

## BELI Status Qualifier Codes

This supplement describes Qualified Status situations which affect an employee's benefits eligibility. These situations should be identified by use of the following BELI Status Qualifier Codes:

- 10 – Appointee with Ending Date for Funding Purposes Only
- 20 – Average Appointment Percent Employee (Academic)
- 30 – Extended Sick Leave Recipient
- 40 – Employee Rehabilitation (Formally Approved)
- 50 – Split Student/Non-Student Appointee Ineligible for Benefits
- 60 – Seasonal Employee
- 70 – Phased Retiree
- 80 – “Grandfathered Employee”
- 90 – Sabbatical/Leave for Professional Renewal

## Background

The following applies to coverage with ongoing eligibility and reenrollment requirements: Medical, Dental, Optical, University-paid Life Insurance, and University-paid and Employee-paid Disability Insurance. It does not apply to Employee-paid Life Insurance, Accidental Death and Dismemberment, Legal, or DepCare.

Please note that BELI Status Qualifier Codes are used in addition to the BELI code itself. Also, two status qualifier codes may be used if two qualifying conditions apply. The Primary Qualifier Code would apply to the condition which will last longest and the Secondary Qualifier Code may be used if another condition applies temporarily. For example, assume a “grandfathered” employee who is member of the retirement plan also has an ending date for funding purposes only. The BELI would be “1”; the Primary Qualifier Code would be 80 and the Secondary Qualifier Code would be 10.

Codes should be entered when a qualifying condition exists and deleted when the condition no longer applies. To add status qualifier codes, use the appropriate form to assign the Primary Code (and the Secondary Code, if needed). To delete a status qualifier code, write an asterisk into the boxes on the form for the code being deleted and the associated date (either Primary Qual. Code and Primary Qual. Date or Secondary Qual. Code and Secondary Qual. Date or both). If there are Primary and Secondary codes and the Primary Code is deleted, the Secondary Code should be reentered as the Primary Code.

Descriptions of how to use the BELI Status Qualifier codes are grouped as follows:

- 1) the code establishes initial eligibility, but the employee must meet ongoing minimum appointment/average regular paid time requirements (codes 10, 20, 80); or
- 2) the code continues eligibility even if the appointment/average regular paid time fall below minimums (codes 30, 40, 70, 90); or
- 3) the code indicates the employee is ineligible for benefits (codes 50 and 60).

## Qualified Status – Establishes Initial Eligibility

### **Appointee with Ending Date for Funding Purposes Only – 10**

When a person is appointed for at least 50% time and the Personnel Action Form indicates that the ending date is for funding purposes only, Career benefits or Limited Career benefits should be available. A BELI code of 1 or 2 should be assigned, along with a BELI Status Qualifier Code of 10. The person must meet ongoing requirements for minimum appointment level and average regular paid time to remain in the benefits plans. The status qualifier should be deleted if the employee is reappointed for an indefinite period or for one year or more, or if an ending date is assigned which reflects the termination of the appointment.

**Average Appointment Percent Employee (Academic) – 20** An academic year appointment (July 1 through June 30) with different levels of percent time (greater than zero) in each quarter or semester should be treated as a variable time appointment and welfare benefits eligibility based on the average percent time for the total year's appointment. **Averaging the appointment does not affect UCRP eligibility.**

If the appointment is made for two or more years, each year (July 1 through June 30) should be averaged individually with benefits for the year based on the average for that year.

The manager should assign BELI consistent with the average level of the appointment for the academic year. (July 1 through June 30).

If the employment commitment is quarter-by-quarter, the initial appointment for the fall quarter must be evaluated separately with additional appointments treated as show in Administrative Supplement No. 2.

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**Example 1:** 7/1/90 through 6/30/91 (one year)

Quarter	Percent	Annual Average	Assigned BELI
Fall	33%		
Winter	100%		
Spring	67%	67%	2 (Limited Career)

Because the average is over 50% for the year, this person will be eligible for Career medical, UC-paid Core and employee-paid life insurance, accident insurance, and DepCare. Averaging does not apply to UCRP, so this person will not be eligible for dental, optical, disability or legal insurance.

**Example 2:** 7/1/90 through 6/30/91 appointment (one year)

Quarter	Percent	Annual Average	Assigned BELI
Fall	100%		
Winter	16%		
Spring	16%	44%	4 (Core)

**Example 3:** 7/1/89 through 6/30/91 appointment (two years)

	Quarter	Percent	Annual Average	Assigned BELI
(1 <sup>st</sup> year)	Fall 89	50%		
	Winter	100%		
	Spring	16%	55%	2 (Limited Career)

Since one of the quarters is below 50%, there is no UCRP eligibility, so the BELI code is 2 for this initial appointment. This person is eligible for Career medical, UC-paid Core and employee-paid life insurance, accident insurance, and DepCare.

(2 <sup>nd</sup> year)	Fall 90	16%		
	Winter	100%		
	Spring	16%	44%	4 (Core)

This second year appointment is evaluated separately and a BELI code of 4 assigned, since the average is below 50%, but above 43.75%. This person must be disenrolled from Career medical coverage and transferred to the Core medical plan. Employee-paid life and accident insurance, and DepCare participation will not be affected.

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**Example 4:** 7/1/90 through 6/30/91 appointment (one year)

Quarter	Percent	Annual Average	Assigned BELI
Fall	50%		
Winter	100%		
Spring	67%	72%	1 (Career)

Since each quarter's appointment is at least 50%, this person is eligible for UCRP membership and, thus, for all welfare benefits

**Example 5:** 7/1/89 through 6/30/91 appointment (two years)

	Quarter	Percent	Annual Average	Assigned BELI
(1 <sup>st</sup> year)	Fall 89	67%		
	Winter	100%		
	Spring	50%	72%	1 (Career)
Since each quarter's appointment is at least 50%, this person is eligible for UCRP membership and, thus, for all welfare benefits.				
	Fall 90	16%		
	Winter	100%		
	Spring	16%	44%	4 (Core)
This second year appointment is evaluated separately and a BELI code of 4 assigned since the average is below 50%, but above 43.5%. PLEASE NOTE: UCRP membership is not affected by the average and will continue. However, since the average is below 50%, this person must be disenrolled from dental, disability and optical coverage and transferred from UC-paid Career to UC-paid Core life insurance even through UCRP membership continues. This person also must be disenrolled from Career medical coverage. DepCare, legal and employee-paid life and accident insurance will not be affected.				

**“Grandfathered Employee” – 80** This applies to a limited number of employees who were enrolled in medical, dental, or optical coverage at the time the BELI system was implemented and who otherwise would have been transferred to Core plans on January 1, 1990. To be eligible, an employee must have:

- been enrolled in the plan before December 31, 1988;
- had an appointment of at least 43.75% on January 1, 1989;
- had an average regular paid time of at least 17.5 hours on January 1, 1989;
- continuously maintained a minimum appointment of 43.75% time and average regular paid time of 17.5 hours since January 1, 1989.

Status code 80 should be assigned in addition to BELI code 1 or 2.

If a “grandfathered” employee’s time falls below 17.5 hours or the appointment level is reduced below 43.75%, eligibility for this special status ends and the person must meet the same requirements as any other employee for benefits eligibility. Termination of employment or a break in service also ends eligibility for the “grandfather” status.

This provision applies only to employees who would have been transferred from Career to Core coverage January 1, 1990; it does not apply to anyone in this situation after that date.

The “grandfather” status only applies to medical, dental, and optical coverage; it does not apply to University-paid life insurance or to University-paid or employee-paid disability coverage.

## Qualified Status – Benefits Are Retained

In the following situations, benefits in effect before the Qualified Status continue. This applies even if the employee’s appointment/average regular paid time falls below the required minimums. The assigned BELI in effect before the Qualified Status period begins shall not be changed.

**Extended Sick Leave Recipient – 30** While on extended sick leave (80% of regular pay) for a work-related disability covered by Workers’ Compensation, an employee may continue benefits up to the six-month maximum period for extended sick leave. If 80% of the normal pay status results in an appointment below 50% time, the special status code of 30 should be assigned. It should be deleted at the end of six months or when the employee’s appointment returns to 50% time or more – whichever is earlier.

**Employee on Rehabilitation (formally approved) – 40** Campus and laboratory officials may approve continuation of benefits during a period of formally approved rehabilitation for up to six months. The special status code of 40 should be assigned at the beginning of the rehabilitation period and deleted at the end of the period.

In this context, rehabilitation refers to an employee who has returned to work part-time at the University as part of a formally approved plan and whose time worked is such that benefits would otherwise be lost during the rehabilitation attempt. For example, the approved plan might consist of one month at 25% time, two months at 40% and subsequent periods at 50% or more time. To avoid loss of benefits while the approved plan calls for 25% and 40% employment, the status qualifier code is appropriate.

Note: Continued benefits for both extended sick leave and special rehabilitation cannot exceed a combined total period of six months.

**Phased Retiree – 70** Phased Retirees may continue medical, dental, optical and University-paid life insurance during the period of the phased retirement agreement so long as the paychecks are large enough to cover any required deductions and, where membership in the University-sponsored defined benefit plan is required, earnings are covered by the plan. Phased retirees with appointments of less than 50% time or with average regular paid time of less than 20 hours per week are not eligible to continue University or Employee-paid Disability.

If the appointment level of the phased agreement is less than 50% time, status code 70 should be assigned. It should be deleted at the end of the phased period.

**Sabbaticals/Leave for Professional Renewal – 90** Faculty or staff enrolled in medical, dental, optical and/or University-paid Career or Core life insurance who go on sabbatical leave or leave for professional renewal at reduced pay may continue these coverages for up to 24 months so long as their paychecks cover any required deductions. For dental, optical and University-paid Career life insurance, earnings during the leave also must be covered compensations for retirement plan purposes.

If the leave will be at less than 50% time, status code 90 should be assigned at the beginning of the period and deleted at the end of the period or at the end of 24 months from the date the leave originally began, whichever is earlier.

## Qualified Status – Benefits are Blocked

**Split Student/Non-Student Appointee Ineligible for Benefits – 50** If any of an employee's appointments are casual/restricted or are in titles restricted to students (Class Title Outline 400-499), the employee is ineligible for benefits, regardless of the nature of the other appointments. Status code 50 should be assigned in addition to the BELI code. The special status code should be deleted if the employee transfers to a non-student position.

**Seasonal Employees – 60** Individuals who work seasonally each year for less than three months (e.g., agricultural workers) may be excluded from Core benefits. Seasonal employees typically are hired around the same time each year on a temporary basis. The seasonal employee category does not apply to someone who has a series of short terms appointments, with or without breaks in service, during the year.

Status code 60 should be assigned in addition to the BELI code. The special status code should be deleted if the employee transfers to a non-seasonal position.