

# new dimensions



## Preparation makes it easier for your survivor to claim benefits

We're advised, especially as we get older, to "prepare for the inevitable."

Translation: Get things in order while you can, so that your loved ones are taken care of with as little burden as possible.

So, a nudge from UC: As you organize a file for your surviving loved ones with your will, health care directives and other documents, include information and "to-dos" related to your UC Retirement Plan (UCRP) benefits.

Depending on the length and timing of your career with UC, your family member(s) or survivor(s) may be eligible for monthly income (a percentage of your pension), medical and dental coverage, life insurance and the UCRP basic death benefit (\$7,500). It all depends on what you're signed up for and what your survivors are eligible to receive.

When the time comes, staff at the

UC Retirement Administration Service Center (RASC) will sort all of that out and support your survivor and beneficiaries throughout the process of claiming due benefits.

In the meantime, RASC staff offer the following tips:

- Make sure your benefits will go to whom you intend by keeping your beneficiary designations up to date. A death, divorce or new spouse or domestic partner may require a beneficiary change. You may check and manage this via your UCRAYS account. (See page 4).
- Retrieve, review and put in your file your retirement confirmation statement. It may have been many years since you've looked at this statement, which you received around the time you retired. It summarizes the options that you selected back then. The statements will include names of your contingent annuitant, if you elected one at retirement, or those who will receive your pension benefits and the monthly income (percentage of your current retirement income) that your survivor(s) will receive.
- Let those you've designated as beneficiaries know, so that they are aware of the process and of benefits they may expect to receive.
- Designate a point person to work with UC RASC. Someone other than a grieving spouse or partner may be better suited to handle this responsibility, since it does require some coordination with RASC to keep the process smooth and timely. Tasks may include sending the death certificate to RASC, collecting and returning other documents, and making sure certain forms — including those related to direct

## 2021 1099-R statement availability

It's tax season, and here's information about how retirees can safely access 2021 1099-R forms from UC:

- If you have requested to receive 1099-R forms electronically, they are available for viewing and downloading from your UC Retirement At Your Service (UCRAYS) account at [retirementatyour.service.ucop.edu](https://retirementatyour.service.ucop.edu). Go to "Benefit Payments & Taxes" and click "Tax Statements." For security reasons, you will be sent an email when you view your statement(s). You will also be required to respond to verify your identity by entering a one-time code that is sent to you via text to your cell phone number on file or to your personal email.
- Printed 1099-R forms were mailed by Jan. 31 to the address you have on file. UC sends you a printed form unless you request an electronic version.
- Though the deadline to request electronic delivery of your 2021 forms has passed, sign in to your UCRAYS account to request electronic delivery of next year's tax statements. Go to "Edit Profile" then to "Communications Preferences." Under "Tax Statements," choose "UCRAYS."
- Learn more about Getting Help with UCRAYS at [ucal.us/retireehelp](https://ucal.us/retireehelp).

Please note that UC does not send actual tax statements to employees or retirees by email or text. If you have requested an electronic statement, you must log in to UCRAYS to view and download it. If you receive an email or text that has an attachment for viewing your tax statement, it is a phishing scam designed to gain your private information. Do not open any attachments or click on any email links.

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## Are you Medicare-eligible, living outside of California and 64 years old or older?

UC sponsors a Medicare Coordinator Program, administered by Via Benefits, for Medicare-eligible retirees and family members living outside California. Here is important information about your medical coverage.

### New members

Eligibility for the Medicare Coordinator Program can be triggered by any of these events when all covered family members are 64-years-old or older and Medicare eligible:

- Retirement
- New home address outside California
- Medicare eligibility of all covered family members
- Covered family member turns 26 and is no longer eligible for UC health coverage, and all remaining family members are at 64 years old or older
- Retiree returning to UC medical coverage due to involuntary loss of other medical coverage or during UC's Open Enrollment

Once you meet the eligibility for the Medicare Coordinator Program, your information will be shared with Via Benefits. You will begin to receive regular communications from Via

Benefits as early as 12 months before your youngest family member turns 65. This is to prepare you for Medicare and to assist you with your enrollment through Via Benefits. You will remain enrolled in your current UC medical plan until your enrolled youngest family member turns 65, then all in your family must transition to the Via Benefits' medical plans. In some cases, Via Benefits may contact you as late as two months before the enrollment effective date.

### Existing members

The Medicare Annual Enrollment period (AEP), which runs from Oct. 15 to Dec. 7 every year, is your opportunity to change medical plans. Some members, however, may change their medical plans outside of this period.

Members who are enrolled in Medicare Advantage plans may change to another Medicare Advantage plan between Jan. 1 and Mar. 31. Members who are enrolled in Medicare Supplemental plans may change to another Medicare Supplemental plan any time during the year.

Contact Via Benefits at 1-855-359-7381, Monday through Friday, 5 a.m. to 6 p.m. (PT), for more information or to see if a plan change is right for you.

### Moving back to California?

First make sure Via Benefits and the UC Retirement Administration Service Center (RASC) have your new home address. The address must be a physical address as required by CMS (Centers for Medicare and Medicaid Services). Next, contact Via Benefits to verify whether your new address is in the service area of your current plan. If not, you'll need to enroll in a new plan through Via Benefits.

UC's next Open Enrollment period is your opportunity if you wish to return to a UC group medical plan. You must submit a UBEN 100 form and the appropriate Medicare Assignment forms during Open Enrollment to RASC to enroll.

For more information on the Medicare Coordinator Program, visit [ucal.us/medicarecoordinator](https://ucal.us/medicarecoordinator).

For more information on Medicare, FAQs about this program and plans offered through Via Benefits, visit: [my.viabenefits.com/uc](https://my.viabenefits.com/uc) and select "Shop for Plans" or call 855-359-7381, Monday through Friday, 5 a.m. to 6 p.m. (PT).

## Make sure personal information is up to date

The beginning of the year is a good time to review your personal information so that your UC retirement benefits go to whom and where they are intended and you receive important communications on time.

### For your UC Retirement Plan (pension) benefits:

- Ensure that your current physical address, email address and phone number are on file with UC.
- Make sure your direct deposit information is also up to date.
- Report promptly any deaths of covered family members, divorce or dissolution of domestic partnership and other changes that could affect your benefits and/or pension. Remember also to provide documents such as a death certificate, divorce paper, etc. (See story on page 1 regarding survivor benefits.)
- You can change your address with UC using your UC Retirement At Your Service (UCRAYS) online account. Visit [ucal.us/retireehelp](https://ucal.us/retireehelp) for instructions. You will be able to enter a home, mailing or temporary address.

Contact the Retirement Administration Service Center (RASC) for further assistance in one of the following ways:

- Secure message: Sign in to your UCRAYS account and select "Messages"
- Phone: 1-800-888-8267, Monday-Friday, 8:30 a.m. to 4:30 p.m. (PT)
- Fax: 1-800-792-5178
- Mail: UC Retirement Administration Service Center, P.O. Box 24570, Oakland, CA 94623-1570

### For your Retirement Savings Program accounts (403(b), 457(b), DC Plans):

- Log in at [netbenefits.com](https://netbenefits.com) and click on "Profile."
- You can review and edit personal and contact information, choose how you would like to receive important information, and make sure your designated beneficiary(ies) information is current and accurate. Please note that a telephone number is required for multi-factor authentication, an added level of account security enabled on [netbenefits.com](https://netbenefits.com).

## 2022 retirement benefit payment schedule

Payment month	Direct deposit date
January	2/1/2022
February	3/1/2022
March	4/1/2022
April	4/29/2022
May	6/1/2022
June	7/1/2022
July	8/1/2022
August	9/1/2022
September	9/30/2022
October	11/1/2022
November	12/1/2022
December	1/3/2023



## Telling the story



**Ben Tucker**  
Manager, Early Outreach Programs, UCOP

I joined the Berkeley campus in May 1980 as an outreach officer in the

Office of Relations With Schools. I left Berkeley in 1996 to take the position of Manager of Early and Immediate Outreach Programs at the Office of The President.

When I retired in 2003, a friend suggested I take classes at StageBridge, a performing arts company for seniors in Oakland. After taking singing, acting and storytelling classes, I focused on storytelling.

In 2015, I published my memoir, *A Good Run*, which captures the coming-of-age narrative of the Black experience from the Great Migration to the Civil Rights Movement. During my book talks, I found myself falling in love with storytelling.

I currently give book talks and storytelling workshops at libraries, museums, schools, senior centers, churches and community-based organizations. In the process, I have reinvented myself and perform under the stage name Brother Ben. In addition to being a dedicated storyteller, I am a world traveler and avid hiker. Whenever and wherever I travel, I look for opportunities to swap stories with the locals and hike the trails in the surrounding areas.

Life is very good when one finds a passion to pursue in retirement.

## Tribute to father, fine art



**Tonia Shimin**  
Professor Emerita, Department of Theater and Dance, UCSB

During my career as a dancer, teacher, choreographer and dance filmmaker, first in New York

and then for 27 years at UCSB, I have treasured a rich experience in dance and a love for all of the arts. Being part of this world came naturally as both of my parents were artists.

Shortly after my father's death, I came upon a treasure trove of transparencies of his fine art paintings, and a dream of making a book emerged. While his work in the field of children's books and Hollywood posters was known — he painted the original poster for *Gone With the Wind* — his fine art was less so and the goal of keeping this art from being lost became palpably prescient.

Thus began the journey of creating, for the first time, a record of and tribute to the work of my father. It took 30 years from inception to completion. Upon retiring, I was finally able to begin the long and daunting process of trying to pull this off. With the help of many people, the book *The Art of Symeon Shimin* became a reality. It is now my hope to get the book into as many libraries as possible.

I remember the many times I walked down the streets of New York with my father holding his hand as a child, and later as an adult, hearing the burning words, "I must get back to painting." I did not know then the gift he was leaving us. I am thrilled to share this work with the world.

### Share Your Stories

Doing something interesting in your retirement or at your UC Retirement Center? Tell your story in New Dimensions. Email us at [NewDimensions-L@ucop.edu](mailto:NewDimensions-L@ucop.edu).

### UC's retiree and emeriti associations and UC Retirement Centers use online communications to interact with retirees and emeriti about services and programs.

Go to [ucnet.universityofcalifornia.edu/retirees/associations.html](http://ucnet.universityofcalifornia.edu/retirees/associations.html) for a list of emeriti and retiree association and Retirement Center contacts. If you have moved away from your home campus, you are welcome to affiliate with the association or center near where you live.

### New Dimensions

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### Comments/Questions/Share Your Story

#### Write New Dimensions at:

Internal Communications  
University of California, Office of the President  
1111 Franklin Street, Oakland, CA 94607

#### For benefits questions:

##### RASC:

800-888-8267 (8:30 a.m. – 4:30 p.m., PT)

##### UCRAYS:

[retirementatyourservice.ucop.edu](http://retirementatyourservice.ucop.edu)

##### UCnet:

[ucnet.universityofcalifornia.edu/retirees](http://ucnet.universityofcalifornia.edu/retirees)

#### Want to go green?

Consider signing up for the electronic version of *New Dimensions*. Go to [retirementatyourservice.ucop.edu](http://retirementatyourservice.ucop.edu), select "Edit Profile," click "Communication Preferences," under "Communication Type," go to "Newsletters and other General Information" and select "Email."

## travel opportunities

### Explore other countries with fellow retirees

UC Retirees Travel offers wonderful opportunities to explore the world with retired staff and faculty from all UC locations. As of press time, space is available on the following trips, many of which feature optional pre- or post-trip extensions:

#### 2022 Trips

- Baltic Capitals & St. Petersburg, June 6-21
- Islands of New England, Aug. 26-Sept. 2
- Canadian Rockies by Train, Sept. 5-13
- Cuba Discovery, Oct. 17-22
- Christmas on the Danube, Dec. 2-10

#### 2023 Trips

- Spectacular South Africa, Feb. 2-15
- Japan's Cultural Treasures, Mar. 27-April 10
- Untamed Iceland, Sept. 20-Oct. 2

UC Retirees Travel considers the health and safety of travelers to be a high priority. All

travelers are required to be fully vaccinated against COVID-19 and all recommended safety precautions will be taken while traveling.

UC Retirees Travel is entirely facilitated by volunteers. Sue Barnes, a UCLA retiree, coordinates the program and escorts trips. Dolores Dyer, a retiree from UCLA, is assistant coordinator as well as a trip escort. Three other retirees volunteer as trip escorts: Sandra Norberg, a UCSF retiree, Vickie Leow, also a retiree from UCSF, and Frank Trueba, a retiree from UC Santa Cruz.

By participating in UC Retirees Travel, you help to support to the Council of UC Retirees Associations (CUCRA). CUCRA is comprised of volunteer representatives from each of the UC retiree associations, who meet with UC Office of the President representatives twice per year and advocate for retiree benefits and services.

For more information, visit the UC Retirees Travel website at [cucra.ucsd.edu/travel](http://cucra.ucsd.edu/travel) or email [UCRetireesTravel@gmail.com](mailto:UCRetireesTravel@gmail.com).

## Survivor benefits continued from page 1

deposits, rollovers and survivor-to-survivor benefits — are accurately dated and notarized.

- Put in your “survivor file” any paperwork you can gather now, including birth certificates for your spouse and/or children or beneficiaries, marriage or partnership certificates, evidence of name changes, and other documents.
- If your Trust is the beneficiary, your successor trustee should have the trust and all amendments prepared to send in when asked. If your Estate is the beneficiary, the executor of the estate should be prepared to send in the court documentation that indicates who the executor is.

### When it's time, here are actions a survivor or designated coordinator should take:

- Call RASC, 800-888-8267. During that first call, provide the following information about the deceased: Date of birth, date of death, Social Security number, date of marriage or state registration of domestic partnership, if

applicable. That contact will trigger the survivor benefits process. Usually within six weeks, the survivor(s) or anyone eligible for a benefit will receive a letter and packet explaining the benefits that may be payable and outlining the requirements for any forms and documents UC needs. It will also include timelines or estimates on when payments will begin.

- Notify Fidelity Retirement Services (866-682-7787) of the death and ask about plan balances, if any, in the UC Retirement Savings Program (403(b), 457(b), DC Plans).
- Another source for survivor benefits is Social Security. Contact your local Social Security office or go to [ssa.gov](http://ssa.gov) or call 800-772-1213. Also, contact other retirement systems to which the member belonged.

### How RASC will support survivors

RASC representatives and leadership take their responsibility to survivors very seriously, so we are enhancing the “survivor intake” process,

including adding this spring a dedicated phoneline and team to support survivors and beneficiaries as soon as they contact RASC.

In the meantime, RASC is implementing a new tool which makes it easier for the RASC survivor team to communicate with survivors and beneficiaries, personalize the process, and keep the flow of information and forms submission moving smoothly.

RASC leadership extends sincere appreciation to Todd Wipke, a UC Santa Cruz Emeritus Professor and active member of the Council of UC Emeriti Associations. He participated with RASC's survivor workgroup, and developed and donated this powerful tool, called “Benet,” as a gift to RASC and the community of UC survivors.

*For more details on survivor benefits, see [ucnet.universityofcalifornia.edu](http://ucnet.universityofcalifornia.edu) and the version of *Your Guide to Survivor and Beneficiary Benefits* that applies to your situation.*



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## Are you moving?

To continue receiving *New Dimensions*, be sure to notify UC of your new address online: [retirementatyour.service.ucop.edu](http://retirementatyour.service.ucop.edu) or by submitting a *UC Benefits Address Change Notice*, available online at [ucnet.universityofcalifornia.edu](http://ucnet.universityofcalifornia.edu) or from the Retirement Administration Service Center at 800-888-8267.



2/22 74M

## Are you transitioning to Medicare in 2022? Learn about your options

There's a lot to think about when you're ready to transition to Medicare. These informational sessions, designed for members of UC non-Medicare plans, are a great way to prepare.

### CORE, UC Care and UC Health Savings Plan (administered by Anthem Blue Cross) members

Watch a prerecorded presentation on your options when you transition to Medicare: [www.ucppoplans.com/ucc/transitioning-to-medicare](http://www.ucppoplans.com/ucc/transitioning-to-medicare)

### Kaiser HMO members

Register for a webinar and Q&A session to learn more about Kaiser HMO's partner plan, Kaiser Senior Advantage: [webinars.on24.com/KPMedicare/UC](http://webinars.on24.com/KPMedicare/UC)

### UC Blue & Gold HMO and UC Health Savings Plan members

Learn about UC Medicare Choice, a UnitedHealthcare® Group Medicare Advantage (PPO) plan, including plan benefits, services and programs; Medicare basics and UC eligibility and enrollment. UC Medicare Choice is the partner plan to UC Blue & Gold HMO and is an option for retirees who are enrolled UC Health Savings Plan.

You may attend an educational meeting online or by phone. Meetings are scheduled every month, and no pre-registration is required. Visit [www.uhcretiree.com/uc](http://www.uhcretiree.com/uc) and select “Transitioning to Medicare” for a schedule and more information.



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