

New Dimensions

Benefits Newsletter for UC Annuitants

Volume 15 Number 1, Spring 2000

Tidal Wave II

This article is reprinted from The Berkeleyan

Higher education faces flood of students—

UC and counterparts nationwide cope with rising enrollments, tighter space.

Boom, tidal wave, surge. Whatever the terminology, educators are bracing for substantial college enrollments in the coming decade, not just in California but across most of the country.

The prospects are sending educators and policy-makers into overdrive as they wrestle with how to accommodate more than 2 million new full-time students expected at public and private colleges and universities nationwide by 2010. Between 1995–96 and 2011–12 the number of high school graduates will increase 31 percent in the West, 10 percent in the North-Central region, 17 percent in the Northeast and 23 percent in the South.

At the January 20 UC Board of Regents meeting, the University of California provided the first glimpse of what the UC system is facing. Regents were told that to meet growth demands through 2010 the system

must plan—and secure state funding—for 63,000 students more than currently enrolled.

Beyond issues of physical space, facilities, faculty, staff and necessary services, the projections raise a major question about whether all eligible for college admission will find a seat in the classroom. Leaders holding the reins of public education must find ways to make way for the additional students, or degrade a key element in the American dream.

And the clock is ticking.

“There’s not a lot of time. The rubber is going to hit the highway pretty soon, and I just don’t think the states have really thought through what happens...” said Cheryl Blanco, director of policy and information for the Western Interstate Commission for Higher Education. California is one of the few already preparing, she said.

Source of surge

Population growth alone is expected by the year 2015 to account for more than four million additional college students than educated nationwide in 1995, according to a report by the Commission on National Investment in Higher Education. Growth reflected by record elementary and secondary school enrollment in the United States in the 1990s is expected to continue surging in the coming decade.

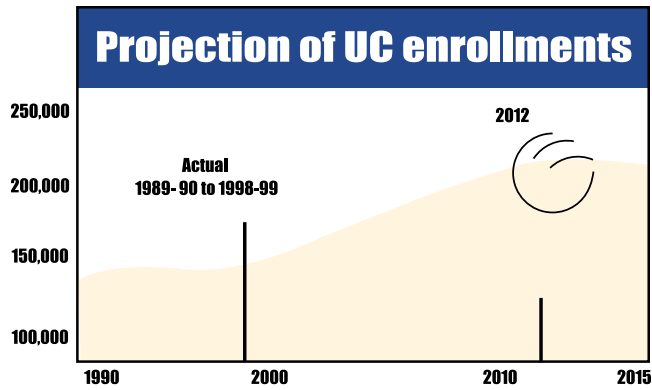
American Demographics magazine reported in June that the population boom will not echo evenly everywhere. Regional economies, varying fertility rates and inter-state migration are among the critical variables.

West Virginia, Kentucky and Indiana, for example, should feel the impact of declining or negligible birth rate changes. But out West, only Wyoming

Tidal Wave II

Tidal Wave II is the name given by former UC President Clark Kerr to the expected swell in enrollment facing the University of California system and institutions nationwide. The children of the Baby Boom generation are filling junior high and high school classrooms now, and higher education is faced with finding space and other resources.

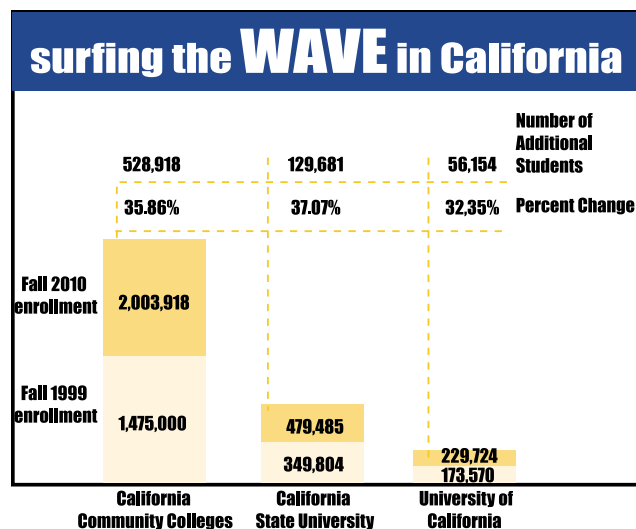
and North Dakota expect declining numbers of high school graduates. Meanwhile, California, Texas and Florida will experience the results of a disproportionately high percent of birth increases.



The Western Interstate Commission for Higher Education cites statistics indicating California, Arizona, Colorado, Washington and Nevada will see enrollment soar by 25 to 35 percent by 2008.

California's public colleges and universities face unprecedented student growth in the next 10 years with enrollment swelling by an estimated 700,000 new students.

UC systemwide faces an increased enrollment of almost 63,000 full-time students, or 43 percent. This equals the system's total enrollment growth over the preceding 30 years, and matches current enrollment at UC Berkeley and UCLA combined.



Enrollment is forecast to jump 36 percent at California community colleges and 37 percent at California State University campuses.

Sandra Smith, UC's assistant vice president for planning and analysis, said 39,000 of the new wave had been expected and is addressed in system expansion plans. UC already is developing its 10th general campus, UC Merced and Governor Gray Davis has asked that it open a year early, in 2004. It will enroll 5,000 students by 2010.

Meeting the challenge across the system will, of course, require a sustained commitment of resources. For instance, UC campus growth, along with needed renovation and seismic projects, will require \$500 million per year in capital funding. The university will need to hire approximately 3,000 new faculty members for enrollment growth alone. Student services will likewise require expansion.

CAMPUS	1998-99	2010-11	Average Annual Growth Rate
Berkeley	27,800	31,800	1.1%
Davis	20,300	26,400	2.2%
Irvine	15,700	27,600	4.8%
Los Angeles	28,500	32,900	1.2%
Merced		5,000	
Riverside	9,550	19,900	6.3%
San Diego	16,850	27,600	4.2%
Santa Barbara	17,880	21,900	1.7%
Santa Cruz	10,420	16,900	4.1%
TOTAL UC	147,000	210,000	3.0%

Degree dreams

Add to population trends the growing value placed on the college degree. National college-going rates show 65 percent of recent high school graduates enroll in college the next fall.

Maybe it started with the GI Bill after World War II, boosting college education by underwriting costs. The increase in financial aid grants and loans that became available in the '60s and '70s is another ingredient. Although the U.S. population only doubled since 1930, higher education enrollment increased seven times, according to the Commission on National Investment in Higher Education.

A 1996 report by the Hudson Institute Policy Research Center in Indianapolis traced higher education enrollment from 1.5 million students in 1,700 institutions after WWII to 3.6 million students in 2,000 colleges and universities 20 years later. The report calls the U.S. higher education

system “indisputably the world’s post secondary superpower.”

“As long as a college education remains an enormous value in the job market and a person’s life, the demand for it is not going to decline,” said Smith.

New options

To deal with that demand, colleges across the country are exploring options such as:

- UC is looking at added off-campus enrollment in study-abroad programs and distance learning, as well as accelerating by one quarter or one semester the time taken to graduate. More courses may be added at night, late afternoons and weekends.
- The Western Governors University is an on-line university operated by a consortium of states. Participating states set up local centers with counseling and technological aid.
- At Northern Arizona University, some students may attend large lecture courses via the Internet. Some schools require students to take a certain number of units via distance learning.
- Joint-use facilities. In Nevada, the K-12 schools are linking with community college campuses in Reno and Las Vegas.
- Sending more students to summer school. The Florida Legislature passed a law in the 1980s requiring college students to attend at least one summer session.
- Dual enrollment in high school and college, enabling new high school graduates to amass college credits before enrolling full-time.
- Capping the number of credits students can earn, or limiting units required for a baccalaureate degree. In the past, Montana’s legislature ordered students to pay full rather than state-subsidized tuition if they take more than a set number of units.
- Enacting tougher eligibility standards or raising fees. Such legislative actions may be politically unpopular but nevertheless can effectively limit enrollment.

Tidal Wave II was written by Kathleen Maclay and produced by the UC Berkeley Office of Public Affairs.

Title Wave II—Q&A

Q: Where do these UC enrollment growth numbers come from?

A. The projected enrollment by the Office of the President was based on several factors and includes new freshmen, transfer students and a growth in graduate students.

The new freshman estimates come from projections by the Demographic Research Unit of the Department of Finance. They are based on the number of high school students graduating between now and 2010. UC plans to enroll at least the same proportion of California high school graduates in the future as it does now.

The estimate of transfer students is based on a systemwide memorandum of an understanding with community colleges that will increase community college transfers by 40 percent to 14,500 per year.

The graduate student enrollment reflects the number of graduate students UC faculty say is necessary to maintain the quality and character of the research university education and to continue to do research that significantly contributes to California’s economy and quality of life.

Q: Why is the rate of growth higher than expected?

A. The university had planned for growth, projecting an estimated 39,000 additional students through 2010. The current projection of 63,000 additional students systemwide reflects, among other factors, a turn around in the California economy that had triggered more than anticipated population growth and stronger demand for college participation.

Q. How did UC decide how many students each campus should absorb?

A. The Office of the President determined that a proportional distribution of the additional enrollment growth based on each campus’s long range development plan would be the most reasonable allocation. Already UC Riverside is expected to grow by 108 percent through 2010, and Irvine and San Diego also are planning for major growth of 76 percent and 64 percent

respectively. It said that to ask a few of the campuses to accommodate all the growth would be unreasonable and could jeopardize the quality of the academic programs.

Q. Are the numbers in the chart “How Each Campus May Grow” final?

A. None of the campus numbers are final, and there may be some changes made as campuses and local communities work through the public review process of new long range development plans. The Office of the President, however, believes the estimate of 63,000 additional students systemwide will remain firm.

Q. How are the campuses to pay for the faculty who will teach these additional students and for the services and facilities they will need?

A. The Office of the President has said that funding for capital improvements and on-going operational costs are the responsibilities of the state as a whole.

Further, the study committee at Berkeley appointed by the chancellor stated one of its planning principles as: “The first call on the funding we receive for increased enrollment must be to cover the costs of instruction, including administrative overhead and student services.”

Q. What happens after 2010? Is more growth expected?

A. The current projections call for a leveling off of the rate of enrollment growth after 2010.

UCTV Takes to the Airwaves

Dedicated to Educational and Enrichment Programming

The University of California announced on January 13, 2000, that it has launched its own public interest television channel (UCTV), capable of reaching more than three million viewers on prime time television seven days a week throughout North America.

“This is an important milestone for the University of California,” said UC President Richard C. Atkinson, a prime proponent of inviting the public to find out more about UC through new electronic media.

“Chancellors of the ten UC campuses share my excitement over this new opportunity to serve California and the nation. In an era of 90-second news stories, there is a real need for in-depth coverage of ideas and issues that affect the lives of people everywhere,” he said.

The channel is available on EchoStar’s Dish Network satellite television service. UCTV is broadcast on channel 9412 and is available to viewers with a satellite dish antenna pointed at 119 degrees West Longitude.

The charter of the program is to use the resources of UC to inform, educate, and enrich the lives of viewers throughout the nation. The channel will broadcast faculty lectures, interviews, research symposia, distinguished speakers, and artistic performances 24 hours a day, seven days a week.

“It was a major accomplishment to get this program up and working under a tight deadline. We look forward to working on the quality of the broadcasts so that viewers will turn to our channel first for in-depth information,” said Julius Zelmanowitz, UC interim vice provost of academic initiatives, who helped prepare and submit the UC proposal to EchoStar.

Zelmanowitz said that UCTV will allow UC faculty to share the results of their scholarship and cutting-edge research directly with the public across a broad range of subject areas.

The UC channel schedules blocks of time both for thematic subjects—science, technology, health, arts, public affairs and humanities, for example—and for individual campuses.

Programs are broken into two four-hour blocks for an eight-hour total during East Coast prime time, 3 p.m. to 11 p.m. In the short term, a bulletin board with pertinent UC facts and information will fill remaining time. The programs airing on UCTV also will be broadcast live on the Internet (www.uctvonline.org).

Current programs include a discussion of global change by UC Irvine’s Nobel Laureate F. Sherwood Rowland, a gamelan ensemble concert from UC Riverside, a film historian’s research from UC San Diego on all-black westerns, and a UCLA professor’s study of sabertooth cats.

UCTV will build on the success of a broadcast channel developed by the University of California at San Diego seven years ago. Today, UCSD-TV (Channel 35) serves one million homes in San Diego and provides programming to other stations around the country, including stations in New York City, Seattle, Palo Alto and Washington, D.C.

“UCSD has long supported the use of broadcast programming to give the general public access to knowledge, ideas and entertainment from both the campus and the local community,” said its chancellor, Robert C. Dynes. “The success and value of UCSD-TV, now in its seventh year, is the model for

UCTV and we are pleased to play a key role in the development of unique and innovative broadcast capabilities for the UC system.”

It is expected that UCTV, like UCSD-TV, will focus on UC activities, but also will develop programs through partnerships with community organizations. Currently, UCSD-TV partners with the San Diego City Club, the San Diego Union-Tribune, Natural History Museum, San Diego Opera, Old Globe Theatre and many other organizations. UCTV will expand the model around the state.

“UCTV will help us meet our commitment to improve K-12 education. UC programs can help K-12 teachers in their classroom work and in staying up-to-date on the newest developments in their disciplines. And in the near future, students and their parents may only have to turn to our channel to get information on admissions and course requirements for access to college,” said Atkinson.

The UCTV channel enables EchoStar to meet its obligation to set aside four percent of its airtime for public interest education programming, under Federal Communications Commission rules based on the 1992 Federal Cable Act.

Schedule of Featured Programs on UCTV:

Broadcast Times:	3:00–7:00 p.m.	7:00–11:00 p.m.
Monday	Humanities	Health
Tuesday	Arts	Science
Wednesday	Health	Public Affairs
Thursday	Science	Business and Law
Friday	Public Affairs	Humanities
Saturday	Business and Law	Arts
Sunday	Highlights of the Week	Highlights of the Week

Note: As this newsletter was going to press, UCTV announced an additional four hours of daily programming from 7:00–11:00 a.m.

The Mentor Program and Students In Business

A nonprofit group in California's East Bay is working to make life better for young people. The Mentor Project, in conjunction with local school districts, works to pair caring adult volunteers and at-risk students in one-to-one mentoring relationships. It has been shown that students with mentors gain the skills and self-confidence necessary to go on to more rewarding futures.

Mentors are matched with same-sex students for ten academic months and are asked to spend four to six hours per month with their student. The time can be spent focusing on schoolwork, job shadowing, going to museums or on other outings, or just talking. Surveys show that over 90 percent of students sign up for the program to have someone to listen to them, and to advise and support them.

Students in Business, Inc. (SIB), based in Fremont, California, is a nonprofit organization that sponsors

the Mentor Project. SIB was recently awarded several state grants, requiring the match of 200 students and mentors in Fremont, Hayward, San Lorenzo and San Ramon Valley School Districts, and Castlemont High School in Oakland. SIB is currently searching for mentors to fulfill the grants.

The success stories from this program are innumerable. As one student wrote last year: "It seems like now, things are really starting to come together. I'm not nearly as confused as I was before. I'm well on my way to being the first person in my family to graduate from college."

If you would like more information about Students In Business or the Mentor Project, please call Kathy Morrison at 510-795-6488, ext. 6175, or e-mail her at kmorrison@beamentor.org. You may also visit the Mentor Project website (www.beamentor.org).

Taxing of Pension Income

Effective January 1, 1996, Public Law 104 prohibits states from taxing the pension income of former residents. The law applies to annuity payments and/or lump sum distributions paid after December 31, 1995.

In general, no state may impose income tax on any retirement income of an individual who is no longer a resident of that particular state.

Because UC reports all annuitant pension income to the Internal Revenue Service under the umbrella term "University of California," certain annuitants who do not live in California may receive a notification letter from the California State Franchise Tax Board requesting them to pay state income tax.

If you are a Los Alamos National Laboratory (LANL) annuitant and receive such a request, please contact the LANL Benefits Office. The Benefits Office will forward you a letter that you can send to the California State Franchise Tax Board stating that you have never resided in the state of California.

If you retired from any other UC location, and are permanently living out of the state of California, you may:

1. change your current tax withholding election for your University of California Retirement Plan monthly retirement income (see page 7), and
2. respond directly to any inquiries you may receive from the California State Franchise Tax Board.

Life Events

Providing benefits for your family members and beneficiaries is an important part of the University's comprehensive benefits program. The UC-sponsored health, welfare, savings and investment plans are all part of a large University umbrella that covers you and the people dearest to you today and in the future.

A topic often put off when we're younger and a difficult one to discuss and plan for even as we grow older, is our own death. Do you know what benefits will be available to take care of your family members and beneficiaries when you die? Hopefully the following information will alleviate some fears, answer some questions, and help you take the steps necessary to provide for your family.

Benefits available through UC might include monthly income paid by the University of California Retirement Plan (UCRP), continued medical and dental coverage for family members, savings or investment accounts (such as 403(b) Plan contributions), and life insurance proceeds. If you want to better understand the benefits the University provides for your survivors, you can use the enclosed postcard to request one of the Survivor and Beneficiary Handbooks. In addition to describing the various benefits, the handbooks answer commonly asked questions.

There are three versions of the Survivor and Beneficiary Handbook, one for UC employees, one for former employees, and one for annuitants (retirees and those receiving UCRP disability income).

We also have a new advisory booklet, *Preparing for the Inevitable*, which was created to help you and your family prepare for your death and assist your survivors in taking appropriate action following your death. The booklet includes a proposed outline for organizing and recording your personal and financial information along with other advice on what you can do now to make things easier for your loved ones. *Preparing for the Inevitable* is based on a brochure by Richard W. Gable, Professor Emeritus, UC Davis, which he originally prepared for the UC Davis Emeriti Association.

You can request a copy of any of these by returning the enclosed postage paid postcard. These booklets are also available on the UCbencom website under "Life Events." We hope you and your family will find these to be a helpful resource.

Attention Non-California Residents

Current federal legislation prohibits states from taxing nonresident pensions, but your tax withholding election for University of California Retirement Plan (UCRP) monthly income remains in effect until you change it. UC HR/Benefits must have your signature in order to change your tax withholding election. You may make changes by submitting a new *Tax Withholding Election for UCRP Income* (UBEN 106) form.

The fastest way to get a copy of the form is to download it from our UCbencom website (www.ucop.edu/bencom), then select the button "Online Forms." Submitting a new form revokes your previous election. You may also request a form by calling UC HR/Benefits Customer Service at 1-800-888-8267.

Generally, UC HR/Benefits must receive your form by the 7th of the month to affect the upcoming monthly retirement income check.

Surepay Deposit and Check Mailing Dates

The following are the Surepay deposit dates and the check mailing dates for UCRP annuitant checks during the rest of 2000.

April 26	September 27
May 26	October 27
June 28	November 28
July 27	December 28*
August 29	

* Surepay deposits will be posted January 2, 2001. Annuitant checks will be dated January 1, 2001, but will be mailed December 28, 2000.

UC Retirement Savings and Investment Plan News

We have received a number of requests for more information in *New Dimensions* about the UC savings and investment funds and how you can access information about your account(s) in the Defined Contribution and

Tax-Deferred 403(b) plans. From now on, look for this type of information in future issues of this newsletter, and please let us know of any other information along these lines that you would like to see.

UC-Managed Investment Funds

Performance Results

Since November 30, 1999, the UC-managed investment funds have generated the following monthly unit values and interest factors:

At:	The unit value was:			The interest factor was:		
	Equity	Bond	Multi-Asset	Savings	ICC	Money Market
November 30, 1999	\$296.957	\$106.912	\$27.738	.4813%	.5562%	.4541%
December 31, 1999	313.281	106.130	28.363	.4960	.5762	.4840
January 31, 2000	307.166	106.749	28.226	.5045	.5743	.4858
February 29, 2000	315.359	109.749	28.723	.4762	.5307	.4673

Rates of Return as of February 29, 2000

	Annualized		
	1-year	5-year	10-year
Total Return Funds			
Equity	26.50%	23.30%	17.69%
Bond	-1.25	12.44	11.25
Multi-Asset	11.94	13.27	N/A
Income Funds			
Savings	6.02%	6.21%	6.99%
Insurance Company Contract	6.96	7.49	8.01
Money Market	5.38	5.63	5.46

The investment returns shown here represent past performance and are not necessarily indicative of future results.

Participants with Internet access can also get the latest investment performance results for the UC-managed funds by visiting UC's benefits website (www.ucop.edu/bencom); click on the Retirement and Savings icon, and then select

"Tax-Deferred 403(b) Plan and Defined Contribution Plan." The UC funds are valued monthly, and we post the new unit values and interest factors on our website around the 10th of each month.

Year 2000 403(b) and DC Plan Distribution Schedule

As of January 2000, UC HR/Benefits no longer requires participants to fill out a form to request a distribution from the DC and 403(b) plans. Most distribution requests can be made efficiently and effortlessly by calling the Distribution Line on bencom.fone (1-800-888-8267). In fact, you should be aware that if you submit a form when you could use the Distribution Line, we will return the form to you with instructions for using the Distribution Line. This may result in processing delays.

Participants should use the Distribution Line to request straightforward distributions from UC's DC and 403(b) plans. Generally, these will be requests from Plan participants who no longer work for UC, live within the United States, and want their UC money paid to them or directly rolled over to an IRA or other employer plan.

If you anticipate the need for a distribution from your 403(b) Plan or DC Plan accounts, please plan ahead. For example, if you want a check issued in June, then UC HR/Benefits must receive your distribution request by May 21. UC HR/Benefits will not generally grant exceptions to these procedures.

When you are ready to request a distribution:

1. Call 1-800-888-8267 and press 1.
2. From the Entry Menu, press 2 to reach the Distribution Line.
3. Enter your Social Security number and your UC PIN.

Do not hang up until you hear the confirmation number. You will be sent an acknowledgement statement by mail or fax, whichever you prefer.

Processing Dates. The cutoff date for processing DC Plan and 403(b) Plan distribution requests through the Distribution Line is the 21st of each month. Distribution checks generally are issued on the 23rd of the following month. Plan accumulations are valued at the end of the month prior to the date the distribution is paid. For example, a check issued in June is based on the fund value as of the last business day in May 2000.

403(b) Plan and DC Plan Distribution Schedule

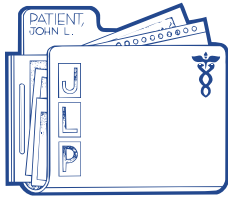
April 24	September 22
May 23	October 23
June 23	November 22
July 24	December 22
August 23	

UC Account Balances Online

As of February 2000, participants in UC's Defined Contribution and Tax-Deferred 403(b) plans can now see their current Plan balances online by visiting UCbencom (www.ucop.edu/bencom). The site is updated monthly to reflect gains/losses in the value of participants' accounts in the UC-managed investment funds. Account activity such as 403(b) Plan distributions and any other adjustments are reflected approximately four times a month.

To view your UCRS account balance(s) on UCbencom, simply click on the "UCRS Account Balances" icon on the right-hand margin of the home page. To access this particular application, you will need to enter your Social Security number and your UC Personal Identification Number—your UC PIN. If you never received your PIN or have lost or forgotten it, call UC HR/Benefits Customer Service at 1-800-888-8267.

Another technological triumph looming on the horizon is one we'll be especially pleased to debut—online fund transfers between the UC-managed funds. This feature will allow participants to transfer their money from one UC fund to another without having to fill out a form. Look for announcements of the official "launch" of online transfers on UCbencom or in this newsletter in the near future.



UC's Medicare Corner

Useful websites: Medicare—www.medicare.gov Social Security—www.ssa.gov

Discount Prescriptions for Medicare Enrollees in California!

On February 1, 2000, the “discount prescription medication program” (SB 393 sponsored by State Senator Speier) was implemented. This law allows Medicare enrollees who now pay retail prices for their prescription medications to buy those medications at lower Medi-Cal rates. The law also may benefit Medicare enrollees in a UC-sponsored plan by allowing them this same option. It requires all pharmacies participating in the Medi-Cal program to charge Medicare enrollees the same discount price as Medi-Cal recipients (there is also a \$0.15 processing fee per prescription). This discount program does not apply to over-the-counter drugs or to compounded drugs that must be mixed by the pharmacist.

Anyone who has a Medicare card is eligible. There are no forms to fill out. Every month, Medi-Cal establishes a Medi-Cal price for **all** drugs in the market. Medicare patients need only show their cards at pharmacies that fill Medi-Cal prescriptions to get **any** prescription for any drug in the market filled at the Medi-Cal price.

The following describes how the law should impact UC employees, annuitants, and/or their family members who are enrolled in Medicare and in a UC-sponsored medical plan and have their prescription filled in California:

Core and the High Option Plans: Members should pay the Medi-Cal discount price for the drug, then submit a claim to the plan for reimbursement.

UC Care and all HMOs: Members should pay the normal plan copayment; however, if a member presents a Medicare card in addition to the plan card and the pharmacy finds that the Medi-Cal discount price is less, the member will be charged the lesser amount.

The following questions are selected from the **Medi-Cal Update—Pharmacy, Bulletin 479**, Frequently Asked Questions.

Q. Who is eligible?

A. Anyone who has a Medicare card is eligible. That includes seniors over age 65 and those under age 65 who are disabled and have a Medicare card. You do not have to be on Medi-Cal.

Q. What drugs are covered?

A. Virtually every prescription medication is covered. There is no restricted formulary and there is no prior authorization. However, over-the-counter drugs are not covered under this new program.

Q. Can I go to any pharmacy I want to get the Medi-Cal price?

A. Only Medi-Cal pharmacy providers are required to charge a Medicare recipient the Medi-Cal prescription rate. The vast majority of pharmacies in California (over 5,000 pharmacies) participate in the Medi-Cal program. You may want to ask your pharmacy if it is a Medi-Cal provider. Additionally, a non-Medi-Cal pharmacy may be willing to charge a similar prescription rate.

Q. What if I already have prescription coverage, will this new program affect it?

A. You should continue to use your current insurance coverage if it is more advantageous to do so. This new program should not affect your current prescription coverage. The new program is intended for any prescription whose entire cost is paid for by the Medicare enrollee.

For example:

- If you have reached your yearly or monthly prescription limitation under your insurance program, and now have to pay for your prescriptions, you may want to use this new program.
- If your prescription insurance coverage doesn't cover a certain prescription drug, you may want to use this new program.
- If you have a deductible to meet before your coverage begins, you may want to use this new program.

Q. Will this program affect my Medicare coverage?

A. No, this program does not affect your coverage under the Medicare program.

To learn more about the new law and review all of the questions and answers, go to UC's benefits website (www.ucop.edu/bencom) and click on "Attention Medicare Enrollees in California" listed under "What's New."

UC Survey of Medical Plan Member Satisfaction

The University is working with DSS Research to conduct a member satisfaction survey of certain UC-sponsored medical plans. (DSS is an independent research firm located in Arlington, Texas.) The survey, scheduled to be issued in early April, will measure member satisfaction during calendar year 1999. A pre-survey notification letter is scheduled to be mailed to survey participants on March 30.

Now in its third year, the survey will be sent to approximately 15,000 randomly selected UC members enrolled in Heath Net, Kaiser, PacifiCare, UC Care, Western Health Advantage, BluePremier HMO New Mexico, and in BluePremier POS "in area" benefits.

UC medical plan members who may receive the survey include UC employees, annuitants, and their family members who were 18 years or older as of December 31, 1999. Members whose primary medical coverage is through Medicare will not be receiving the survey.

Results for all of our medical plans included in the member satisfaction survey will be available in the fall. The results of the survey will help employees and annuitants evaluate their medical plan choices when choosing a plan during Open Enrollment in November.

UC Care Members— Accessing your Prescription Coverage

Employees, annuitants and family members enrolled in the UC Care medical plan: When you fill or refill a prescription in 2000, be sure to tell the pharmacist that your prescription drug carrier changed from Merck-Medco to Prudential HealthCare (PHC) beginning January 1, 2000. Otherwise, your pharmacist may tell you the prescription is denied by your insurance plan!

PHC has alerted its contracted pharmacies about this change, and once the pharmacies update their systems, your access should be validated automatically. Until then, showing your UC Care

identification card should solve any problem. The pharmacist can use the toll-free number found on the card (1-800-313-3804) to verify your eligibility and revise your "patient profile" record accordingly.

Note: This process does not apply to mail order maintenance drugs, which are now available through Integrated Pharmacy Solutions, Inc. To request order forms, call in your prescription refill, or check on the status of your order, call Integrated Pharmacy Solutions Customer Service at 1-800-732-2165.

Long-Term Care Insurance Info

Generally, medical insurance and/or Medicare do not cover long-term care needs. Some long-term care policies may provide a daily payment for nursing home care, while others cover hospice programs.

If you are interested in long-term care insurance, a wealth of information is available to address such issues as:

- Defining what long-term care is;
- Whether you need long-term care insurance;
- What to look for in a policy; and
- How to find out the benefits, the costs, and their appropriateness for you and/or your family members.

Publications and Information

The NAIC (National Association of Insurance Commissioners) offers a booklet called “A Shopper’s Guide to Long-Term Care Insurance.” For a copy (the first copy is free), write to: NAIC, 2301 McGee Street, Ste. 800, Kansas City, MO 64108, or visit their website (www.naic.org).

UC staff who reviewed this booklet found that it gave them a basic understanding of this topic as well as helpful tips for evaluating policies.

California Department of Aging

Provides a packet of materials, telephone counseling, and face-to-face counseling throughout the state.

Medicare enrollees, call toll-free: **1-800-434-0222, 9:00 a.m.–3:00 p.m., PT.**

If you are not enrolled in Medicare, call toll-free: **1-800-510-2020** to be automatically transferred to a senior services office in the county from which you are calling. The website address is: www.aging.state.ca.us

New Mexico Department of Aging

Telephone: **1-800-432-2080** (within New Mexico only) or **1-505-827-7640** for information, or visit the website (www.nmaging.state.nm.us).

AARP (American Association of Retired Persons)

AARP members aged 50–79+11 months can obtain long-term care information by calling **1-800-452-1393**, or by visiting their website (www.aarp.org).

Policies

CalPERS (California Public Employees’ Retirement System)

CalPERS is offering another opportunity for UC employees and annuitants to sign up for its long-term care program. The new application period begins on April 1 and runs through June 30, 2000.

The CalPERS Long-Term Care Program provides quality coverage that is more affordable than before. All premiums are age-related. The younger you are, the less a plan costs. You may request a free application kit on the Internet (www.calpers.ca.gov/longtermcare) or by calling **1-800-338-2244** today.

TIAA-CREF (Teachers Insurance and Annuity Association—College Retirement Equities Fund) Teachers Long-Term Care:

You may enroll in the long-term care insurance plan at any time during the year by calling **1-800-223-1200** and pressing 4. Office hours at TIAA-CREF are Monday through Friday, 8:00 a.m.–11:00 p.m., ET. You may also visit their website (www.tiaa-cref.org).

In the Mail

Look for the following mailings through April

IRS Forms 1099-R Mailed

Internal Revenue Service Forms 1099-R were mailed to annuitants of the University of California Retirement System (UCRS) during the last week of January. The statements contain information about your retirement income and any other distributions that you may have received in 1999. Your Form(s) 1099-R should be submitted along with your federal and state income tax returns.

If you have not received your Form(s) 1099-R statement(s), please call UC HR/Benefits Customer Service at 1-800-888-8267, Monday through Friday, 9:00 a.m. to 4:00 p.m. Please note that if you have questions about your tax situation, please see your tax advisor.

W-2 Forms Mailed for Imputed Income

W-2 forms were mailed to approximately 85 annuitants reporting imputed income on which they must pay 1999 federal and state taxes. The imputed income represents UC's contribution toward 1999 medical and/or dental coverage for the annuitant's same-sex domestic partner and/or the partner's child or grandchild, in cases where the partner or child is not the annuitant's tax dependent.

Editor's Note:

The scope of this newsletter is continuously evolving. In this issue we include articles such as "Tidal Wave II" and "UCTV Takes to the Airwaves" to provide you with a glimpse of the impact UC has at the state and local level, and to keep you abreast of changes ahead.

UC Medical and Dental Plan Carriers

Most carrier mailings for the new plan year have now been completed. If you have not received a new medical plan evidence of coverage card and believe you should have, please contact the carrier directly.

Semi-Annual Statements

Participants in the Tax-Deferred 403(b) Plan and the Defined Contribution Plan should already have received a semi-annual statement for the year ending December 31, 1999.

For related information on reviewing your current balances online, see page 9.

Request for Tax Verification

The annual Request for Tax Verification will be mailed to employees and annuitants in late March. UC requests tax records from employees and annuitants whose family members (enrolled in UC's group insurance plans) include those for whom tax dependency is a requirement of eligibility. Tax dependency is required for these family members: adult dependent relative; stepchild; legal ward; grandchild; child or grandchild of a same-sex domestic partner; disabled child age 23 or older; "other" child enrolled before 9/1/94. The tax records will be due in late April 2000.

Veterans Day

Beginning in November 2000, Veterans Day will become an official University of California holiday. This year, since November 11th falls on Saturday, the preceding Friday, November 10th, will be observed by the University community. UC HR/Benefits Customer Service will be closed during normal business hours on that day.

Annuitant Newsletter on Audio Cassette

This newsletter is available on audio cassette tape for visually impaired and disabled annuitants. If you are interested, call *New Dimensions* at 1-800-239-4002, extension 70270, and leave your name, address, and phone number. Please indicate that you want to receive *New Dimensions* on tape. Please note that audio cassette tapes are generally mailed four weeks after each *New Dimensions* mailing.

New Dimensions

Volume 15 Number 1, Spring 2000

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

Editor: Janie Kirsch

Contributors: Mary Spletter, Yvonne Anderson, Patril Southworth

Design/Layout: Kathy Kirkpatrick

UNIVERSITY OF CALIFORNIA HUMAN RESOURCES AND BENEFITS

300 Lakeside Drive, 5th Floor
Oakland, CA 94612-3557

Associate Vice President: Judith W. Boyette

Director, Communications and Training: Barbara Facey

By authority of The Regents, University of California Human Resources and Benefits, located in Oakland, administers all benefit plans in accordance with applicable plan documents and regulations, custodial agreements, University of California Group Insurance Regulations, 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 (1-800-888-8267). 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, annuitants, 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 and employer contributions at any time. Health and welfare benefits are subject to legislative appropriation and are not accrued or vested benefit entitlements. If you belong to an exclusively represented bargaining unit, some of your benefits may differ from the ones described here. Contact your Human Resources Office 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 Director Mattie Williams and for faculty to Executive Director Sheila O'Rourke, both at this address: University of California Office of the President, 1111 Franklin Street, Oakland, CA 94607.

Comments or Questions?

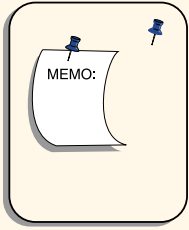
Write *New Dimensions* at:
University of California
Human Resources and Benefits
P.O. Box 24570, Oakland, CA 94623-1570

Association Contacts

Use this listing if you're interested in joining an association, or to inform your association of an address change.

	Emeriti	Retirees
Berkeley	UCB Retirement Center 510-642-5461	UCB Retirement Center 510-642-5461
Davis	John R. Whitaker 530-753-2381 jrwhitaker@ucdavis.edu	Arleen Kasmire 530-753-0898
Irvine	Sam McCulloch 949-650-5569	Emeriti/Retiree Office 949-824-6204 emeriti@uci.edu
LANL	N/A	Mary Mariner 505-672-1950 Chuck Mansfield 505-662-2115
LBNL	N/A	Bud Larsh 510-724-1202 almonlarsh2@juno.com
LLNL	N/A	Lawrence Livermore Employee Services Association 925-422-9402
Los Angeles	Emeriti/Retiree Relations Center 310-825-7456 emeriti@humnet.ucla.edu	Emeriti/Retiree Relations Center 310-825-7456
OP & Regents	N/A	Keith Sexton 925-376-5194
Riverside	Donald Munnecke 909-684-0922	Betty Morton 909-689-4381 TheMortons@aol.com
San Diego	Janice Stearns 858-534-0101	Candace Simonen 858-534-4724 retireelink@ucsd.edu
San Francisco	William F. Ganong, md 510-526-5680	Frances Larragueta 415-731-3109
Santa Barbara	Emeriti/Retiree Relations Center 805-893-2168 PL00LEH@ucsbvm.ucsb.edu	Emeriti/Retiree Relations Center 805-893-2168
Santa Cruz	Stanley M. Williamson 831-459-2032	Barbara Dileanis 831-426-7653

Note to associations: To update a listing, write to *New Dimensions*.



Bulletin Board

Bulletin Board is for UC retiree and emeriti association announcements. The information contained herein does not necessarily represent the opinions of UC Human Resources and Benefits. UC HR/Benefits reserves the right to edit, correct errors, and/or decline to publish information submitted to New Dimensions. To post an announcement, write to New Dimensions or e-mail janie.kirsch@ucop.edu. The deadline for submissions for the Summer issue is May 1.

UC San Diego Retirement Association

Our Spring Luncheon was a great success. The theme this year was nautical and many of our members came in “sailing attire”. Great thanks to the event chair Ruth Blais who was honored with this year’s “Outstanding Service” award.

In early March we put on an introductory class on using e-mail. Almost half of our members are using e-mail now and we want to encourage more to join in. UCSD Retirement Association members may subscribe to Internet access through UCSD. We forward selected e-mail fliers and notices from UCSD to our members as well as send e-mail announcements of opportunities and events that we hear about too late for our regular monthly newsletter.

Retirees from UCSD’s Medical Center will be gathering on Thursday, April 20, at the Bali Hai Restaurant for the twice a year Lunch Bunch get-together. Call Jeanne Reed at 858-689-1202 if you would like to come.

We will host the International Center Cafe a second time this spring on May 12. For this popular event we provide financial support as well as a crew of volunteers who will serve lunch to UCSD’s foreign students and researchers and their families. Our volunteer committee, chaired by Martin Rachmeler, is also busy coordinating volunteer hosts and hostesses for several campus events including

Sharecase 2000, the all-day fair for UCSD staff with demonstrations of new web-based financial, student information and purchasing processes.

May 27–29 our Association will be participating in a Conference on Retirement in Higher Education hosted by the San Diego State University Retirement Association. The goal of this conference is to share ideas for the development of retirement associations and centers in Universities and Colleges. Topics to be covered include: Communications—Newsletters, E-mail, Websites and More; Life-Long Learning Programs; Volunteer Programs; and Forming and Improving Retirement Associations. Information on how to register for the conference is available by calling the UCSD Retirement Association.

Mark your calendars for our summer events: Our Annual Dinner will be at the Reuben E. Lee on Saturday, June 17; Fred Chukes will be leading a tour of the Thornton Winery on July 20; Jan Robinson is chairing our Picnic on the Green on Saturday, August 26; and Rosemary Norling is chairing our Day at the Races on Sunday, September 3.

For more information or reservations for any of the above events or to receive a free copy of our Newsletter and a membership application call our office at 858-534-4724 or send an e-mail to retireelink@ucsd.edu. All UC retirees are welcome.

Bulletin Board

UC San Diego Emeriti Association

The UCSD Emeriti Association reports that a very active program is underway again this year. Approximately every six weeks during the academic year, a Speakers Program accompanies an association meeting. The March 23 meeting featured Emeriti Professor of History, Ramon Ruiz, speaking on “Mexico, Yesterday and Today, the Relevance of Mexican History.” The February issue of UCSD’s Retirement Association Newsletter included for the first time two pages of Emeriti Association news, representing a collaborative effort of the two UCSD retiree associations. Believing that the Internet offers a great opportunity for emeriti to communicate with each other and obtain campus news and

information, the UCSD Emeriti Association now has a website (emeriti.ucsd.edu) and it describes the association, lists its members, posts activities, programs, agendas and articles of interest. There is also a message board for interactive dialogue. Now even geographic relocation no longer means that ties with the University must cease.

Officers of the Association this year include:

Helen Ranney, M.D., President (former Chair of the Department of Medicine)

Marjorie Caserio, Vice President/President-Elect (former Vice Chancellor of Academic Affairs and Interim Chancellor)

University of California Retirees Transit the Panama Canal

The lights of warm, wonderful San Francisco danced on the bay as we eased under the beautiful Golden Gate Bridge. It was September 29, 1999, and 162 UC retirees and their guests were aboard the Crown Princess for a fifteen-day trans-canal adventure. The cruise was a joint effort of Rosemary Norling and her committee from UC San Diego, and the Council of University of California Retirement Associations.

The ports of call for this fifteen-day journey were Cabo San Lucas, Acapulco, Huatulco, Cartagena, Grand Cayman, and Cozumel with Fort Lauderdale our port of debarkation.

While at sea, the retirees and their guests were invited to participate in numerous activities. There was a lovely welcoming party to have the retirees get acquainted with one another. There were also lectures and many folks participated in a competitive shuffleboard tournament. The final evening was enjoyed with a farewell cocktail party.

The outstanding event of the cruise was the exciting, inspiring transit through the Panama Canal. The

ship had six inches to spare on either side as it slid through the Canal on its way from the Pacific to the Atlantic Ocean.

There were wonderful opportunities to shop for bargains and explore the lovely beaches in Acapulco. Some of the retirees had their picture taken with a “real pirate” at the fort in Cartagena. While in Cozumel, many of the group visited the ruins at Tulum, while others snorkeled in the crystal clear ocean water. Some of the best memories were the good times had at our fabulous evening dinners, enjoying the evening entertainment, followed by long strolls on the deck to check out the star-filled skies.

It was a joyful journey for the participants, renewing friendships, making new connections and enjoying each other’s stories of past and present involvement with the University.

A questionnaire distributed to voyagers at the end of the cruise resulted in comments suggesting that the cruise had been a “raving success!” and should become a repeat affair.

Bulletin Board

UC Riverside Retirees' Association

The year 2000 promises to be a special year for UCRRA. Chancellor Orbach has enhanced his support of our Association financially as well as providing administrative services through the office of Alumni & Constituent Relations. This will enable us to provide more activities as well as improve our communications with members. For details, see the March issue of our newsletter, *The Tower Talk*. His interest and assistance is sincerely appreciated.

If you have been thinking about joining UCRRA, now is the year to do it. Membership is \$15 per year, except the first year of your retirement, which is free. To join, send your name, address, telephone number, e-mail address and the month and day you were born (year of birth is not required)

to UCR Retirees' Association, P.O. Box 52635, Riverside, CA 92517. We look forward to sharing our activities with you.

The Investment Club has wrapped up a very good year and our Bridge Group continues to be a popular monthly activity. 1999 was a very good year for the Association and I want to thank all of the board members and committee chairs for their time and efforts.

For more information about the Association or to receive a free copy of the quarterly newsletter, *The Tower Talk*, write/call/or e-mail: Betty Morton, 4423 Clio Court, Riverside, CA 92503-2714, 909-689-4381, or TheMortons@aol.com.

PARRA Spring Luncheon

Friday, April 28, 2000

Our Spring Luncheon will be held at the Mira Vista Country Club in El Cerrito where parking is abundant and free.

We are very fortunate to have as our speaker: Dr. George Breslauer, distinguished Professor of Political Science at UCB and expert on Russia, speaking on "Russia in the Year 2000."

A no-host social hour will start at 11:30 a.m. Lunch will be served at noon. The cost is \$18 per person. Please make your check out to PARRA and return it along with the form below indicating your meal preference. **Please return the form no later than April 21, 2000.**

We hope to see you there!

Name _____

Name of Guest(s) _____

Yes, I will be attending. Enclosed is my check (for \$18 per person) made payable to PARRA.

Indicate number of meals desired next to selection below.

For lunch I would like Chicken Crepes (with salad) _____ or Cobb Salad (with soup) _____

signature

Return this form to: University of California HR/Benefits—Communications & Training,
300 Lakeside Drive, 5th Floor, Oakland, CA 94612

Bulletin Board

Panama Canal Cruise—Photo Memories

This marks the first event that so many UC retirees from so many locations have gotten together; they came from all over the United States.



UC San Diego Group



UC Davis Group



UC Santa Barbara Group



*Shuffleboard Tournament Winners
(left to right) Second Place Winners: Hugh Pates and
Rosemary Norling;
Winners: Ken Ekman and Mary Pates*



UC Berkeley Group

Bulletin Board



Lawrence Livermore National Laboratory Group



Los Alamos National Laboratory Group

UCSD Travel Interest Group

The Travel Interest Group has worked hard since the Panama cruise to find another interesting adventure, and details have just been finalized. The tour, entitled “The Grandeur of Sailing on the Danube,” will depart for Munich on May 16, 2001.

There will be an optional pre-sailing two-night package tour of Salzburg and an optional post-sailing two-night package tour of Prague including accommodations, sightseeing and transfers. We will cruise the Danube for seven nights on the four-star MV Danube Princess, which has a capacity for 200 passengers, cabin size 131 square feet, four decks, one seating for dining, and all the amenities of a small cruise ship. Ports of call on the Danube, where you will be able to explore the art, history and culture of Europe’s most celebrated cities, will be Passau, Melk, and Grein, Germany; Durnstein and Vienna, Austria; Budapest, Hungary; Esztergom and Bratislava, Slovakia. The rates per person are \$2,300

(\$1,450 cruise only) for the lower deck and \$2,600 (\$1,750 cruise only) for the upper deck. These rates include the cruise, pre- and post tour, three shore events in Budapest, Bratislava and Vienna, and all meals on board ship. Airfare is not included.

We are hoping to fill the ship with just our group. It is important, therefore, that you make your reservations as soon as possible to insure you will be able to take advantage of this terrific experience and enjoy the grandeur of this part of Europe aboard a luxurious floating hotel. For more details and a Peter Deilmann/EuropAmerica Cruises brochure, contact Pat Reimnitz, Village Travel, 1-800-345-3178 or 1-858-454-3178, e-mail patr@tcsan.com, or Rosemary Norling at 1-858-453-0908, e-mail rnorling@ucsd.edu.

We are looking forward to seeing old friends and making new ones. Remember, your family and friends are welcome to join us.



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Human Resources and Benefits
300 Lakeside Drive, 5th Floor
Oakland, CA 94612-3557

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New Dimensions

Benefits Newsletter for UC Annuitants
Volume 15 Number 1, Spring 2000

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