

BELI Status Qualification Codes

This supplement describes situations which affect an employee's benefits eligibility and provides the Benefits Eligibility Level Indicator (BELI) Status Qualification Code (SQC) that should be added to the employees' records.

Background

The Status Qualification Code (SQC) is a number used to identify employees in specific qualified situations to designate the appropriate eligibility status. The SQC will also prevent employees from being reported as out of compliance on BELI Control Reports (as described in GIR Administrative Supplement #2).

The designated department or local benefits/payroll entry person should enter the SQC into the Payroll Personnel System (PPS) when a qualified status situation begins and delete the SQC when the condition no longer applies.

The BELI SQC is used in addition to the BELI code. Additionally, there may be situations where two BELI SQCs should be used if two qualifying conditions apply. The Primary SQC applies to the condition which will last longest and the Secondary SQC may be used if another condition applies temporarily. A status qualification date should be used for each SQC representing when the qualified status begins.

General Information

A BELI SQC applies to UC-sponsored plans with continuing eligibility and disenrollment requirements as follows:

- Medical
- Dental
- Vision
- University-paid Life Insurance
- Short-term Disability Insurance
- Supplemental Disability Insurance

A BELI SQC does not apply to the following plans because these plans do not have continuing eligibility requirements:

- Supplemental Life Insurance
- Dependent Life insurance
- Accidental Death and Dismemberment (AD&D)
- Legal
- Dependent Care Flexible Spending Account (DepCare FSA)
- Health Flexible Spending Account (Health FSA)

The BELI SQC also identifies whether an employee must maintain a minimum appointment after establishing initial eligibility or whether benefits are blocked for the employee. See the *Qualified Status* explanations in the following sections.

The SQCs currently in use are as follows:

20 - Average Appointment Percent Employee (Academic)

25 – Academic Student Employee or Graduate Student Researcher

30 - Extended Sick Leave Recipient

40 – Transitional Work (Formally Approved)

60 - Seasonal Employee

90 - Sabbatical/Leave for Professional Renewal

A list of discontinued SQCs is included at the end of this supplement.

Qualified Status – Maintaining Eligibility

In the following situations, the SQC establishes initial eligibility, but the employee must meet ongoing minimum average regular paid time requirements in order to maintain benefits.

20 - Average Appointment Percent Employee (Academic)

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

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

The employee's manager should assign a BELI consistent with the average level of the appointment for the academic year. (July 1 through June 30). If the employment commitment is quarter-by-quarter, the initial appointment for the fall quarter must be evaluated separately with additional appointments treated as shown in Administrative Supplement No. 2.

25 – Academic Student Employee or Graduate Student Researcher

SQC 25 is for an Academic Student Employee (ASE) represented by the UAW or a Graduate Student Researcher (GSR) who meets the eligibility requirements based on title code and appointment

percentage (43.75% or more) to participate in the non-student UC-sponsored Dependent Care Flexible Spending Account (DepCare FSA) plan for faculty and staff employees permitted under the collective bargaining agreement. Continuation of the program is subject to collective bargaining.

Qualified Status - Benefits Are Retained

In the following situations, the SQC continues eligibility for benefits in effect before the qualified status, even if the employee's average regular paid time falls below required minimums. The assigned BELI in effect before the qualified status period begins should not be changed.

30 - Extended Sick Leave Recipient

SQC 30 is for an employee on extended sick leave (80% of regular pay) for a work-related disability covered by Workers' Compensation. An employee may continue benefits up to the six-month maximum period for extended sick leave. The status code of 30 should be deleted at the end of six months or when the employee returns to work in an eligible appointment - whichever is earlier.

40 –Transitional Work (Formally Approved)

Campus and laboratory officials may approve continuation of benefits during a period of approved transitional (either stay at work or return to work) employment. The status code of 40 should be assigned at the beginning of the period and deleted at the end of the period.

In this context, transitional work refers to an employee who has returned to work part-time at the University as part of an approved accommodation and whose time worked is such that benefits would otherwise be lost during the transitional work period. For example, the accommodation might consist of four months at 25% time, two months at 40% and subsequent periods at 50% or more time. To avoid loss of benefits while the approved plan results in less than 17.5 hours average regular paid time, the status qualification code is appropriate.

90 - Sabbatical/Leave for Professional Renewal

SQC is for faculty or staff enrolled in medical, dental, vision and/or Basic or Core life insurance who take an approved sabbatical leave or leave for professional renewal at reduced pay. They may continue this coverage for up to 24 months so long as their paychecks cover any required deductions. For dental, vision and Basic Life insurance, earnings during the leave also must be covered compensation for retirement plan purposes.

If the leave results in less than 17.5 hours of work per week, status code 90 should be assigned at the beginning of the period and deleted at the end of the period or at the end of 24 months from the date the leave originally began, whichever is earlier.

Qualified Status - Benefits are Blocked

In the following situations, the SQC indicates that the employee is not eligible for benefits.

60 - Seasonal Employee

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

The SQC should be deleted if the employee transfers to a non-seasonal position.

Adding, Changing and Removing a Status Qualification Code

When there is an initial assignment or reassignment of either a BELI or SQC, the employee's department should complete Form *UPAY 726 (Benefits Eligibility Level Indicator (BELI) and Status Qualification Code (SQC))* and submit it to the local benefits/payroll office. At some locations this information is passed electronically to the local benefits/payroll office.

The department or local benefits/payroll office should enter the new BELI and/or SQC(s) into the employee's record.

If there are Primary and Secondary SQCs and the Primary SQC is deleted, the Secondary SQC should be re-entered as the Primary SQC.

The local benefits/payroll office should review the SQC audit report (PPP6513 – Employees with BELI Status Qualification Codes) on a regular basis to ensure that employees' SQCs remain appropriate.

Discontinued Status Qualification Codes

The following SQCs are no longer used because there are no more employees in these categories or the employees in these categories were reassigned to other categories that may (or may not) need a SQC.

10 – Appointee with Ending Date for Funding Purposes Only

SQC 10 previously was applied to an employee appointed for at least 50% time and the Personnel Action Form indicated that the ending date is for funding purposes. Use of the duration code "B" now accomplishes the same purpose.

50 – Split Student/Non-Student Appointee Ineligible for Benefits

SQC 50 previously was applied to an employee with a casual/restricted appointment whose title was restricted to students (Class Title Outline 400-499). Under previous policy, the employee

was ineligible for benefits, regardless of the nature of the other appointments. Current policy allows benefits to be provided based on eligible non-student appointment.

70 – Phased Retiree

SQC 70 previously was applied to Phased Retirees who were permitted to continue medical, dental, vision and University-paid life insurance during the period of the phased retirement agreement. Current policy does not allow for phased retirement.

80 – “Grandfathered Employee”

SQC 80 previously was applied to a limited number of employees who were enrolled in medical, dental, or vision coverage at the time the BELI system was implemented and who otherwise would have been transferred to Core plans on January 1, 1990. There are no longer any members of this group.