UCRP service credit for this program counts only after I have accumulated 1,000 hours on pay status in a consecutive 12-month period.
- The results of my appeal are considered final and I may not contest the results of the appeal.

SIGNATURE _____ DATE _____

This form and required documentation must be postmarked by July 31, 2002, in order to be processed. Forms submitted without employment records will be returned unprocessed. **Please keep a photocopy of this form and your supporting documents for your records.**

FOR INTERNAL USE ONLY

Approved Denied SCA _____ Processor _____ Date ___/___/___
 Comments:

PRIVACY NOTIFICATIONS

STATE

The State of California Information Practices Act of 1977 (effective July 1, 1978) requires the University to provide the following information to individuals who are asked to supply information about themselves.

The principal purpose for requesting the information on this form is for payment of earnings and for miscellaneous payroll and personnel matters such as, but not limited to, withholding taxes, benefits administration, and changes in title and pay status. University policy and state and federal statutes authorize the maintenance of this information.

Furnishing all information requested on this form is mandatory—failure to provide such information will delay or may even prevent completion of the action for which the form is being filled out. Information furnished on this form may be used by various University departments for payroll and personnel administration, and will be transmitted to the federal and state governments as required by law. (B)

Individuals have the right to review their own records in accordance with University personnel policy and collective bargaining agreements. Information on applicable policies and agreements can be obtained from campus or Office of the President Staff and Academic Personnel Offices.

The official responsible for maintaining the information contained on this form is the Associate Vice President—University of California Human Resources and Benefits, 1111 Franklin Street, Oakland, CA 94607-5200.

FEDERAL

Pursuant to the Federal Privacy Act of 1974, you are hereby notified that disclosure of your Social Security number is mandatory. Disclosure of the Social Security number is required pursuant to sections 6011 and 6051 of Subtitle F of the Internal Revenue Code and with Regulation 4, Section 404.1256, Code of Federal Regulations under Section 218, Title II of the Social Security Act, as amended. The Social Security number is used to verify your identity. The principal uses of the number shall be to report (1) state and federal income taxes withheld, (2) Social Security contributions, (3) state unemployment and Workers' Compensation earnings, and (4) earnings and contributions to participating retirement systems. (BB)

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.

The Consolidated Omnibus Budget Reconciliation Act of 1985 (COBRA) provides for continued coverage for a certain period of time at applicable monthly COBRA rates if you, your spouse, or your dependents lose group medical, dental, or vision coverage because you terminate employment (for reasons other than gross misconduct); your work hours are reduced below the eligible status for these benefits; you die, divorce, or are legally separated; or a child ceases to be an eligible dependent. Note: The continuation period is calculated from the earliest of these qualifying events and runs concurrently with any other UC options for continued coverage. See your Benefits Representative 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.



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