

# Benefits for Domestic Partners

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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, your partner's 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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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

Read all requirements for health and welfare benefits and UC Retirement Plan benefits 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.
- A partnership that **has not been registered with the state** or other substantially equivalent jurisdiction 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 or other jurisdiction, there is an additional requirement to be recognized for UCRP benefits eligibility. The UCRP member must **either**:

- Enroll your partner in health benefits and successfully complete the verification process (enrolling your partner in benefits that do not require completion of the family member eligibility verification process will not establish your partner as your survivor for UCRP benefits) **or**
- Submit a *Declaration of Domestic Partnership for Purposes of UC Retirement Plan Benefits* (UBEN 250) to UC Retirement Administration Service Center 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 **separately and independently designate each other as survivor**. Enrolling your partner in health benefits as your family member establishes your partner as your survivor. Your partner must then submit a UBEN 250, signed by you and your partner, to designate you as survivor.

### ESTABLISHING YOUR PARTNERSHIP FOR HEALTH AND WELFARE BENEFITS

No declaration form or documentation is needed to initially enroll your domestic partner and/or your partner's children or grandchildren in health and welfare benefits, 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.

### ESTABLISHING YOUR PARTNERSHIP FOR UC RETIREMENT PLAN BENEFITS

If your domestic partnership is not registered, it is important for you to establish your partner as your survivor as soon as possible. **You may not establish your partner as your survivor for UCRP benefits after you have retired.**

If you are an active employee or receiving UCRP Disability Income, you may establish your domestic partner as your survivor for UCRP benefits (subject to additional eligibility requirements), by **any one** of the following methods:

- Registering your partnership with the state of California or other valid jurisdiction
- Enrolling your partner in health benefits **and** successfully completing the verification process (enrolling your partner in benefits that do not require completion of the family member eligibility verification process will not establish your partner as your survivor for UCRP benefits)
- Submitting a *Declaration of Domestic Partnership for Purposes of UC Retirement Plan Benefits* (UBEN 250) with appropriate supporting documentation.

See page 10 for details.

## 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”). For retirement plans other than UCRP (Savings Choice or UC’s voluntary Retirement Savings Program plans), you’ll name beneficiaries on myUCretirement.com.

## 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, or
- At least two of the documents below either as part of the eligibility verification process when enrolling your partner for health benefits or with a UBEN 250 signed by both partners if establishing eligibility for UCRP benefits only:
  - 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 as part of UC’s Family Member Eligibility Verification (FMEV) process.

**UCRP benefits:** If you have submitted documentation of your domestic partnership as part of the FMEV process for health benefits, no additional documentation needs to be submitted to establish your partner as your survivor for UCRP benefits (subject to additional requirements). If you have not submitted this documentation, or if your domestic partner is not enrolled as your family member in UC-sponsored health benefits, you will need to submit the required documentation with the UBEN 250 on 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.

**IMPORTANT:** Your domestic partner will not be eligible for UCRP survivor benefits if you pass away prior to retirement and have not established your domestic partnership for UC Retirement Plan benefits through one of the methods described on page 4.

## 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, the UC Retirement Administration Service Center could pay survivor benefits to a former partner instead of other eligible recipients, such as your dependent 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 disenroll your ineligible partner and your partner's children.

- Employees should complete and submit form UPAY 850 (*Enrollment, Change, Cancellation or Opt Out—Employees Only*) or make the change online on UCPath.
- Retirees and UCRP disabled members 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 or the UC Retirement Administration Service Center and visit the COBRA page at [ucal.us/COBRA](http://ucal.us/COBRA).

## Health and Welfare Benefits

### WHAT'S AVAILABLE

Your partner, and/or your partner's child or grandchild, may qualify to be enrolled as your family member in 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 and Welfare Benefits*, available on UCnet at [ucal.us/healthguide](http://ucal.us/healthguide), 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.

### TAX-SAVINGS PROGRAMS

UC offers an array of options for employees to pay for certain qualified expenses on a pretax basis. However, these only extend to your domestic partner and/or your partner's child or grandchild if those individuals are your tax dependents. For example, you may use the Dependent Care Flexible Spending Account (FSA) and Health FSA for your partner's expenses provided you claim your partner as a dependent for tax purposes.

### RETIREE AND SURVIVOR HEALTH BENEFITS

If you're eligible to continue your UC-sponsored medical, dental and/or legal coverage as a retiree or disabled UCRP member, your eligible partner (and your partner's child or grandchild) may be able to continue coverage as well. To learn more, see the *Retirement Handbook*, available at [ucal.us/retirementhandbook](http://ucal.us/retirementhandbook).

Similarly, if you are a member of the UC Retirement Plan (UCRP), your enrolled family members may be able to continue their coverage in the event of your death as part of their UCRP survivor benefits.

If you are a Savings Choice participant, you also may be eligible to continue your UC-sponsored medical, dental and/or legal

coverage as a retiree, and continue to cover your eligible family members. However, because Savings Choice participants are not UCRP members, your surviving family members are not eligible for UCRP survivor benefits, including the continuation of UC health and welfare benefits after your death. All UC-sponsored health and welfare benefits will terminate the end of the month following 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 *Your Guide to Survivor and Beneficiary Benefits for Family Members and Beneficiaries of Active UC Employees*, available at [ucal.us/survivorhandbook](http://ucal.us/survivorhandbook).

**If you die after retirement, or as a disabled UCRP member:** Your partner and/or your partner’s 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 *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](http://ucnet.universityofcalifornia.edu)).

## ENROLLING YOUR PARTNER IN INSURANCE PLANS

You may enroll your domestic partner and your partner’s 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 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)

See the table below for when and how to enroll your domestic partner and/or your partner’s child/grandchild in insurance coverage.

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 partner’s child/grandchild	How to enroll them
<b>Employee</b>	When you’re first eligible	Online
	During open enrollment	Online
	During your PIE (beginning when your partner first meets eligibility criteria)	For UCPath locations, enroll online during your PIE. For At Your Service Online locations, 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.  You can apply to enroll your partner and/or partner’s dependents in Dependent Life Insurance after your PIE, but you’ll be required to submit evidence of insurability.	
<b>Retiree or disabled UCRP member</b>  <b>Please note:</b> Retirees can add new domestic partners to their health and welfare plans following their retirement date, but these individuals will not be eligible for UCRP survivor benefits.	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 your partner's 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 your partner's health insurance. In order for your payroll records to accurately reflect this tax dependency, you'll need to report it to UC. See "What you need to do" below for details, depending on whether you enrolled in benefits through At Your Service Online (AYSO) or UCPath.

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 enrolled your family members in benefits through UCPath, you indicated whether they were your tax dependents during the enrollment process and your payroll records have been adjusted accordingly.

If you enrolled your family members in benefits through AYSO (currently or in 2018 before your location's transition to UCPath) and 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 or, for retirees or those collecting UCRP disability income, to the UC Retirement Administration Service Center. 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.

If you enrolled your family members in benefits through UCPath, you indicated whether your partnership was registered with the state of California during the enrollment process. If you enrolled in benefits through AYSO, use form UPAY 850 (*Enrollment, Change, Cancellation or Opt Out—Employees Only*), available at [ucal.us/UPAY850](http://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 and Welfare 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](http://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 and are eligible to retire—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**

If you are a UCRP member, you can choose, when you elect retirement, to designate your partner (or any person you choose) as your contingent annuitant. This will reduce your pension and provide a benefit to your contingent annuitant after your death.

In addition, if you were eligible for UCRP membership before July 1, 2013 (1976 Tier membership), there is an automatic post-retirement survivor benefit. Your eligible domestic partner will receive 25 percent of your basic retirement (50 percent if you are a member with non-coordinated benefits or a Safety member), with no reduction to your pension.

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. (If you were continuously in an eligible domestic partnership one year prior to retirement and you later marry your domestic partner, survivor income may still be payable provided the domestic partnership and marriage were continuous 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.)

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 your partner dies before the child.

# UC Retirement Plan Survivor Benefits

## 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.

For Savings Choice and UC's voluntary Retirement Savings Program plans, you'll name beneficiaries on myUCretirement.com. 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 you have enrolled your partner in health benefits for UC employees as your family member, and successfully completed the verification process:** Your partner has been automatically designated as your survivor. If you submitted documentation of your domestic partnership to verify your domestic partner's eligibility for UC health benefits, no additional documentation needs to be submitted.

Please note that enrolling your partner in benefits that do not require completion of the family member eligibility verification process will not establish your partner as your survivor for UCRP benefits. Benefits that do not require eligibility verification include:

- For all employees—life, accidental death and dismemberment and legal insurance
- For members receiving UCRP disability income—vision and accidental death and dismemberment insurance
- Postdoctoral Scholars Benefit Program
- Resident's Benefit Program
- Graduate Student Health Insurance Plan

**If you have not enrolled your partner in UC-sponsored health benefits that require eligibility verification, and 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. 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.

Send the document to:

UC Retirement Administration Service Center  
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.

The UC Retirement Administration Service Center will use the **date the state form was approved by the state 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 you have not enrolled your partner in UC-sponsored health benefits that require eligibility verification AND 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 5. Please note that both the UCRP member and your 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 your partner will not be eligible to receive survivor benefits.

You will need to submit the required documentation of your domestic partnership 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.

The UC Retirement Administration Service Center will use the latest 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.

If both you and your domestic partner are employees eligible for UCRP, you must **separately and independently designate each other as survivor.** Enrolling your partner in health benefits as your family member designates your partner as your survivor. Your partner must then submit a UBEN 250, signed by you and your partner, to designate you as survivor. Alternatively, you must each submit a separate UBEN 250, signed by both partners.

## Forms You May Need

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

\* 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/UCRP DISABLED MEMBERS**

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.**

You do not need to complete this form if:

1. You have registered your domestic partnership with the state of California, or
2. You have registered your domestic partnership in another jurisdiction and the partnership is substantially equivalent to a California-registered domestic partnership, or
3. You have enrolled your domestic partner for health benefits and successfully completed the eligibility verification process (enrolling your partner in benefits that do not require completion of the family member eligibility verification process will not establish your partner as your survivor for UCRP benefits)

Please note that for the purpose of UCRP survivor benefits, if both you and your partner are UCRP members, you must separately

and independently designate each other as a domestic partner. Enrolling your partner in health benefits as your family member establishes only your partner as your domestic partner for the purpose of UCRP survivor benefits. Your partner must then submit a UBEN 250, signed by you and your partner, to designate you as their domestic partner for the purpose UCRP survivor benefits.

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.

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### **EMPLOYEE/UCRP DISABLED MEMBER**

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

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### **DOMESTIC PARTNER**

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

**Send completed form to:**  
 UC Retirement Administration Service Center  
 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 or UCRP disabled members 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

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 (or UCRP disabled member) and the individual's 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) your partnership is registered with the state of California; (ii) your partnership is validly formed and registered in another

jurisdiction and the partnership is substantially equivalent to a California-registered domestic partnership; (iii) you have enrolled your domestic partner for UC health benefits as a family member and your partner's eligibility for these benefits has been verified; (iv) 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 or retiree 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/RETIREEES

Use this form to notify UC that your domestic partnership has ended if you established your partnership with UC by:

- Submitting form UBEN 250 or
- Enrolling your partner in UC health benefits and successfully completing the eligibility verification process

Do not use this form if your domestic partnership is registered with the state of California or if your 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 are terminating a partnership that was registered with the state of California or another jurisdiction as described above and you submitted a copy of the appropriate registration form for UC benefit purposes, you must submit:

- For partnerships registered in California—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 partnerships validly formed and registered in another jurisdiction and 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

For registered partnerships, 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/UCRP disabled members:** 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/UCRP DISABLED MEMBER**

..... Name (Last, First, Middle Initial) (Please Print)

..... Social Security Number

..... Signature

..... Date

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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 and Programs, University of California Office of the President, 1111 Franklin Street, Oakland, CA 94607.



