

# new dimensions



## Regents appoint UC's first woman president



Janet Napolitano, courtesy of National Guard

The University of California Board of Regents appointed Janet Napolitano, secretary of the U.S. Department of Homeland Security and a two-term governor of Arizona, as the 20th president of the University of California.

Napolitano, the first female president in UC's 145-year history, succeeds Mark G. Yudof, who steered the university through the depths of California's financial crisis that led to sharp cutbacks in state support for public higher education.

Yudof, 68, served for more than five years and will remain on the job until Napolitano begins her tenure in late September.

"I am humbled by your support and look forward to working with you to build further on the excellence of UC," Napolitano said after the regents appointed her president.

Napolitano, 55, an accomplished public sector leader with a long-

## UC announces new medical plans for 2014

The following information does not apply to retirees from Los Alamos or Lawrence Livermore National Labs because health benefits are provided by LANS and LLNS, not UC.

When Open Enrollment begins this fall, UC retirees will have a new set of medical plan choices for 2014, including two new plans.

As part of a comprehensive review of its medical plan portfolio, UC considered proposals from new and current medical plan vendors in an effort to continue providing high quality medical insurance and offering choices that are more specific to individual needs, while limiting cost increases to retirees

and the university. The review also offered an opportunity to leverage UC's outstanding medical centers as well as take advantage of the changing medical-insurance marketplace so that UC can provide more diverse plans.

"We know how important quality health insurance is to our employees and retirees, and we are always looking for ways to ensure good benefits while managing costs," said Michael Baptista, executive director of Benefits Programs and Strategy. "The advent of health care reform and new medical insurance products provide a good opportunity to rethink our benefits while still maintaining choice and quality."

### Non-Medicare Plans

For non-Medicare retirees, UC will offer two new plans: UC Care and Blue Shield Health Savings Plan. In addition, Kaiser, Health Net Blue & Gold, Western Health Advantage and Core will continue to be available.

UC Care, a PPO that includes UC medical centers and doctors, has a three-tiered network of providers, with copayments for providers in the first tier, co-insurance for in-network providers and a higher co-insurance percentage for out-of-network providers. Tier one includes all of UC's medical centers and medical groups as well as additional providers for those who live or work near campuses that do not have a UC medical center.

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### Quoteworthy

"I am confident that she has the background and attributes needed to build upon the excellent work of her predecessor."

Bruce Varner, UC Regents Chair  
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### Calendar

- Oct. 28** Open Enrollment begins
- Dec. 16** Deadline for making changes to

### Spotlight

UC takes a new approach to medical insurance for medicare retirees living outside California.

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## Dec. 16 deadline set for customizing Minimum Required Distributions

The IRS requires retirees to begin receiving Minimum Required Distributions (MRDs) from retirement accounts the year they reach age 70 ½ or are no longer working, whichever is later.

If you've already set up systematic withdrawals from your accounts, you don't need to worry about MRDs; you're meeting the requirements.

You also don't need to worry if you're satisfied with receiving your MRD through Fidelity's automated process. In that case, Fidelity will automatically send your MRD payment to your home address in mid to late-December of each year. In the automated process, if you have money invested in more than one investment fund, Fidelity will withdraw your MRD proportionally from each fund.

However, if you want to customize the funds from which the MRD is withdrawn, the time of year you receive it, whether to have the payment deposited directly to your chosen bank account and the amount of taxes withheld from the distribution; just contact Fidelity Retirement Services (866-682-7787) a few days prior to when you wish to receive your distribution (no later than Dec. 16) to make arrangements.

MRD requirements apply to each of UC's Retirement Savings Program accounts (DC, 403(b) and 457(b)) separately. If you have money in more than one account, you must receive an MRD from each.

The *Minimum Required Distributions Fact Sheet*, available at <http://ucal.us/MRDfacts>, provides additional information about MRDs or call Fidelity at 1-866-682-7787.

## UC taking steps to implement changes resulting from Supreme Court's DOMA, Prop 8 rulings

Like employers across the country, UC has been reviewing the legal, policy and operational implications of the Supreme Court rulings on California's Proposition 8 and the federal Defense of Marriage Act (DOMA) for the university and its employees and retirees.

As a result of the rulings, retirees are no longer subject to taxes on the "imputed income" for UC's contribution to the cost of health insurance coverage provided for a same-gender spouse enrolled in UC-sponsored benefits.

In addition, a retiree's portion of the cost of health insurance coverage for his or her spouse may be deducted on a pretax basis rather than on an after-tax basis.

The rulings do not affect same-gender domestic partners.

"We know employees and retirees are eager to see these changes go into effect, and we are working as quickly as possible to make them," said Dwaine Duckett, vice president of human resources. "Unfortunately, implementation is more complicated than it may seem, and it will take more time than we would like."

The immediate priorities for UC are:

- Making programming changes to payroll and HR systems necessary to implement the tax changes
- Encouraging retirees who were married prior to the rulings to self-identify as soon as possible to ensure they benefit from the changes
- Getting guidance from federal agencies on the effective date of the change
- Assisting retirees when that guidance becomes clear

In addition, Duckett said, retroactivity is of critical importance to those affected, and federal guidance has not yet been issued. "It is understandable that people want equitable tax treatment to the fullest extent. We will be prepared to support them and help navigate retroactivity issues when the guidelines become available.

Work has begun on the programming and administrative details to implement the changes, and UC expects them to be ready by mid-September.

In the meantime, retirees who currently have a same-gender spouse will need to self-identify in order to ensure the taxes on imputed income are not withheld once the programming changes have been completed.

Retirees should submit the UBEN 100 form ([ucal.us/UBEN100](http://ucal.us/UBEN100)) to the UC Retirement Administration Service Center.

There is no need to complete the entire form, but be sure to include retiree name, ID number, spouse's name and marriage date.

### Special enrollment period

As a result of the Supreme Court rulings, UC retirees have the opportunity to enroll their same-sex spouse in UC health benefits or, in some instances, to change the plans in which they are enrolled.

- If a retiree marries his or her same-gender domestic partner who is not currently covered by UC's health and welfare programs, the retiree may enroll in and/or add his/her new spouse and eligible family members to health and welfare plans within 31-days of the marriage. Coverage is effective on the date of marriage.
- If a same-sex spouse married prior to the Supreme Court rulings is not currently covered by UC's health and welfare programs, the retiree has a period of eligibility to enroll in and/or add his/her spouse and eligible family members in health and welfare plans due to changes in tax treatment. Coverage is effective on the date of receipt of the enrollment form.
- If a same-sex spouse married prior to the Supreme Court rulings, or same-gender domestic partner married after DOMA, are currently covered by UC's health and welfare programs, the retiree may change plans now and/or add eligible family members due to changes in tax treatment. This is a limited eligibility period applicable only to medical, dental and vision plans. Coverage is effective on the date of receipt of the enrollment form.

In all of these cases, taxes on imputed income will be deducted until payroll system programming changes have been completed. The Retirement Administration Service Center will retain copies of the enrollment forms so that once the system is updated the retiree record can be changed to allow for accurate tax treatment.

To enroll an eligible same-gender spouse, retirees should submit a completed UBEN 100 enrollment form ([ucal.us/UBEN100](http://ucal.us/UBEN100)) to the Retirement Administration Service Center.

Per UC's family member eligibility verification (FMEV) process, newly married couples will be required to submit proof of their marriage. UC is working with Secova, FMEV administrator, in an effort to prevent the need for previously verified couples to resubmit documentation.

### Other issues

There are several other outstanding issues related to taxes and benefits to be resolved either through guidance from the federal government or through changes in UC processes. These include whether the federal law will apply for those who live in states that do not permit same-gender marriage, whether the tax changes will be retroactive, and what additional operational and policy changes UC will need to make to address benefits enrollment and eligibility changes needed as a result of the Supreme Court rulings.

"Those affected by these changes can feel confident that UC will make the adjustments necessary to be consistent with the law as quickly as we are able," Duckett said. "UC will assist anyone in understanding their rights and obligations going forward."

Watch for more information on At Your Service ([atyourservice.ucop.edu](http://atyourservice.ucop.edu)).



## Customer Service Center now called Retirement Administration Service Center

The UC Customer Service Center has a new name. With big changes around the corner, the center wanted to clarify its role and avoid confusion. So it's now known as the Retirement Administration Service Center (RASC).

The new name better defines what the customer service center does – help UC Retirement Plan members with issues related to their pension and retiree health benefits.

The name change is part of a wider series of adjustments UC is making to its benefits management systems. These adjustments include the creation of the UCPath Center in Riverside that will enable active employees to manage their benefits through an online portal or by phone with the UCPath Center support staff.

UCPath is scheduled to launch at UCLA, UC Santa Cruz, UC Merced and UC Office of the President in July 2014 with all other UC locations following in two waves through 2015.

For retirees, little will change. The customer service center, under its new name, will continue to be the point of contact for questions regarding pension and health benefits.

RASC can be reached online (<https://secure.ucop.edu/secureapps/ays/csform.html>), by phone at (800) 888-8267 (Monday to Friday 8:30 a.m. to 4:30 p.m. Pacific Time), or at this address:

UC Retirement Administration Service Center  
P.O. Box 24570  
Oakland, CA 94623-1570

## Notice of Creditable Coverage

To comply with federal regulations, UC annually publishes the following notice of creditable coverage.

On January 1, 2006, prescription drug plan coverage called Medicare Part D became available for everyone with Medicare Part A and B.

### Creditable Coverage

The University of California has determined the prescription drug coverage offered by the following UC-sponsored plans (Anthem Blue Cross PLUS-Medicare; Anthem Blue Cross PPO-Medicare; Core-Medicare; High Option Supplement to Medicare; Anthem Lumenos PPO with HRA; Health Net Medicare HMO (Seniority Plus); Kaiser Permanente-California Senior Advantage Plan; Kaiser Permanente Umbrella Plan (closed to new members)) is considered Creditable Coverage. This means the prescription drug coverage in these plans is expected to pay on average at least as much as the standard Medicare prescription drug coverage.

### Non-Creditable Coverage

The University of California has determined the prescription drug coverage offered by the Anthem Blue Cross PPO-Medicare without Prescription Drugs is considered Non-Creditable coverage. This plan has no prescription drug coverage.

The Medicare Modernization Act imposes a late enrollment penalty on individuals who do not maintain "Creditable Coverage" for a period of 63 days or longer following their initial enrollment period for the Medicare Part D prescription drug benefit. This penalty will not become effective if the individual is still working and enrolled in the employer's group health plan.

For additional information, visit: [www.medicare.gov](http://www.medicare.gov); or call 1-800-MEDICARE (1-800-633-4227) or TTY/TDD users call 1-877-486-2048.

#### *Medicare Part D Prescription Drug Formulary*

Each health plan has its own preferred list of Food and Drug Administration-approved generic and brand name drugs, called

a prescription drug formulary. Medicare determines the classes of drugs that must be included in a Medicare Part D plan but the list of individual drugs may vary in each health plan formulary, and may change during the year because drug therapies change, new drugs are released, new medical information becomes available, or as a result of Medicare Part D requirements. Call your health plan or check their website for formulary details.

#### *Non-UC Prescription Drug Plans*

The Annual Coordinated Election Period (ACEP) for Medicare Part D drug plans is from October 15 to December 7, 2013. You will only be able to join, and get coverage under one Medicare drug plan at a time. If you enroll in a non-UC Medicare prescription drug plan, you cannot continue to be covered in a UC sponsored medical plan that has a Medicare Part D drug benefit. Please call UC Customer Service at 1-800-888-8267 with any questions before signing up for a non-UC sponsored Medicare Part D plan.

## Guidelines help physicians answer prognosis question



“How long do I have to live?” is a question senior citizens and those battling terminal illness often ask their doctors.

Now, a UC San Francisco-led team of physicians has created a set of guidelines for doctors and other clinicians to use for communicating uncertain prognoses to patients.

Prognosis – the science of predicting how long a patient will live – can be a complex undertaking because uncertainty is an inherent part of predicting medical outcomes.

“It used to be that making a prognosis was a fundamental part of what we did, and that’s waned over time as we’ve focused more on diagnosis and treatment,” said senior author Alexander K. Smith, MD, MPH, assistant professor of medicine in the UCSF Division of Geriatrics. “But providing a prognosis is still an essential part of what we do. Patients ask about it. It is important for nearly every medical decision in older adults.”

Read more at: [ucal.us/cwojH3](http://ucal.us/cwojH3)

## Lab projects win research awards

A generator that uses a virus to convert mechanical energy to electricity and a new material that will boost power storage in rechargeable batteries are among

15 inventions by UC-affiliated national laboratory scientists were honored.

15 inventions by UC-affiliated national laboratory scientists that were honored with a 2013 R&D 100 Award.

Eight of the awards, often dubbed the “Oscars of Innovation,” went to researchers at Lawrence Berkeley National Laboratory. Four inventions from Lawrence Livermore National Laboratory were honored, along with two from Los Alamos National Laboratory; both labs collaborated with Sandia National Laboratories on another project.

Presented by R&D Magazine, the R&D 100 Awards recognize the year’s top 100 technology products from industry, academia, and government-sponsored research, ranging from chemistry to materials to biomedical breakthroughs. In all, Department of Energy’s national laboratories and facilities won 36 R&D 100 Awards this year.

Read more at: <http://www.universityofcalifornia.edu/news/article/29734>



The Council of UC Retiree Associations (CUCRA) offers the following travel opportunities in partnership with Grand Circle Travel and Collette Vacations. The CUCRA travel program benefits the work of the council.

### Burma & The Irrawaddy River

16 days • March 3, 2014

You will be staying four nights in Bangkok at the Montien Bangkok Hotel, three nights in Rangoon at the Sedona Hotel Yangon and seven nights aboard the privately chartered 34-passenger small cruise ship R/V Paukan, which was built in 2012.

Group No. G4-23853  
Main Deck: \$5,495; Upper Deck B: \$5,795 double occupancy, from departing city (LAX or SAN). For more information go to: [www.gct.com/bur2014](http://www.gct.com/bur2014)

### The Rivas: France, Italy & the Isles

16 days • May 27, 2014

You will be staying three nights at Montaigne Hotel & Spa in Cannes, France, seven nights aboard a private Grand Circle small ship, and four nights at Hotel Albani Firenze in Florence, Italy.

Group No. G4-23853  
Decks A, B or C: \$6,995 to \$7,495 double occupancy, from departing city (LAX or SAN). For more information go to: [www.gct.com/frv2013](http://www.gct.com/frv2013)

### Tropical Costa Rica

9 days • March 15, 2014

Explore part of the 20,000-acre nature preserve of Cano Negro on a riverboat adventure. Spend two nights in Monteverde's fascinating cloud forest. Explore San Jose's Plaza de Cultura and the magnificent National Theatre. Relax in the mineral-rich waters of a hot springs with views of Arenal Volcano and much, much more.

Booking No. 563840  
\$2,349 per person, double occupancy; book early and save \$100 per person.

### Shades of Ireland with Northern Ireland

13 days • May 13, 2014

Experience all of the charms of Ireland on this tour of the Emerald Isle including Dublin, Kilkenny, Waterford Crystal, Blarney Castle, Ring of Killarney, a farm visit, Limerick, Cliffs of Moher, Galway and a Castle stay.

Booking No. 563656  
\$4,049 per person, double occupancy

**Burma and The Riverias trips are offered through Grand Circle Travel.**

All prices exclude taxes, optional tours, travel protection, pre-/post trips. Surcharges may apply. For reservations and information, call toll-free 1-800-597-2452; then press 2.

**Costa Rica and Ireland trips are offered through Collette Vacations.**

You can save \$250 per person unless otherwise noted by booking early. Prices include round trip air from LAX Intl. Airport, Air Taxes & Fees/Surcharges and Hotel Transfers. Go to [www.collettevacations.com](http://www.collettevacations.com) for more tour information or call (877) 872-4331 and cite the booking number.

## Chief Investment Officer Berggren retires



Chief Investment Officer Marie N. Berggren has retired after 11 years of service, the University of California Regents and Office of the President announced in July.

Berggren said in a letter that she had decided to retire for personal reasons.

“We are grateful to Marie Berggren for her years of dedicated service as chief investment officer and the many contributions she has made to the University of California,” said UC President Mark G. Yudof. “The Board of Regents and I wish her a healthy and fulfilling retirement.”

The regents named Associate Chief Investment Officer Melvin Stanton and Senior Managing Director-Fixed Income Randy Wedding to manage operations and oversee the investment portfolio, under the direction of UC Chief Financial Officer Peter Taylor, while the regents conduct a national search for Berggren’s replacement. Stanton and Wedding both have decades of experience in investment management.

Berggren, whose career in the financial industry has spanned nearly 40 years, was appointed chief investment officer and vice president for investments on June 2, 2006. As chief investment officer, she oversaw an investment portfolio of approximately \$80 billion, including retirement, endowment and cash assets.

## UC to take social approach to fundraising

This fall, UC is launching *Promise for Education*, an exciting new fundraising effort running from mid-September through October 31. The online peer-to-peer giving program is the first of its kind for UC and will bring together all 10 campuses, as well as alumni, retirees, parents, friends and fans of UC to raise scholarship funds for California students with financial need.

The concept of *Promise for Education* is simple: individuals make a personal promise – run a half marathon, adopt a kitten or volunteer weekly – then set a donation goal and reach out to their social networks for support. By using participants’ personal connections to trigger donations, UC will make philanthropy something to talk about.

To learn more about how your participation and support can be the difference for a deserving student, visit <http://www.promisefor-education.org>.



## UC President Yudof reflects on tenure at final regents meeting

University of California President Mark G. Yudof in May presented the Board of Regents with a report that charted the significant changes of the past six years and offered a candid assessment of how UC is performing today. He followed in July with reflections on his tenure.

Yudof, who steps down in September, said he had prepared the data-driven “white paper” to offer an overview of the significant trends and policy choices that might await the next president.

“To the best of my ability, I’ve tried to outline the good, the bad and the ugly – and there’s some of each,” Yudof said.

On the bright side, the University of California continues to shine when it comes to serving first-generation and low-income Californians.

The report notes that four out of 10 UC students are eligible for Pell Grants, meaning they come from families with annual incomes

of \$50,000 or less. That’s nearly double the average of other members of the Association of American Universities. And four UC campuses – Berkeley, UCLA, UC San Diego and Davis – each enroll more Pell Grant recipients than the entire Ivy League.

“The numbers do underscore the university’s rare and defining ability to serve vast numbers of disadvantaged students, while still producing research of world-class quality,” Yudof said. “Many universities can achieve one of these two results. But it’s quite rare to achieve both.”

The paper also details the steep drop in state financial support since 2007-08, and the affects that has had on tuition levels, faculty hiring and lagging salaries. Over the past six years, UC’s state appropriation has dropped by 27 percent, while mandatory expenditures have gone up by 15 percent.

Yudof said that even though the university’s financial outlook has improved slightly for the coming year, the “fiscal and societal ground has shifted” when it comes to support for funding public higher education – and is unlikely to return to the heyday of earlier years.

“More and more, the value of an education is seen as a private good, bestowed on those individuals who receive it, as opposed to a public good that nourishes society at large.”

You can read the white paper online at: [ucal.us/whitepaper](http://ucal.us/whitepaper). Yudof’s remarks at the July regents meeting are available at: <http://www.ucal.us/bGWJnp>

“The numbers do underscore the university’s rare and defining ability to serve vast numbers of disadvantaged students, while still producing research of world-class quality.”

—Mark G. Yudof  
UC President

## UC launches new digital magazine for mobile devices

Astounding discoveries. New ideas. Better ways of doing things. Want to know more about how the University of California is reshaping the world?

Fiat Lux, UC's new digital Flipboard magazine for tablets and mobile devices, puts information about the latest UC ideas and innovations at users' fingertips.

"We are always looking for new ways to help Californians understand and appreciate the public value that UC brings to the state and the world," said Jason Simon, executive director of marketing and communications. "A digital magazine lets us reach important audiences where they are — on their mobile devices — and offers them an easy and engaging way to keep up with latest and greatest from across the UC system."

Flip through Fiat Lux and it quickly becomes clear that the range of



groundbreaking work going on across our campuses, medical centers and labs is truly staggering.

Readers can keep up with it all by downloading the free Flipboard app to their tablet or smart phone, and then searching for ucfiatlux or the University of California.

Flipboard works on both Apple iOS and Google Android devices for phone or tablet. Download it here: <http://flip.it/fiatlux>.

## UC's first woman president continued from page 1

standing interest in education, was the search committee's unanimous choice from among more than 300 prospective candidates.

UC Regent Sherry Lansing, who chaired the presidential search committee, called Napolitano a transformative leader and tireless champion for the life-changing opportunities that education provides. She and other regents praised her intellectual curiosity, political acumen, personal dynamism and willingness to tackle complicated issues as attributes that will serve her — and the University of California — well.

"As governor of Arizona, Napolitano was a strong advocate

for public education, from K-12 to the university level," said UC Regents Chair Bruce Varner. "She appreciates the importance of public research universities, faculty scholarship and research, and UC's role in shaping California.

"I am confident that she has the background and attributes needed to build upon the excellent work of her predecessor, Mark G. Yudof, and to lead the university forward to even greater achievements."

Read additional coverage of Napolitano's appointment at: <http://www.universityofcalifornia.edu/news/article/29782>



### Share Your Stories will return in our next issue.

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](mailto:NewDimensions-L@ucop.edu)) or regular mail (New Dimensions editor, 1111 Franklin Street, #7305, Oakland, CA 94607).

## New Dimensions

August 2013 / Vol. 30 / No. 3

*New Dimensions* is published by University of California Human Resources to provide news and information to UC retirees.

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### For benefits questions:

**UC Customer Service Center:**  
1-800-888-8267  
(8:30 a.m. to 4:30 p.m. PT)

**At Your Service:**  
[atyourservice.ucop.edu/retirees](http://atyourservice.ucop.edu/retirees)

### Are you moving?

To continue receiving *New Dimensions*, be sure to notify UC of your new address. You may change your address online: [atyourserviceonline.ucop.edu/asyo](http://atyourserviceonline.ucop.edu/asyo) or you may submit a *UC Benefits Address Change Notice*, available online at [atyourservice.ucop.edu](http://atyourservice.ucop.edu) or by calling the UC Customer Service Center at 1-800-888-8267.

## Emeriti/Retiree Association Contacts

Use the listings below if you want to join 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.

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

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### LLNL

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### UC Irvine Center for Emeriti and Retirees

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## New medical plans continued from page 1

UC Care also offers incentives for wellness activities.

The Blue Shield Health Savings Plan is a high-deductible PPO plan paired with a health savings account (HSA) that lets you pay for health care with tax-free dollars. UC provides an initial contribution and you can also make contributions. You can use the funds at any time for qualified medical expenses or save them for future health care needs. Your HSA has no “use it or lose it” feature, so your account balance carries over each year and continues to grow tax-free.

Blue Shield’s large provider network offers a wide choice of

doctors and hospitals or you can see out-of-network providers but you pay more.

Coverage under the Anthem Blue Cross PPO and PLUS plans and the Health Net HMO plan will end Dec. 31, 2013. Retirees in those plans must choose a new plan during Open Enrollment.

### Medicare Plans

Medicare-eligible retirees in California will have five plan options: Kaiser Senior Advantage, Health Net Seniority Plus, Blue Shield PPO, Blue Shield PPO without prescription drug coverage and Blue Shield High Option Supplement to Medicare.

The Blue Shield Medicare plans are very similar to the current Anthem Blue Cross Medicare plans. Medicare retirees in the Anthem Blue Cross PPO, PLUS and Core plans must choose a new plan during Open Enrollment.

For Medicare-eligible retirees living outside California, UC is taking a new approach. For those Medicare-eligible retirees with all covered family members in Medicare, UC will provide a contribution to a health reimbursement arrangement (HRA) to fund purchase of individual coverage through a Medicare Exchange. See below for more details.

At this writing, details on the medical plan offerings were still being finalized. In September, UC will launch a website dedicated to information about the 2014 medical plans. Visit At Your Service ([atyourservice.ucop.edu](http://atyourservice.ucop.edu)) for a link to the website where you can read more about each plan.

Also, watch for your Open Enrollment brochure, which will be mailed in mid-October.

Information about monthly premiums will be available closer to Open Enrollment, which begins Oct. 28 and continues through Nov. 26.



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### Want to go green?

Consider signing up for the electronic version of *New Dimensions*. Simply sign in to your personal account on At Your Service. Under the “Stay Connected” tab, choose “Newsletter.”



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## Medicare-eligible retirees living outside California to have new enrollment process, medical plan choices for 2014

UC is taking a new approach in 2014 to retiree medical care coverage for Medicare-eligible retirees and their families who live outside California.

This new approach offers retirees more choice, more value, more flexibility and more personalized support.

With the assistance of licensed and trained benefit advisors, **each covered family member will choose an individual plan that’s best for them.** That includes Kaiser, if available in the retiree’s location. With the growing market for individual plans, many retirees will have more choices, many of

which could meet their needs better than the UC plans currently available to them.

**Plus, UC will provide an annual contribution** under an HRA — health reimbursement arrangement — to pay for the Medicare plan. Depending on the plan choice, there could be funds left in the HRA to cover additional out-of-pocket costs and Medicare Part B premiums. If Medicare-eligible family members — such as a spouse or domestic partner — are covered, UC will contribute to the HRA for them also. The HRA contribution is subject to graduated eligibility rules.

To be eligible for this program, retirees and *all covered family members must:*

- Be eligible for and enrolled in Medicare Parts A and B
- Live outside California
- Be eligible for UC retiree health insurance

Retirees of Los Alamos National Laboratory and Lawrence Livermore National Laboratory are not eligible because the management groups for the labs provide their health benefits.

To assist retirees, UC has retained Extend Health, a specialist in helping retirees choose individual Medicare plans and providing

support after enrollment, including help with coverage, claims and network questions

Eligible retirees should watch for details in the mail. In late August, they will receive a packet of materials from UC, followed by more information from Extend Health.

### Questions?

Extend Health is ready to answer questions beginning Tuesday, Sept. 3. Retirees can reach Extend Health at 1- 855-359-7381 (TTY: 1-866-508-5123) Monday through Friday from 8:00 a.m. to 9:00 p.m. Eastern Time. Or go online at [www.extendhealth.com/uc](http://www.extendhealth.com/uc)