

Post-Employment Benefits Task Force to Send Recommendations to President Yudof

Predictable but reduced UC contributions for retiree health premiums and changes in eligibility for retiree health benefits for many future UC retirees are among the options the Post Employment Benefits Task Force is considering sending to UC President Mark G. Yudof.

After more than a year of study, discussion and wide consultation, the task force is now completing its work, and plans to send its report recommendations for changes to the UC Retirement Plan, retiree health benefits and funding of the pension and retiree health benefits to Yudof by early August.

The task force has been charged with developing options for balancing the long-term costs of post-employment benefits with the need to be competitive.

“Our focus has been on how to sustain these benefits,” said Randy Scott, executive director of talent management and workforce development and UC staff lead on the project.

The greatest impact on current retirees is likely to be predictable and scheduled phased-in reductions in the level of UC’s contribution to retiree health premiums from the current average of 89 percent.



Dr. Charles Hess, former chair of the Council of UC Emeriti Associations and chair of the task force retiree health benefits work group, points out that UC’s retiree health benefits are higher than those of comparable universities. “The University of Michigan is in the process of doing what we’re discussing—decreasing contributions to retiree health.”

The task force is also considering recommendations to mitigate the effect on retirees who might be more adversely affected, said Hess. This includes, for example, those who are under age 65 and not yet eligible for Medicare and a smaller group, 65 and older who were not coordinated with Social Security and are not otherwise eligible for Medicare.

“Retirees over 65 not eligible for Medicare have saved the university money over the years because UC did not pay into Social Security for them,” said Scott. “The retiree health work

continued on page 6

Retirees play important role on task force



As chairs of the Council of UC Emeriti Associations and Retiree Associations respectively, Charles Hess and Marian Gade have represented retirees’ interests and viewpoints on the Post-Employment Benefits Task Force. Hess chairs the retiree health work group and Gade is a member of the pension work group.

Hess, professor emeritus at UC Davis, wound up chairing the retiree health work group when the original chair, Lawrence Pitts, was named interim University provost and chair of the task force steering committee. As work group chair, Hess also sits on the steering committee. “I’ve enjoyed and appreciated the role because I could see what was happening to the work group’s recommendations and serve as an advocate for those things we felt were important to retirees and UC,” he said.

Gade, retired deputy director of

continued on page 4

Health Care Reform's Effect on UC's Medical Plans

Since President Obama signed the Patient Protection and Affordable Care Act and the Health Care Education Reconciliation Act in March, UC retirees have been asking questions about how the health care reform laws will affect their UC-sponsored medical insurance. Mark Esteban, director of benefits programs in UC Human Resources, talks about the law and its impact on UC's benefits.



Overall, what impact do you see the health care reform laws having on UC's medical benefits?

We've been ahead of the curve on many of the provisions in the law, so we will have to take relatively small steps to get into compliance. We are in a much better position regarding benefits that are mandatory under the law than a lot of other employers. For example, our HMO plans already have no lifetime limits on benefits, and we already cover all of the mandated benefits. At the same time, some of the steps we will need to take—such as covering children up to age 26—could have significant financial implications.

There has been particular interest in the provision extending medical coverage to adult children to age 26. How and when will retirees be able to take advantage of this provision?

UC will be fully implementing this provision for 2011, the details will be available in our Open Enrollment information in October. At this point, there are nearly as many questions as answers in terms of how "adult child" will be defined. All employers are waiting for regulatory guidance and definitions that will come out of the U.S. Department of Health and Human Services. This provision also has tax implications.

The IRS has confirmed that coverage extended to an adult child to age 26 will not be treated as taxable income to the employee or the child.

We do know a few other details. For example, the employee's married child will be eligible for coverage, which is a change. But the child's spouse or domestic partner and/or children will not be eligible, which is consistent with current law. If the adult child is eligible for employer-sponsored coverage elsewhere, he/she would not be eligible for coverage under the parent's plan. Also, the adult child does not need to be a tax dependent.

It is still unclear when coverage of the adult child ends. The tax code says the child can get health care tax-free through the end of the year in which he or she turns age 26, but the health care reform law says coverage is required to last through the end of the month in which the child turns 26.

The cost of this provision for UC's plans is also unclear. Although this population is generally healthy, adding more people to the plan will increase our costs.

Do any of the Medicare provisions of the law affect UC or our retirees?

Medicare benefits remain fully intact for retirees. That being said, we do need to assess how federal fund-

ing reductions for Medicare Advantage plans will affect premiums for UC's Health Net Seniority Plus and Kaiser Senior Advantage plans. Historically, UC has covered the full cost of these plans, so our retirees have not had to pay a premium. Many factors outside the health care reform law will determine UC's costs and contribution to the premium, and hence retirees' costs. More information about the rates and other impacts will be available as we approach Open Enrollment in the fall.

The law mandates coverage for certain essential benefits. Will UC be adding benefits to its plans to comply?

While these requirements may apply only to certain UC plans, this is one of the areas where we're ahead of the curve. Our plans already cover most of the mandated benefits including mental health and substance abuse services, prescription drugs, rehabilitative services and devices, preventive and wellness services and chronic disease management.

The new law requires health plans to provide immediate access for people with pre-existing conditions. Has UC implemented that?

Again, we're ahead of the curve regarding this provision. Our health plans have not excluded employees or their dependents with pre-existing conditions for many years.

Are there any other provisions that could affect costs for UC or retirees?

There are two areas that could affect UC: the elimination of lifetime benefit limits and provisions regarding reimbursement for early retiree medical expenses.

The elimination of lifetime limits on benefits could affect people

enrolled in our Anthem Blue Cross Plans or the CIGNA Choice Fund Plan that currently have lifetime limits. As we go through the renewal process with our carriers over the next few months, we will know the cost of eliminating the limits. It could have an impact on premium rates. Our HMO plans (Kaiser, Health Net and WHA) don't have lifetime limits, so they should not be affected.

The Early Retiree Reinsurance Program provides \$5 billion to help offset the costs of certain health benefits provided to retirees, age 55 or older not eligible for Medicare, and their dependents. The temporary program reimburses participating

employment-based plans—not the retirees themselves—for 80 percent of the costs of qualifying benefits provided in excess of \$15,000 and below \$90,000. Reimbursements must be used to reduce plan participant or plan sponsor costs, or any combination of these costs. For example, the reimbursement could be used to mitigate any increases in UC's future premium costs. The University recently submitted its application to the program.

When will retirees hear more about the law's effect on UC's plans?

Anything that affects our plans for 2011 will be included in our Open

Enrollment communications in the fall. We'll also continue to keep people informed through New Dimensions, the At Your Service website and your local Human Resources and Benefits Offices. ➤

The articles on pages 2 and 3 do not apply to Los Alamos National Laboratory and Lawrence Livermore National Laboratory retirees. For more information on LANL and LLNL retiree health and welfare benefits, contact Hewitt Associates (LANL: 1-866-934-1200; LLNL: 1-866-994-5567).

Tips for using your health benefits while vacationing

Going on vacation? Your UC health benefits travel with you. While we hope you do not need medical care, here are a few tips to help you, just in case.

Before you leave on vacation

- If you take medications, make sure you have enough for your trip. You may want to request an additional supply for your vacation or check whether you can use your plan's retail or mail order pharmacy while you're away.
- Carry medications in their original container, and keep them with you—not packed away in a suitcase that could be lost.
- Keep your health insurance card in your wallet and put a copy in your suitcase, in case your wallet is lost or stolen.
- Visit your plan's website for travel information; some medical plans have travel kits.

- Check with your medical plan about an urgent care center in your vacation area. Many centers have doctors, nurses and x-ray facilities on site, and they cost less than an emergency room visit.

While you are away

- In the U.S., always call 911 if you need immediate medical care.
- Medical plan nurse advice lines are available 24 hours a day, seven days a week; call them for medical advice and guidance.
- UC's dental plans cover the cost of emergency and office visits for pain relief.
- All of the medical plans have toll-free numbers you can call if you have questions; the number is on the back of your health insurance card.
- If you're in Health Net, Kaiser Permanente, Western Health

Advantage or the Anthem Blue Cross PLUS plan and you get emergency treatment, call your plan or primary care provider as soon as possible to report the emergency.

If you travel outside the U.S.

- All UC-sponsored medical plans cover emergencies. Generally, you will need to pay for the care at the time you receive services and then file a claim for reimbursement. Be sure to call your plan as soon as possible to report the emergency care.
- Be sure you know how to contact your medical plan. Depending upon your vacation site, UC plans may have international toll-free numbers or you can call collect. Visit your plan's website and booklet for information on coverage while traveling overseas. ➤

Retirees Role continued from page 1

the Center in Higher Education at UC Berkeley, sees their inclusion on the task force as an important recognition of the role retirees can play in the University, a role that she says has been evolving over the past few years. "I've always felt that retirees and emeriti can do some good for the university."

Both Gade and Hess say they learned a great deal about the complexity of benefits and how they are determined. And, they were deeply impressed by the concern of both Office of the President staff and fellow task force members for the welfare of faculty, staff, retirees and the University. "I think it's been an honest process, and the people on the task force have been concerned about the totality of the problem," said Gade.

Hess agrees. "I'm not a proponent of cutting benefits," he said. "But in order for the University to be the best system for teaching, research and service, some unpleasant decisions need to be made. I think they will be made with sensitivity and a sense of fairness." 🐾

Stay Informed

You can learn more about the work of the Post-Employment Benefits Task Force and keep up with the latest news by:

- Visiting the Task Force website (www.universityofcalifornia.edu/ucrpfuture/emp_task.html)
- Contacting your local retiree/emeriti association (see page 7 for contact information)
- Listening to Regents' discussions of Task Force recommendations. See the Regents website (www.universityofcalifornia.edu/regents/meetings.html) for meeting dates, agendas, and links to live webcasts of the meetings.

UC adopts new rules for minimum required distributions

The University has updated its policies for minimum required distributions (MRDs) to ensure that UC's Retirement Savings Program continues to comply with IRS rules regarding MRDs.

UC retirees must begin receiving minimum required distributions by the end of the calendar year when they turn 70½, unless they choose to defer payment until the following April.

UCRP participants who have never received an MRD, and who have a regular UC-paid post-retirement appointment, may defer MRD payments until the year their current appointment ends, or the following April. UCRP participants with unpaid appointments do not qualify for the deferral.

The new UC policies are effective beginning with the 2010 tax year. UCRP participants who have suspended their MRDs and currently hold an eligible UC-paid appointment will

be allowed to continue the suspension until their current appointment ends. Under the new policies, however, once MRDs start, or restart, UCRP participants may no longer suspend them, regardless of future employment at UC.

In June, Fidelity Retirement Services mailed an information packet and notice to all participants required to take MRDs in 2010. In the future, the information packet and notice will be mailed to participants newly required to start MRDs. The MRD payments will be distributed in December of the same year unless the participants choose other options with Fidelity Retirement Services.

If you have any questions about your MRD, call Fidelity Retirement Services at 1-866-682-7787. Retirement Services Specialists are available Monday through Friday from 5:00 a.m. to 9:00 p.m. PT to assist you. 🐾

Rollovers into Retirement Savings Can Benefit Retirees

Did you know that UC retirees can now roll other retirement accounts into their UC Retirement Saving Program accounts even after you've retired?

In general, the UC 403(b) and 457(b) Plans allow rollovers of pretax and after-tax amounts from 401(a), 401(k), other 403(b) plans, traditional IRAs and 457(b) governmental plans.

Besides the benefits of simplicity, convenience and continued tax advantages, you may be able to reduce the fees you are paying. If you invest through multiple providers, you might be paying more fees than necessary. Under the UC Retirement

Savings Program, you pay no annual participant account fee, and the UC Core Funds are designed to carry lower expenses than many similar publicly traded mutual funds.

You also may have more control of your overall portfolio if your investments are in one place. It's easier to see your complete financial picture and gives you a better chance of catching overlap and improving your portfolio's diversification.

To learn more about rolling other retirement accounts into the UC Retirement Savings Program, call Fidelity Retirement Services at 1-866-328-6608. 🐾

UC and Fidelity offer financial education just for retirees

Fidelity Retirement Services has joined with UC during August and September to offer two financial education workshops and help desk services especially for UC retirees. Take advantage of these free services to learn more about your UC Retirement Savings Plans. Here's the schedule:

Creating a Plan for Lifetime Income in Retirement

Learn how to create a retirement income plan, assess financial risks in retirement and take advantage of UC Retirement Savings Program tools and resources.

BERKELEY *

- 9:30 a.m., August 6 and August 19, University Hall Rm. 150

DAVIS *

- 1 p.m., August 25, Memorial Union Bldg, Garrison Rm.

IRVINE*

- 10:15 a.m., August 20, 111 Theory, HR Training Rm.

UCLA **

- 11 a.m. August 9 and 10 a.m., August 16, Belmont Village Westwood, 10475 Wilshire Blvd

RIVERSIDE *

- 10 a.m. and 2:05 p.m., August 10, Education Development Center

SAN DIEGO***

- 11 a.m., September 9, UCSD Retiree Center

SAN DIEGO MEDICAL CENTER*

- 11:15 a.m., August 18, Hillcrest: Camelot, 132 Dickinson St. San Diego

SAN FRANCISCO *

- 9 a.m., August 5, Mission Bay, GH Auditorium
- 8 a.m., August 12, Parnassus N-217

SANTA BARBARA*

- 9:00 a.m. and 1:00 p.m., August 5, Human Resources Learning Center

SANTA CRUZ *

- 9 a.m., August 10, 1201 Shaffer Rd., Staff HR Training Rm.

Accessing Your Account Online

Learn more about using online tools for managing UC Retirement Savings Program investments.

BERKELEY *

- 11 a.m., August 6 and August 19, University Hall Rm. 150

DAVIS *

- 11:30 a.m., August 25, Memorial Union Bldg, Garrison Rm.

IRVINE*

- 11:30 a.m., August 20, 111 Theory, HR Training Rm.

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- 9:30 a.m., August 12, Parnassus N-217

SANTA BARBARA*

- 10:05 a.m. and 2:05 p.m., August 5, Human Resources Learning Center

SANTA CRUZ *

- 10:30 a.m., August 10, 1201 Shaffer Rd., Staff HR Training Rm.

Help Desk

Stop by and ask a Fidelity Retirement Services counselor general questions about the UC Retirement Savings Program and gather educational materials. No appointment is necessary.

BERKELEY

- 12:00 to 1:00 pm, August 6 and August 19, University Hall Rm. 150
- 2 to 4 p.m., August 6 and 19, UC Berkeley Retirement Center, 1925 Walnut St. #1550

DAVIS *

- 2-3:30 p.m., August 25, Memorial Union Bldg., Garrison Room

IRVINE

- 12:30 – 1 p.m., August 20, 111 Theory, HR Training Rm.

UCLA

- 9 a.m. to 3 p.m., August 11 and August 18, UCLA Emeriti/Retiree Relations Center

RIVERSIDE

- 9 to 9:45 a.m., August 10, Education Development Center

SAN DIEGO

- 1:30 to 2 p.m., September 9, UCSD Retiree Center

SAN DIEGO MEDICAL CENTER

- 1:30 to 2 p.m., August 18, Hillcrest: Camelot, 132 Dickinson St. San Diego

SAN FRANCISCO

- 11:30 a.m. to 1 p.m., August 5, Mission Bay, GH Auditorium
- 10:30 a.m. to 12 p.m., August 12, Parnassus N-217

SANTA BARBARA

- 11 a.m. to noon, August 5, Human Resources Learning Center

SANTA CRUZ

- 10 to 10:30 a.m., August 10, 1201 Shaffer Rd., Staff HR Training Rm.

* To RSVP, call 800-642-7131

** To RVSP, call 310-825-7456

*** To RSVP, call 858-534-4724

Share Your Stories



A Novel Leap of Faith

UC Berkeley retiree Leslie Larson took a leap of faith when she retired in 2006 at age 50. Here is her story:

After graduating from UC, I spent most of my adult life as a UC employee. For the last ten years of my career, I was a senior writer at UC Press, where I wrote promotional copy for about 100 books a year. Over the years I managed to find time to write quite a few short stories, reviews, feature articles, more aborted novels than I care to remember, and three complete novels, the last of which (*Slipstream*) was finally accepted for publication.

Since I was a teenager, I dreamed of being a full-time novelist, and as my 50th birthday began to loom, it dawned on me that if I didn't do it soon, I never would. I weighed the



pros and cons of early retirement as carefully as I could, but the final decision boiled down to a now-or-never leap of faith. So far, the risk has paid off. Crown published my second novel (*Breaking Out of Bedlam*) in January 2010, and the third is well under way.

I've also had the chance to teach writing workshops and to speak and read across the country. Since I retired, I've taught reading to elementary school kids, been a writing coach to middle schoolers, and am now trying to bring my work to the senior community. I've met so many people. I'm learning every day. My ties to the

university are still strong (I live walking distance from Cal). In many ways I feel I'm just beginning.

So my story is more one of emergence than of retirement. I'm very grateful for my career at UC and for the second life it has afforded me. 🌟

Share Your Stories

We'd like to hear from you. Whether you have a challenging issue related to retirement or a story about the joys of your life as a retiree, write to us and we may share your story in *New Dimensions*. Reach us by email (NewDimensions-L@ucop.edu) or regular mail (*New Dimensions* editor, 1111 Franklin Street, 7th Floor, Oakland, CA 94607).

Post-Employment Benefits continued from page 1

group and the task force feels strongly that we should make every effort to mitigate the impact on these retirees."

For the under age 65 group, the task force is considering whether their health premiums should continue to be blended with those of active employees, which lowers the retirees' premium cost and thereby keeps premiums more manageable as the UC contributions decrease.

The task force is also looking at recommendations that would change eligibility criteria for retiree health benefits for future retirees. For example, one option would be to raise the minimum eligibility for an employer contribution to retiree health from the current age 50 to age 55. Changes to the current graduated eligibility formula whereby those

with 10 to 20 years of service receive a percentage of the UC premium contribution are also being discussed.

If implemented, the retiree health options could reduce UC's current unfunded liability from \$14 billion to between \$9 and \$10 billion.

As for the pension, nothing will change for current retirees, says Marian Gade, chair of the Council of UC Retirement Associations (CUCRA) and a member of the task force pension workgroup. "We are among the fortunate people in the world who have a stable pension and will continue to have one," she said. "The university will continue to pay the benefits we've earned, and we will not have to contribute to the pension plan."

The pension work group is considering several recommendations

including a new UCRP tier for new employees with different minimum retirement age and age factors, a defined contribution plan option for some workers, and future levels of employer and employee contributions to the UC Retirement Plan.

Once the Task Force delivers its report, much work will remain, says Scott. The President will review the recommendations and decide which to discuss with the Regents. Consultation with the Academic Senate, the UCRS Advisory Board, and other UC leadership will continue. Changes are subject to collective bargaining with represented groups.

NOTE TO LANL and LLNL RETIREES: Post-Employment Benefits Task Force proposals will have no effect on your retirement income or retiree health benefits. 🌟

New Dimensions

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Retiree Association Contacts

Use this listing if you are interested in joining an association or to inform your association of an address change. If you have moved away from your home campus emeriti/retiree association, you are welcome to join the association where you live.

If you have questions about your UCRS retirement benefits, call the UC Customer Service Center at 1-800-888-8267 (8:30 a.m. to 4:30 p.m. PT)

UC Berkeley Retirement Center

Patrick Cullinane, Director
510-642-5461, ucbrc@berkeley.edu
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UC Davis Retiree Center

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UCI Center for Emeriti and Retirees

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949-824-7769
emeriti@uci.edu or retirees@uci.edu

LANL Retiree Association

Mary Mariner
505-672-1950
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LBNL Retiree Association

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510-524-1953, scstroh@gmail.com

LLNL Retiree Networking Group

llnretirees.org

UCLA Emeriti/Retirees Relations Center

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951-689-3885, falaise27@cs.com

UCSD Retirement Resource Center

Suzan Cioffi, Director
858-534-4724, RetireeLink@ucsd.edu
or Emeriti@ucsd.edu

UC San Francisco

Emeriti: Ernest Newbrun
415-731-7421
Retirees: Frances Larragueta
415-776-7220

UC Santa Barbara Emeriti/Retiree Relations Center

805-893-2168

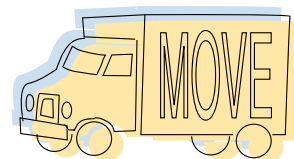
UC Santa Cruz

Emeriti: Stanley D. Stevens
831-475-9172,
sstevens@library.ucsc.edu
Retirees: Jerry Walters
831-475-0381, jwalters@cruzio.com

Note to associations: To update a listing, write to Anne Wolf at *New Dimensions* (email: anne.wolf@ucop.edu).

Are you moving?

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Inside:

- Post-employment benefits task force—page 1
- Health care reform’s effect on UC benefits—page 2
- New rules for minimum distributions—page 4
- Financial education for retirees—page 5
- and more...

View Your Monthly Benefit Income Statement Online

Retirees may now view their monthly benefit income statement online.

This capability provides retirees with an electronic record of their statements, whether they receive benefits via direct deposit or a paper check.

The electronic Benefit Income Statement includes information about the pension benefit, taxes withheld, health insurance premiums and more. It gives retirees the same online access to income statements that active employees have.

“As faculty and staff retire, they are looking for the same electronic options in retirement that they had as employees,” says Christy Thompson, manager of HR applications. The online benefit income statement is the first of several new online fea-

tures HR expects to provide retirees in the coming months.

To view your statements, visit At Your Service (atyourservice.ucop.edu) and select “Sign in to my account.” Enter your username and password and then select “Benefit Income Statements” under “Retirement & Savings.” Statements dating back to January 2009 are available for viewing, and up to 18 months of statements will be available online. For recent retirees, a combination of the past 18 months of payroll statements (select “Earnings Statement” under “Income & Taxes”) and retirement benefit income statements are posted.

UC will continue to send paper statements in addition to posting the statement online. At a future date, retirees may be able to elect to not receive a paper statement.

