

Benefits for Domestic Partners

UNIVERSITY
OF
CALIFORNIA



The University of California works hard to be a good employer, so it's no surprise to learn that we've been a leader in offering benefits to domestic partners. UC began offering health coverage to eligible domestic partners in 1998, and added pension survivor benefits in 2002. Many of your UC benefits may extend to your domestic partner and, in some cases, his or her child or grandchild. This booklet explains what's available to your family members and what you need to do to cover them.

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Your domestic partnership must meet certain criteria for UC benefits eligibility. This section includes information on eligibility rules, supporting documentation you will need to enroll your partner, as well as steps you need to take should your partnership end.

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Your partner and/or your partner's child or grandchild may be able to enroll in the following insurance plans: medical, dental, vision, dependent life, accidental death and dismemberment, and legal.

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Under UC policy, you may take time off to bond with a new child or to care for a domestic partner (or a partner's child) who is ill.

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Depending on your retirement plan, your domestic partner may be entitled to monthly survivor benefits in case of your death. In some instances, your partner's child may also receive survivor benefits.

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From registering your partnership with the state of California to notifying UC of changes to your status, these are the forms you'll need.

Eligibility for Domestic Partnership Benefits

Please note that there are differences in the eligibility requirements, and in the process for establishing eligibility, for health and welfare benefits and for UC Retirement Plan (UCRP) benefits. It is important to read all requirements carefully to ensure your domestic partner receives full benefits.

DEFINITION OF DOMESTIC PARTNERSHIP FOR BENEFITS ELIGIBILITY

Under UC's rules, there are three definitions of a domestic partner. Your partnership must meet one of the three definitions below, as well as the benefit-specific requirements defined by the health and welfare regulations and the UCRP regulations.

- A domestic partnership registered with the state of California is a domestic partnership for UC benefits eligibility purposes.
 - Same-gender domestic partners can register their domestic partnership with the state of California.
 - Opposite-gender domestic partners can register their domestic partnership with the state of California if one or both partners are over age 62 and eligible for Social Security benefits based on age.
- A domestic partnership formed in another jurisdiction which has requirements substantially equivalent to California's requirements also qualifies as a domestic partnership. For UCRP benefits eligibility purposes, this definition includes only same-gender domestic partnerships formed in another jurisdiction. For health and welfare benefits eligibility purposes, it includes same-gender and opposite-gender domestic partnerships formed in another jurisdiction.
- A partnership that **has not been registered with the state** can be considered a domestic partnership for UC benefits eligibility purposes if it meets the **requirements below**.
 - Parties must be each other's sole domestic partner in a long-term, committed relationship and must intend to remain so indefinitely.
 - Neither party may be legally married or be a partner in another domestic partnership.
 - Parties must not be related to each other by blood to a degree that would prohibit legal marriage in the state of California. For example, not parents and children, brothers and sisters, half-brothers and half-sisters, uncles and aunts, nieces and nephews, or ancestors and descendants of every degree (this means grandparents and grandchildren, great-grand-parents and great-grandchildren, etc.).
 - Both parties must be at least 18 years old and capable of consenting to the relationship.
 - Parties must be financially interdependent.
 - Parties must share a common residence.

If you are in a partnership that has not been registered with the state, there is an additional requirement to be recognized for UCRP benefits eligibility: the UCRP member must submit a *Declaration of Domestic Partnership for Purposes of UC Retirement Plan Benefits* (UBEN 250) to UC Human Resources and verify the partnership with the supporting documentation described on page 5.

If both you and your domestic partner are employees eligible for UCRP, you must each submit a separate UBEN 250, signed by both partners.

ELIGIBILITY FOR HEALTH AND WELFARE BENEFITS

Eligibility requirements for UC Health and Welfare benefits differ for same-gender and opposite-gender domestic partners, as noted in the table below. No declaration form or documentation is needed to initially enroll, but you will be asked to submit documentation after enrollment (see "Supporting Documentation" on page 5) to establish ongoing eligibility for health and welfare benefits.

Requirements for same-gender domestic partners	Requirements for opposite-gender domestic partners
One of the following: <ul style="list-style-type: none"> • Registered with the State of California or other valid jurisdiction OR • Able to meet the requirements above for a partnership that has not been registered, with appropriate supporting documentation upon request 	Either the Employee or the domestic partner must be age 62 or older and eligible to receive Social Security benefits based on age AND satisfy one of the following requirements: <ul style="list-style-type: none"> • Registered with the State of California or other valid jurisdiction OR • Able to meet the requirements above for a partnership that has not been registered, with appropriate supporting documentation upon request

ELIGIBILITY FOR UC RETIREMENT PLAN BENEFITS

Both same-gender and opposite-gender partners age 18 or over may be eligible for applicable survivor benefits from the UC Retirement Plan (UCRP)—unlike Health and Welfare benefits, there is no age 62 requirement for opposite-gender domestic partners for eligibility for UC Retirement Plan benefits. However, as noted above, if your partnership is not registered, **it is important for you to submit a Declaration of Domestic Partnership for Purposes of UC Retirement Plan Benefits (UBEN 250) as soon as possible.**

Requirements for same-gender domestic partners	Requirements for opposite-gender domestic partners
<ul style="list-style-type: none"> Registered with the State of California or other valid jurisdiction <p>OR</p> <ul style="list-style-type: none"> Able to meet the requirements above for a partnership that has not been registered, file a signed UBEN 250 and submit appropriate supporting documentation 	<ul style="list-style-type: none"> Registered with the State of California <p>OR</p> <ul style="list-style-type: none"> Able to meet the requirements above for a partnership that has not been registered, file a signed UBEN 250 and submit appropriate supporting documentation

UC RETIREMENT CHOICE PROGRAM PARTICIPANTS

Please note that Pension Choice participants are UCRP members (eligible for applicable UCRP benefits), and Savings Choice participants are not. Your Savings Choice account may be left to a designated beneficiary.

Make sure you name your designated beneficiary or beneficiaries by name (not just title, such as “my child” or my “domestic partner”).

SUPPORTING DOCUMENTATION

In order to verify your domestic partnership, you must submit:

- State of California form NP/SF DP-1 (Declaration of Domestic Partnership), or
- Proof of registration of partnership with other valid jurisdiction (for UCRP benefits eligibility purposes, accepted only for same-gender domestic partnerships; for health and welfare benefits eligibility purposes, accepted for same-gender and opposite-gender domestic partnerships), or
- At least two of the documents below (with a UBEN 250 signed by both partners if establishing eligibility for UCRP benefits):
 - Joint mortgage, joint property tax statement or joint tenancy on a residential lease
 - Joint bank account
 - Joint liabilities (e.g., credit card, home equity loan or car loan)
 - Joint ownership of significant property (e.g., a car or a house)
 - Durable property or health care power of attorney
 - Wills, life insurance policies or retirement annuities naming each other as primary beneficiary
 - Written agreement or contract showing mutual support obligation or joint ownership of assets acquired during the relationship
 - Copy of any declaration, affidavit or similar document filed with any other governmental entity
 - Joint utility bill
 - Joint property tax statement

SUBMITTING DOCUMENTATION

Health and welfare benefits: Supporting documents must be submitted upon request to Secova, which verifies benefits eligibility for UC.

UCRP benefits: If you have submitted documentation of your domestic partnership to Secova to verify your domestic partner’s eligibility for health and welfare benefits, no additional documentation needs to be submitted with the signed UBEN 250. If you have not submitted this documentation, or if your domestic partner is not enrolled for health and welfare benefits, you will need to submit the required documentation with the UBEN 250 or before your retirement. If you have a signed UBEN 250 on file, your surviving domestic partner may submit supporting documentation of your partnership following your death.

There is a one-year domestic partnership requirement for eligibility for certain UCRP survivor benefits. See page 9 for details of this and other requirements and their verification.

Eligibility for Domestic Partnership Benefits

TERMINATING A DOMESTIC PARTNERSHIP

FOR UCRP SURVIVOR INCOME

If your partnership ends, you must submit one of the following:

- A copy of the filed California State Notice of Termination of Domestic Partnership (SEC/STATE NP/SF DP-21)
- A copy of a final judgment of dissolution or nullity of the domestic partnership
- UC form UBEN 253 (*Termination of Domestic Partnership for Purposes of UC Retirement Plan Benefits*)

Submitting a termination notice or court order is important. If the information on file is not current, UC Human Resources could pay survivor benefits to a former partner instead of other eligible recipients, such as your child. You are responsible for providing your domestic partner with a copy of the termination form (UBEN 253).

FOR HEALTH AND WELFARE BENEFITS

Within 31 days after a domestic partnership ends, you must notify UC of the change and de-enroll an ineligible partner and his or her children.

- Employees should complete and submit form UPAY 850 (*Enrollment, Change, Cancellation or Opt Out—Employees Only*). Check the appropriate box in Section 3 and enter the date the partnership ended.
- Retirees should complete and submit form UBEN 100 (*Retiree Continuation, Enrollment or Change—Medical, Dental and/or Legal Plan*). Check the appropriate box in Section 2 and enter the date the partnership ended.

Coverage stops at the end of the month in which the domestic partnership ends. However, if covered under the medical, dental and/or vision plan, your partner and/or your partner's child or grandchild may be able to continue coverage under COBRA for up to 36 months. For more information, contact your benefits office and visit the COBRA page at ucal.us/COBRA.

Health and Welfare Benefits

WHAT'S AVAILABLE

Your partner, and/or your partner's child or grandchild, may qualify for some or all of the following benefits, assuming you and they meet the eligibility requirements described above. See *A Complete Guide to Your UC Health Benefits*, available on UCnet (ucnet.universityofcalifornia.edu), for more information about the benefit program. Keep in mind that your family members may be enrolled only in the same plans as you.

INSURANCE COVERAGE

Insurance	Employee	Retirees
Medical	•	•
Dental	•	•
Vision	•	•
Dependent life insurance	•	
AD&D	•	•
Legal	•	•
Bright Horizons Care Advantage	•	
Flexible Spending Accounts	•	

See "Enrolling your partner in insurance plans" on page 7 for details about how and when to cover your family members.

BRIGHT HORIZONS CARE ADVANTAGE

This is a membership-based Web resource to help you find prescreened childcare and eldercare. UC pays for access to the site; you pay for care. (Sorry, retirees are not eligible for UC-paid access, but may use the site with their own paid membership.)

TAX-SAVINGS PROGRAMS

UC offers an array of options for paying for certain qualified expenses on a pretax basis. Some of these benefits, such as those described below, may extend to your domestic partner and/or his or her child or grandchild.

Flexible Spending Accounts (FSAs): You may use the Dependent Care FSA and Health FSA for your partner's expenses or those of his or her child or grandchild, provided you claim them as dependents for tax purposes.

RETIREE AND SURVIVOR HEALTH BENEFITS

If you're eligible to carry UC-sponsored medical, dental and/or legal coverage into retirement, your partner (and his or her child or grandchild) may be able to continue coverage as well. To learn more, see the *Retirement Handbook*, available at ucal.us/retirementhandbook.

Similarly, your enrolled family members may be able to continue their coverage in the event of your death.

If you die while still employed by UC: For details about continued UC health and welfare plan coverage, COBRA coverage or conversion to individual policies, see the *Survivor and Beneficiary Handbook for Family Members and Beneficiaries of UC Employees*, available at ucal.us/survivorhandbook.

If you die after retirement: Your partner and/or his or her child or grandchild may be eligible to continue coverage if they are eligible to receive a monthly benefit from the UC Retirement Plan. For details about continued coverage, see the *Your Guide to Survivor and Beneficiary Benefits for Family Members and Beneficiaries of UC Retirees and Disabled Members Receiving UCRP Income*, available on UCnet (ucnet.universityofcalifornia.edu).

ENROLLING YOUR PARTNER IN INSURANCE PLANS

You may enroll your domestic partner and his or her child or grandchild, according to the table below. Note that your partner’s period of initial eligibility (PIE) is the 31 days following the date your partner first meets all eligibility requirements for

coverage (see page 4 for complete eligibility requirements). For example, depending on your circumstances, your partner may meet the eligibility requirements, and the 31-day window for making benefits changes may begin, when:

- Your partnership is registered with the State of California or (for same-gender partnerships only) other jurisdiction
- You and your partner begin to share a common residence
- You and your partner become financially interdependent (e.g., purchase a car or home together)
- Your opposite-gender domestic partner turns 62

If you are currently enrolled in a UC-sponsored medical plan and you miss the PIE to enroll your partner and/or child/grandchild, you can enroll in the medical plan at any time. Coverage will be effective after 90 days. After your partner’s initial PIE, you will need to wait until the next open enrollment (usually held in the fall of each year) to enroll your partner and/or child/grandchild in other health and welfare benefits.

After your family members are enrolled, you will be required to submit documentation to verify their eligibility for benefits. You will receive information explaining the verification process and the documents needed to verify your family members’ eligibility.

Your status	When to enroll your partner and/or child/grandchild	How to enroll them
Employee	When you’re first eligible	Online
	During open enrollment	Online
	During your PIE (beginning when your partner first meets eligibility criteria)	Submit form UPAY 850 (<i>Enrollment, Change, Cancellation or Opt Out—Employees Only</i>). If your partnership is registered with the state of California, check the appropriate box in Section 3 and enter the filing date. If the partnership is not registered, check the box for “Not registered” and enter your partner’s (or partner’s child or grandchild’s) date of eligibility.
	If you are currently enrolled in a UC-sponsored medical plan and you miss the PIE to enroll your partner and/or child/grandchild, you can enroll in the medical plan at any time. Coverage will be effective after 90 days.	
Retiree	During open enrollment	Online
	During your PIE (beginning when your partner first meets eligibility criteria)	Submit form UBEN 100 (<i>Retiree Continuation, Enrollment or Change—Medical, Dental and/or Legal Plan</i>). If your partnership is registered with the state of California, check the appropriate box in Section 2 and enter the filing date. If the partnership is not registered, check the appropriate box and enter your partner’s (or partner’s child or grandchild’s) date of eligibility.
	If you are currently enrolled in a UC-sponsored medical plan and you miss the PIE to enroll your partner and/or child/grandchild, you can enroll in the medical plan at any time. Coverage will be effective after 90 days.	

Health and Welfare Benefits

TAX IMPLICATIONS

In most cases, your domestic partner and his or her children do not automatically qualify as your dependents under the Internal Revenue Code (IRC). That means any UC contribution toward their medical, dental and vision coverage is considered “imputed income” and may be subject to federal and California state income taxes, as well as Social Security and Medicare taxes (FICA) and any other required payroll taxes. This income is reflected on your annual W-2 statement.

Federal and California state income taxes: If your partner is a dependent as defined by the IRC, you are not subject to imputed income on UC contributions toward his or her health insurance. In order for your payroll records to accurately reflect this tax dependency, complete form UPAY 886 (*Declaration of Tax Dependency*) and submit it to your local Payroll Office.

Under rules implemented as part of health care reform legislation, there is no imputed income for federal or California state income tax purposes on the value of UC’s contribution for coverage provided to your biological, adopted and/or step-children (if you are considered the child’s step-parent under state law and the child’s parent is your same-gender registered domestic partner), regardless of whether they are your tax dependents. You will have imputed income for both state and federal tax purposes for coverage provided to children of your non-registered domestic partner and step-grandchildren if they are not your tax dependents.

WHAT YOU NEED TO DO

If you have imputed income, each November UC Human Resources will mail form UPAY 886 (*Declaration of Tax Dependency*) to you. If one or more of your covered family members is your tax dependent, complete the form and submit it to your local Benefits Office. After the form is submitted, payroll records will be adjusted and:

- The taxable gross income on your Form W-2 for the year will not include any imputed income for medical/dental/vision coverage and will be reduced for pretax contributions as appropriate
- Excess FICA contributions will reduce current FICA withholding

You may claim any excess income tax withheld when you file your tax returns.

You may be asked to submit proof of tax dependency.

California state income taxes only: If you have registered your partnership with the state of California, UC’s contribution for medical, dental and vision coverage is not considered imputed income for California state income tax purposes.

Use form UPAY 850 (*Enrollment, Change, Cancellation or Opt Out—Employees Only*), available at ucal.us/UPAY850, to notify your local Benefits Office that your partnership is registered so that imputed income is not reported for state tax purposes. Once the form is received, withholding on imputed income for California state taxes will stop, and the California taxable income on your Form W-2 for the year will not include any imputed income for health coverage for your partner. You may claim any excess state income tax withheld when you file your state income tax return.

If you have not registered your partnership with the state of California but are in a valid same-gender partnership in another jurisdiction that California recognizes as substantially equivalent to a California registered domestic partnership, you may be able to exclude the imputed income from state taxation when you file your tax return.

REFERENCE

A Complete Guide to Your UC Health Benefits

Leave Policies

University policies allow you to use sick leave to bond with a newborn, adopted or foster-care child and in case of the illness or death of a domestic partner or partner's child. You may also use family and medical leave in case of a partner's or partner's child's serious health condition.

For details on sick leave and family and medical leave policies, see the applicable personnel policy. If you are a represented employee, see your collective bargaining agreement (contract), available at ucal.us/laborrelations.

UC Retirement Plan Survivor Benefits

WHAT'S AVAILABLE

Lifetime monthly income

PRERETIREMENT SURVIVOR BENEFITS

If you die before you retire, monthly survivor benefits may be available to an eligible domestic partner if you have at least two years of UC service credit and die while employed at UC or receiving UCRP disability income.

Your domestic partnership must have existed for at least one year before your death and be verified as having existed continuously until your death, and your partner must meet other eligibility requirements.

IF YOU DIE WHILE ELIGIBLE TO RETIRE

If you're an active, inactive or disabled UCRP member—meaning that you're 50 or older (55 or older if you were hired or became eligible for UCRP after July 1, 2013 as a non-Safety member) with at least five years of UC service credit—your partner may receive a lifetime monthly benefit.

There is no one-year partnership requirement for benefits paid to your domestic partner in this case.

POST-RETIREMENT SURVIVOR BENEFITS

Your partner may be eligible to receive a lifetime monthly benefit if you die after you retire.

If you were eligible for UCRP membership before July 1, 2013 (1976 Tier membership), the post-retirement survivor benefit is automatic, and your partner will receive 25 percent of your basic retirement (50 percent if you are a member with non-coordinated benefits or a Safety member). (You can set aside more than that if, before your retirement, you opt to take a reduced monthly payment.)

For your domestic partner to be eligible for this automatic post-retirement survivor benefit, your partnership must be verified as having existed for at least one year at the time of your retirement and as having existed continuously until your death. In addition, you may be asked to submit documentation establishing your domestic partnership to UC before you retire. (See "Establishing a domestic partnership for UCRP survivor income" on page 10.)

If you became eligible for UCRP membership on or after July 1, 2013 as a non-Safety member, post-retirement survivor benefits are not automatic. You can, however, provide a survivor benefit to your partner (or to any person you choose) by designating him or her as your contingent annuitant and electing, before your retirement, a reduction in your pension.

UC Retirement Plan Survivor Benefits

Your child and/or your partner's biological or adopted child may also be eligible for preretirement and post-retirement survivor benefits. If you have both a domestic partner and an eligible child, survivor benefits will be paid to your partner, unless he or she dies before the child.

UC RETIREMENT CHOICE PROGRAM PARTICIPANTS

Please note that Pension Choice participants are UCRP members (eligible for applicable UCRP benefits), and Savings Choice participants are not. Your Savings Choice account may be left to a designated beneficiary.

Make sure you name your designated beneficiary or beneficiaries by name (not just title, such as "my child" or my "domestic partner").

TAX INFORMATION

There may be special tax consequences for these benefits. You may want to consult your tax adviser before taking any action.

ESTABLISHING A DOMESTIC PARTNERSHIP FOR UCRP SURVIVOR INCOME

If your partnership is registered with the state of California or another jurisdiction: Submit a copy of the Declaration of Domestic Partnership (California state form NP/SF DP-1) that you filed with the state of California or the form filed with another jurisdiction (same-gender domestic partners only). Send the document to:

UC Human Resources
Records Management
P.O. Box 24570
Oakland, CA 94623-1570

The process will be quicker if your Social Security number—or at least the first five digits—is included.

For preretirement survivor benefits, you can submit a copy of your state registration at any time, or your partner can submit a copy after you die. For post-retirement benefits, a copy of the state registration must be submitted prior to your retirement.

UC Human Resources will use the **date the state form was filed as the beginning date of the domestic partnership.**

If your partnership was registered with the state only recently, you may want to submit form UBEN 250 and supporting documentation (see "Supporting Documentation" on page 5) if

you are nearing retirement and can establish an earlier beginning date for your partnership. This action could preserve your partner's right to pre- or post-retirement survivor benefits, for which there is a one-year partnership requirement.

If your partnership is not registered: Submit form UBEN 250 (*Declaration of Domestic Partnership for Purposes of UC Retirement Plan Benefits*). If requested, be prepared to submit two supporting documents. See "Supporting Documentation" on page 9. Please note that both the UCRP member and his or her partner must sign the UBEN 250. If you do not submit this signed form, your domestic partner cannot submit the form after your death, and he or she will not be eligible to receive survivor benefits.

If both you and your domestic partner are employees eligible for UCRP, you must each submit a separate UBEN 250, signed by both partners.

If you have already submitted documentation of your domestic partnership to Secova to verify your domestic partner's eligibility for UC health and welfare benefits, no additional documentation needs to be submitted with the UBEN 250. If you have not submitted this documentation, or if your domestic partner is not enrolled for health and welfare benefits, you will need to submit the required documentation with the UBEN 250 or before your retirement. If you have a signed UBEN 250 on file, your surviving domestic partner may submit supporting documentation of your partnership following your death.

UC Human Resources will use the earliest date established by the documentation as the beginning date of the domestic partnership. For your partner to be eligible, you must submit the documentation prior to your retirement and it must establish that the relationship began at least one year prior to your retirement.

Forms You May Need

Action	Form	Available
Document domestic partnership (UCRP)	State of California form NP/SF DP-1 (Declaration of Domestic Partnership), or	Online at www.sos.ca.gov/dpregistry/forms.htm
	UC form UBEN 250 (<i>Declaration of Domestic Partnership for Purposes of UC Retirement Plan Benefits</i>)*	<ul style="list-style-type: none"> At the back of this booklet Online at ucnet.universityofcalifornia.edu/forms/pdf/uben-250.pdf
Report termination of partnership (UCRP)	State of California form NP/SF DP-2 (Notice of Termination of Domestic Partnership), or	Online at www.sos.ca.gov/dpregistry/forms.htm
	UC form UBEN 253 (<i>Termination of Domestic Partnership for Purposes of UC Retirement Plan Benefits</i>)	<ul style="list-style-type: none"> At the back of this booklet Online at ucnet.universityofcalifornia.edu/forms/pdf/uben-253.pdf
Enroll or cancel coverage in health and welfare plans	Employees: UPAY 850 (<i>Enrollment, Change, Cancellation or Opt Out—Employees Only</i>)	<ul style="list-style-type: none"> Online at ucal.us/UPAY850 (for UPAY 850) and ucal.us/UBEN100 (for UBEN 100)
	Retirees: UBEN 100 (<i>Retiree Continuation, Enrollment or Change—Medical, Dental and/or Legal Plan</i>)	<ul style="list-style-type: none"> From the Retirement Administration Service Center: 800-888-8267
Designate beneficiary for	UBEN 116 (<i>Designation of Beneficiary—Employees</i>)	<ul style="list-style-type: none"> Online at ucnet.universityofcalifornia.edu/forms/pdf/uben-116.pdf (form UBEN 116) and ucal.us/UBEN117 (form UBEN 117) From the Retirement Administration Service Center: 800-888-8267
	<ul style="list-style-type: none"> UCRP lump-sum death payment UCRP Capital Accumulation Provision (CAP) payment Life insurance (Basic, Supplemental, Core) Accidental Death and Dismemberment insurance 	
Designate beneficiary for	Fidelity's enrollment form	<ul style="list-style-type: none"> Online at ucfocusonyourfuture.com From Fidelity: 866-682-7787
<ul style="list-style-type: none"> Savings Choice 403(b) Plan 457(b) Plan DC Plan 		

* If both you and your domestic partner are employees eligible for UCRP, you must each submit a separate UBEN 250, signed by both partners.

UBEN 250—Declaration of Domestic Partnership for Purposes of UC Retirement Plan Benefits

EMPLOYEES/RETIREES:

Signing this Declaration establishes your domestic partnership with the University of California and will be used to help determine your partner’s eligibility for a number of survivor and death benefits. Signing this Declaration does not guarantee eligibility for benefits; however, if you die before confirming your partnership by an accepted method, your partner cannot be considered for such benefits.

The interests of a registered domestic partner are legally recognized under California law. Please consult your legal advisor to confirm your rights as a non-registered domestic partner.

If both you and your domestic partner are employees eligible for UCRP, you must each submit a separate UBEN 250, signed by both partners.

If you have registered your domestic partnership with the state of California or if you are in a same-gender partnership that is validly formed and registered in another jurisdiction and the partnership is substantially equivalent to a California-registered domestic partnership, you do not need to complete this form or take any other action at this time.

We, the undersigned, declare that we are domestic partners in accordance with the following criteria:

- We are each other’s sole domestic partner in a long-term, committed relationship and intend to remain so indefinitely.
- Neither of us is legally married or in another domestic partnership.
- We are not related by blood to a degree that would prohibit legal marriage in the state of California.
- We are both at least 18 years old and capable of consenting to the relationship.
- We are financially interdependent.
- We share a common residence.

REQUIRED SIGNATURES

Both parties must print and sign their names below.

Under penalty of perjury, we declare that the representations herein are true and correct and contain no material omissions of fact to the best of our knowledge and belief. We further declare that we have read, understand, and agree to the additional terms and conditions on the reverse of this form.

EMPLOYEE/RETIREE

Name (Last, First, Middle Initial) (Please Print)	Social Security Number
Signature	Date

DOMESTIC PARTNER

Name (Last, First, Middle Initial) (Please Print)	Social Security Number
Signature	Date

Send completed form to:
 UC Human Resources Records Management
 P.O. Box 24570
 Oakland, CA 94623-1570

UNIVERSITY OF CALIFORNIA Human Resources

UBEN 250—Declaration of Domestic Partnership for Purposes of UC Retirement Plan Benefits

ADDITIONAL TERMS AND CONDITIONS

1. For employees filing this declaration, the University of California will require proof that a domestic partnership meets joint residency, financial interdependence and one-year duration (if applicable) requirements at the time of the employee's retirement or death.

Acceptable documentation includes any two of the following.

- copy of any declaration, affidavit, or similar document filed with any other governmental entity
- joint mortgage or joint tenancy on a residential lease
- joint bank account
- joint liabilities (e.g., a credit card, home equity loan or car loan)
- joint ownership of significant property (e.g., a car)
- durable property or health care power of attorney
- wills, life insurance policies or retirement annuities naming each other as primary beneficiary
- written agreement or contract showing mutual support obligations or joint ownership of assets acquired during the relationship
- copy of any declaration, affidavit, or similar document filed with any other governmental entity
- joint utility bill
- joint property tax statement

If you have already submitted documentation of your domestic partnership to Secova to verify your domestic partner's eligibility for UC health and welfare benefits, no additional documentation needs to be submitted with the UBEN 250.

If you have not submitted this documentation, or if your domestic partner is not enrolled for health and welfare benefits, you will need to submit the required documentation with the UBEN 250 or at the time of your retirement. If you have a signed UBEN 250 on file, your surviving domestic partner may submit supporting documentation of your partnership following your death.

2. The university will use this declaration for the sole purpose of determining eligibility for survivor and/or death benefits for a domestic partner. It is not intended to establish any contractual rights or obligations between the employee and his/her domestic partner.

3. For UCRP members only: In most cases, for a domestic partner to be eligible for preretirement survivor income before the member was eligible to retire or (if applicable) for the postretirement survivor continuance from UCRP, the partnership must have existed, uninterrupted, for the 12-month period preceding the member's retirement or death, and continuously to the member's death.

A domestic partner will not be eligible for any UCRP survivor benefits unless one of the following requirements is satisfied: (i) the partnership is registered with the state of California; (ii) your same gender partnership is validly formed and registered in another jurisdiction and the partnership is substantially equivalent to a California-registered domestic partnership; (iii) this declaration is on file with the university and supporting documentation can be provided. Registering your partnership or filing this declaration with UC may affect the eligibility of your children for UCRP survivor benefits. The UCRP Plan Document and Regulations govern eligibility for UCRP benefits.

4. Termination of Partnership: If a domestic partnership confirmed in a *Declaration of Domestic Partnership* (UBEN 250) ends, the employee must, within 31 days after the date the partnership ends, complete and submit form UBEN 253 (*Termination of Domestic Partnership*) to UC Human Resources Records Management. Filing this form will terminate eligibility for survivor and/or death benefits for the domestic partner previously named in the declaration. Termination of a domestic partnership registered in California or another jurisdiction is governed by the laws of the applicable jurisdiction.

The member must provide the former domestic partner with a copy of the termination form.

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 information on this form, including your Social Security number, is to verify your identity, and/or for benefits administration, and/or for federal and state income tax reporting. 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 transmitted to the federal and state governments when required by law. 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 Vice President—University of California Human Resources, 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. The university's record keeping system was established prior to January 1, 1975 under the authority of the Regents of the University of California under Article IX, Section 9 of the California Constitution. The principal uses of your Social Security number shall be for state tax and federal income tax (under Internal Revenue Code sections 6011.6051 and 6059) reporting, and/or for benefits administration, and/or to verify your identity.

UBEN 253—Termination of Domestic Partnership for Purposes of UC Retirement Plan Benefits

EMPLOYEES/RETIREES:

Use this form to notify UC that your domestic partnership has ended if you used form UBEN 250 to establish your partnership. Do not use this form if your domestic partnership is registered with the state of California or if your same-gender partnership was validly formed and registered in another jurisdiction and the partnership is substantially equivalent to a California-registered domestic partnership. In that case, the termination process is governed by the laws of the applicable jurisdiction.

If you registered your partnership with the state of California or another jurisdiction as described above and submitted a copy of the appropriate registration form for UC benefit purposes and the partnership is terminating, you must submit a filed copy of the *State Notice of Termination of Domestic Partnership* (SEC/STATE NP/SF DP-2) or a copy of a final judgment of dissolution or nullity of the domestic partnership for a California registration or, if your same-gender partnership was validly formed and registered in another jurisdiction and is substantially equivalent to a domestic partnership, a copy of the form or order required by the other jurisdiction to document the termination or nullification of the partnership. In this situation, UC’s form (UBEN 253) will not be accepted as proof that your partnership has terminated.

It is your responsibility to provide your former domestic partner with a copy of this termination form and the date benefits end. Eligibility for survivor and/or death benefits stops on the date the domestic partnership ends.

Before you retire, you may submit a new declaration of domestic partnership if you enter into another partnership. Keep in mind, however, that other eligibility requirements still must be met—for example, the new partnership must exist for at least 12 months before certain survivor benefits can be paid.

OTHER

Submitting this termination form will not change any beneficiary designations you may have made for other university benefits—for example, the UCRP death benefit, 403(b), 457(b) or DC Plan accumulations, or life or AD&D insurance. If you want to name new beneficiaries for these plans, you must change your beneficiary online.

Also, in addition to submitting this termination form, you must cancel insurance coverage for a former partner and/or the partner’s child/grandchild. To do so, you must do as follows within 31 days of the terminating event:

Employees: Complete form UPAY 850 (*Enrollment, Change, Cancellation or Opt Out—Employees Only*) and submit it to your local Benefits or Payroll Office in accordance with local procedures.

Retirees: Complete form UBEN 100 (*Retiree Continuation, Enrollment, or Change—Medical, Dental and/or Legal Plan*) and submit it to the address shown on the form.

..... I, the undersigned, declare that my former partner (Last, First, Middle Initial)

..... and I are no longer partners . Our partnership ended on (Day, Month, Year)

EMPLOYEE/RETIREE

..... Name (Last, First, Middle Initial) (Please Print) Social Security Number

..... Signature Date

Send completed form to:
 UC Human Resources Records Management
 P.O. Box 24570
 Oakland, CA 94623-1570

UNIVERSITY OF CALIFORNIA Human Resources

UBEN 253—Termination of Domestic Partnership for Purposes of UC Retirement Plan Benefits

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.

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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 transmitted to the federal and state governments when required by law.

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 Vice President—University of California Human Resources, 1111 Franklin Street, Oakland, CA 94607-5200.

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By authority of the Regents, University of California Human Resources, located in Oakland, administers all benefit plans in accordance with applicable plan documents and regulations, custodial agreements, University of California Group Insurance Regulations for Faculty and Staff, 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 (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, retirees, 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, employer contributions and monthly costs at any time. Health and welfare benefits are not accrued or vested benefit entitlements. UC's contribution toward the monthly cost of the coverage is determined by UC and may change or stop altogether, and may be affected by the state of California's annual budget appropriation. If you belong to an exclusively represented bargaining unit, some of your benefits may differ from the ones described here. For more information, employees should contact their Human Resources Office and retirees should call the UC Retirement Administration Service Center (800-888-8267).

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 Systemwide AA/EEO Policy Coordinator, University of California, Office of the President, 1111 Franklin Street, 5th Floor, Oakland, CA 94607, and for faculty to the Office of Academic Personnel, University of California Office of the President, 1111 Franklin Street, Oakland, CA 94607.





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