

## **NEW UCRP PROVISIONS ONE TIME SERVICE CREDIT ALLOCATION**

- 1. One of the criteria to be eligible for the One-time Service Credit Allocation is that the employee must be an Eligible Employee with an active University appointment on January 1, 2001. Are people who are on leaves without pay on January 1, 2001 considered to be in active University appointments? If yes, will people who were on leaves without pay during January 2001 be captured in the AUTOMATIC allocation? (4/13/2001)**

Employees who meet the criteria, but are on leaves without pay on January 1, 2001 will be eligible for participation in the One-time Service Credit Allocation program, however, since they are not on pay status on January 1, they will not be picked up in the automatic allocation process. To receive an allocation, these employees will have to self-identify. The process for self-identification is currently being developed.

- 2. Are we going to allow employees to purchase UCRP service credit for periods of casual employment other than those periods identified during the automatic one-time UCRP service credit allocation? For instance, a person could work in a career position, separate from UC, and then return later in a casual position. They eventually get into a UCRP eligible position again. Their entry date goes back to the original hire date, so it looks like they won't get picked up in the automatic allocation process. Will they be able to appeal? Will we allow them to pay for the casual time (if pre-1990) and would they be eligible to get it without cost for post-1990? (4/13/2001)**

It is true that the automatic service credit allocation process will not be able to identify the employee described in the question. This employee has prior casual service, but will have to self-identify to receive the allocation. If the automatic allocation amount is less than the eligible prior casual service, the employee may receive the additional casual time. For example, if the employee had three years of casual service prior to November 1990, the two years' worth of service credit allocation would be applied first, leaving a one-year period available for individual purchase, if the employee chooses to do so. In the same scenario, if the three years of service were in the post-1990 period, the allocation would be augmented by the additional year of service, resulting in three years of service credit allocated at no cost to the employee.

- 3. Is there going to be a look back beyond 1/1/98? The Lab has many employees that were full time casuals for several years prior to 1998. (3/27/2001)**

There are no plans for an Employment Look Back program to consider time worked prior to 1/1/98.

Under the One-time UCRP Service Credit Allocation program, a UCRP member may be eligible to receive an allocation of UCRP service credit in recognition of time worked in a temporary position prior to January 1, 2001. There is no time limit under this one-time

allocation program as long as earnings records and/or other supporting personnel documentation are available to substantiate the employee's work history.

- 4. How will Benefits Offices be able to tell who received the automatic one-time UCRP service credit allocation? Will the service appear in the UCRS membership system? (3/27/2001)**

The automatic one-time UCRP service credit allocation will appear in the UCRS Membership System. For those of you familiar with the Membership System, the service credit will appear as a line on the F-screen, identified by a non-location location code, yet to be determined. The allocation will probably be loaded in the system in May 2001.

- 5. How should Payroll and other offices respond at this time to requests for earnings and other records which are being made by employees who think they may need them to receive service credit for periods of casual employment prior to 1/1/01? (11/22/2000)**

Employees who are actively employed on January 1, 2001, may be eligible, at a future date, for a fixed amount of Service Credit. The fixed amount will be determined by actuarial analysis. Eligible employees will not need to provide earnings or personnel records in order to receive this fixed amount of Service Credit.

Employees should wait for further details about the program and the allocation amount. It is not necessary for employees to request copies of records from local payroll offices at this time. HR/Benefits expects to provide detailed information about the allocation and the appeals process during the first half of 2001.

- 6. Who is eligible for the added service credit for retirement? Specifically, if a current career employee was appointed to a casual staff appointment prior to 11/90, will he/she be eligible for the added service credit? (10/27/2000)**

The retirement look back proposal applies to two groups of employees: current casual employees, and active UCRP members with prior casual employment (includes any employment periods prior to 1-1-2001) who are actively employed on January 1, 2001.

- 7. Will the Casual/Limited Appointment employee who has an active appointment on January 1, 2001, but is converted to Career before reaching 1,000 hours be eligible for the blanket grant of UCRP Service Credit? (12/20/2000)**

For an employee who is in a casual/limited appointment on January 1, 2001, but gets changed over to a career appointment in February 2001 before reaching the 1,000 hours, assuming the employee has prior casual service, he or she would be eligible for the UCRP blanket grant of Service Credit.

**8. How far back will the University go in reviewing prior service credit? Who will pay for this prior service? (12/11/2000)**

The Retirement Look Back provides for the UCRP Active Member to accept a pre-determined allocation of UCRP Service Credit that is based on an actuarial determination of a "blanket" service credit award that should satisfy the service credit adjustment for a majority of Plan Members with prior casual UC employment. If the Member chooses to appeal and not accept the blanket service credit award, the Member will be required to submit the appropriate documentation and request a review of his or her records. No cost will be attached to post-November 1, 1990 service. Any pre-November 1, 1990 service may be voluntarily purchased by the Member at the employee cost applicable to that period.

**9. Does this right to review (appeal the service credit allocation) apply to determining retirement service credit? (12/11/2000)**

Yes. The University of California Retirement Plan (UCRP) will allocate a systems-derived amount of service credit to eligible individuals who have prior casual service and who are employed by the University on January 1, 2001. These individuals will have the right to appeal this service credit amount.

**10. Regarding retroactivity, will separated employees be eligible for retroactive review of retirement service credit? (12/11/2000)**

The service credit allocation and/or opportunity to purchase prior service for casual service will be available only to employees on pay status on January 1, 2001 and who are or become University of California Retirement Plan Active Members, within a specified time period. Separated employees will not be eligible for a review of their records.