

## UC Retirement Savings Program: New services provider, Core Funds and other options

*The transition of account and record-keeping services for the UC Retirement Savings Program to Fidelity Investments Tax-Exempt Services Company (FITSCo) is complete. In addition, a host of new UC Core Funds and other investment options will be available for the Program.*

Retirees with accounts in the Program received a services transition guide and Retirement Savings Program investment options booklet in the mail in June.

### Notification and service guidelines coming

In late July, Retirement Savings Program participants will receive a notice from FITSCo announcing that the service transition is complete, and that FITSCo is available to assist with their account and transactional needs. The notice will include useful guidelines for accessing FITSCo phone and online systems and services.

### Contact FITSCo for service

With the transition of services to FITSCo, **Retirement Savings Program participants are reminded that all account transactions and inquiries should be directed to FITSCo rather than to the UC Customer Service Center.**

This does not apply to services for the UC Retirement Plan (UCRP), which provides pension and Capital Accumulation Provision (CAP) benefits. The UC Customer Service Center will continue to provide all UCRP services.

Service enhancements provided by FITSCo include daily valuation recordkeeping, expanded customer service hours, consolidated quarterly statements, and single account access to all plans.

### Core Funds and other investment options

Starting in July, Retirement Savings Program participants can direct their money to any of 18 UC Core Funds that are selected and monitored by the UC Office of the Treasurer. The three categories of funds—single, diversified options; primary asset class options; and specialized asset class options—are explained in the investment options booklet.

Non-Core Funds options, including Fidelity, Calvert, and a self-directed brokerage account, are also available. ➤

To contact FITSCo:  
Phone: 1-866-682-7787

Website:  
[netbenefits.fidelity.com](http://netbenefits.fidelity.com)

# Your 403(b) Plan beneficiary designations may change

Tax-Deferred 403(b) Plan beneficiary designations for participants who have Fidelity or Calvert accounts may change as a result of the Plan services transition to FITSCo in July.

Details are in the June and July mailings from FITSCo.

The table to the right summarizes the 403(b) Plan beneficiary designations that will be in effect after the transition period.

**DC Plan and 457(b) Plan beneficiary designations will not be affected by the transition.**

**Now might be a good time** to review all your UC beneficiary designations to make sure they are up to date. Go to [netbenefits.fidelity.com](http://netbenefits.fidelity.com) to review your Retirement

If you currently have a 403(b) Plan beneficiary designation on file for:	After the transition:
UC funds only	The beneficiary designation will be the same as before; no change.
UC funds and Fidelity and/or Calvert funds	The beneficiary designation will be the UC fund designation for all your 403(b) Plan accounts; any Fidelity and/or Calvert designation will be dropped.
Fidelity funds only	The beneficiary designation will be the same as before; no change.
Calvert funds only	Any Calvert designation will be dropped. You will need to designate beneficiaries.

Savings Program designations, and to [atyourservice.ucop.edu](http://atyourservice.ucop.edu) for UCRP and insurance plan designations. 📧

## New Medicare Part D for 2006

By now, many of you have heard about the new Medicare Part D program (available in January 2006) that will help those with Medicare pay for prescription drugs.

While it is important for you to read any Medicare communications that you receive, it is particularly important for you to read all UC communications for explanations about plan rules and requirements. UC-sponsored plans will have individual provisions, currently being explored, for Medicare Part D that may differ from non-UC information that you receive.

The September issue of this newsletter will provide more details about Medicare Part D. Please note that our UC Customer Service Center will not have information on this program until late September. 📧

## UC team to compete for LANL management

The UC Board of Regents has voted to pursue continued management and operations of the Los Alamos National Laboratory, which has a workforce of more than 8,500. UC's contract to manage LANL is currently scheduled to expire next May.

A UC and Bechtel-led team, which includes BWX Technologies, Inc. (BWXT), Washington Group International and a consortium of New Mexico higher education institutions, submitted its competitive proposal to the U.S. Department of Energy in July.

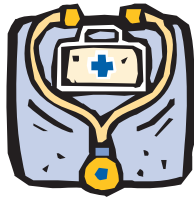
A detailed article about UC's entry into the competition is available online ([universityofcalifornia.edu/news/2005/may26a.html](http://universityofcalifornia.edu/news/2005/may26a.html)). 📧

## Medical plan focus: Health information around the clock

### Available to Blue Cross Plus and PPO plan members

Everyone has at one time or another wondered if they're doing the right thing or taking adequate precautions when it comes to basic health care.

You know it is not an emergency, but wish you had the information to make the right choices. Blue Cross of California's MedCall® telephone service



enables members to get professional guidance with a simple phone call.

MedCall is a **free** 24-hour, seven-day-a-week resource that connects you to a registered nurse or audio library of health topics. This is currently available to UC members enrolled in the Blue Cross PLUS and Blue Cross PPO plans. When you call one of their nurses, they guarantee your conversation is completely confidential. The nurse is there to give you knowledgeable answers to your health care questions, or to direct you to another health care professional.

You also have a MedCall Audio Library at your disposal. The library contains hundreds of audio tapes about health-related categories ranging from "Abdominal Problems," "Allergies," and "Back and Neck Pain" to "Healthy Living," "Senior

Health" and "Women's Health." When you access the library, your privacy is protected.

MedCall is not meant to replace your doctor or local emergency room for serious health problems, but it does allow you to investigate those day-to-day concerns by just picking up the phone—the number is on the back of your Blue Cross PLUS or PPO identification card. Please take advantage of this confidential, easy-to-use service and get the facts you need to make informed health care decisions.

*Note: MedCall is an optional service to be used in noncritical and nonemergency situations. It does not replace your doctor. MedCall is not a substitute for prompt medical attention when major symptoms occur. In an emergency, call 911.* 📞

## New prescription drug services for Health Net and PacifiCare

Effective July 1, 2005, UC employees, retirees, and their eligible dependents enrolled in Health Net, Health Net Seniority Plus, PacifiCare, and PacifiCare Secure Horizons can obtain mail order quantities (usually up to a 90-day supply) of approved maintenance medications at UC Medical Center pharmacies (UCI, UCLA, UCD and UCSD).

This service is already available to those in the Blue Cross PLUS, PPO, and High Option plans. Maintenance drugs are prescriptions taken continuously to manage chronic or long-term conditions where members respond positively to drug treatment, and dosage adjustments are no longer required or are made infrequently.

The prescriptions must be picked up at the UC Medical Center Pharmacy; this is "walk in" service which is not structured for individual mail-out or delivery. Questions and Answers for each of the participating

plans and participating pharmacies is available in the July online issue of the *Human Resources and Benefits Briefing*: ([atyourservice.ucop.edu/briefing](http://atyourservice.ucop.edu/briefing))

The mail order copayments will apply depending on the type of drug prescribed. For additional details about this service, contact Health Net, PacifiCare, or Blue Cross directly. 📞



# 2005 cost-of-living adjustment

Effective July 1, 2005, the automatic cost-of-living adjustment (COLA) for the University of California Retirement Plan (UCRP) (monthly retirement, UCRP Disability, Pre-Retirement and Survivor income) will be as follows:

The annual UCRP COLA is based on the average increase in the Consumer Price Index (CPI) for urban consumers in the metropolitan areas of San Francisco and Los Angeles from February 2004 to February 2005. This average CPI increase was 2.68 percent.

The UCRP COLA generally matches the increase in the CPI up to 2 percent plus 75 percent of the CPI increase in excess of 4 percent, to a maximum COLA of 6 percent. The Plan requires all persons to be in benefit status for at least one year

Retirement Date	COLA
On or before July 1, 2002	2.00%
July 2, 2002 to July 1, 2003	2.68%
July 2, 2003 to July 1, 2004	2.00%

before receiving a COLA. Thus, members with a retirement or disability date after July 1, 2004 are not eligible to receive a COLA this year.



## Minimum required distributions delayed

Because of the transition of account and recordkeeping services to FITSCo (see the article on page 1), the minimum required distribution (MRD) process for UC-sponsored retirement and savings plans will begin in the fall this year. The MRD affects UC retirees over age 70½. In 2006, the notification and distribution process will revert to its regular spring schedule. For questions about required distributions, contact FITSCo directly at 1-866-682-7787.



## Bulletin Board

*Bulletin Board is for UC retiree and emeriti association announcements and other articles of interest. 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, and/or decline to publish information submitted to New Dimensions. To send a suggested announcement, write to New Dimensions or email [steven.ong@ucop.edu](mailto:steven.ong@ucop.edu).*

## Splendors of the Nile

The UC Travel Interest Group is offering a 12-day trip to Cairo, the Pyramids, Memphis, Sakkara, Aswan, Valley of the Kings and Queens, and Luxor along with a deluxe 4-night Nile River Cruise. The travel group partners with Smithsonian Journeys.

The travel dates for this adventure are November 3 to 14, 2005. Rates are: Double \$3,824 per person; Single \$4,624; Triple \$3,794 per person; includes round trip air from San Diego, CA, hotel transfers, air taxes and fees. Additional Airport Gateways—San Francisco, CA at no additional cost; from Los Angeles, CA, deduct \$50 per person from the above rates.

For more information or to request a tour brochure, contact Collette Vacations, Special Account Desk, at (877) 584-7302, and refer to Group Reservation No. 122470. Brochures may also be obtained at your campus retirement association office. For general tour information, contact Rosemary Norling, Chair, Travel Interest Group, at [Rnorling@ucsd.edu](mailto:Rnorling@ucsd.edu) or (858) 453-0908.

## New Dimensions

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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 of Diversity and Employee Programs, University of California Office of the President, 300 Lakeside Drive, Oakland, CA 94612 and for faculty to Director of Academic Affirmative Action, 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  
Email: steven.ong@ucop.edu

## For Benefits questions:

UC Customer Service Center: 1-800-888-8267  
Website address: atyourservice.ucop.edu

## Retiree Association Contacts

Use this listing if you're interested in joining an association, or to inform your association of an address change. If you have questions about your UCRS retirement benefits, call the UC Customer Service Center at 1-800-888-8267.

	<b>Emeriti</b>	<b>Retirees</b>
Berkeley	UCB Retirement Center 510-642-5461	UCB Retirement Center 510-642-5461
Davis	Charles E. Hess 530-758-0671 cehess@ucdavis.edu	Charles Lacy 530-756-4372, calacy@ucdavis.edu
Irvine	Kivie Moldave 949-824-6204, emeriti@uci.edu	Emeriti/Retiree Office 949-824-6204
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	Karl Droese 925-376-0468, kdroese@comcast.com
Riverside	Dericksen Brinkerhoff 951-682-3293 dericksen.brinkerhoff@ucr.edu	Betty Morton 951-689-4381, TheMortons@aol.com
San Diego	Sandi Pierz 858-534-0101	Suzan Cioffi 858-534-4724, RetireeLink@ucsd.edu retirement.ucsd.edu
San Francisco	Dr. Dorothy Rice 415-476-2771	Frances Larragueta 415-731-3109
Santa Barbara	Maggie Popp Emeriti/Retiree Relations Center 805-893-2168 maggie.popp@hr.ucsb.edu	Maggie Popp Emeriti/Retiree Relations Center 805-893-2168 maggie.popp@hr.ucsb.edu
Santa Cruz	Stanley D. Stevens 831-475-9172 sstevens@library.ucsc.edu	Nancy Pascal 831-423-2422, njpascal@cruzio.com

Note to associations: To update a listing, write to Steven Ong at *New Dimensions* (email: steven.ong@ucop.edu).



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## Retiree Newsletter on Audio Cassette

**T**his newsletter is available on audio cassette tape for visually impaired and disabled retirees. If you are interested, call *New Dimensions* at 1-800-239-4002, extension 79836, and leave your name, address, and phone number. Please indicate that you want to receive *New Dimensions* on tape and future *New Dimensions* recordings will be sent to you. Please note that audio cassette tapes are generally mailed four weeks after each *New Dimensions* mailing.

