

new dimensions



New beginnings for the UC Retirement Administration Service Center

The UC Retirement Administration Service Center (RASC) took another big step forward in the implementation of its strategic operating model with the launch of Retirement Counseling and Advisory Services in January 2024. Beginning Jan. 2, 2024, a dedicated team of accredited financial professionals are available for personalized retirement counseling by appointment, helping members of the UC Retirement Plan (UCRP) make informed retirement decisions. RASC's new online

portal, rasc.universityofcalifornia.edu, includes a convenient self-scheduling option along with easy access to retirement resources. The Retirement Counseling and Advisory Services launch follows the introduction of RASC insurance liaisons, who work directly with UC's health plan providers and vendors to address retirees' concerns. "I'm so proud of the teams that have joined RASC to guide and support members of the UC community," said Bernadette Y.

Green, executive director of the RASC. "Through an innovative — and award-winning — recruitment process, we have strengthened the RASC with qualified and caring individuals who are committed to our mission of service." (See accompanying story, "UCOP, RASC honored by California Higher Education Collaborative".) To learn more about Retirement Counseling and Advisory Services through the RASC, check out the video at rasc.universityofcalifornia.edu/about-rasc

UCOP, RASC honored by California Higher Education Collaborative

The UC Retirement Administration Service Center quickly transformed by constructing and recruiting teams to better serve the university's retirees. This effort was highly noticed statewide. Last fall, RASC received a "Focus on Efficiency Award" from the California Higher Education Collaborative (CHEC), which recognizes programs at California's community colleges, California State University, and University of California campuses that demonstrate innovative practices to improve operational performance, services, and outcomes for California Higher Education. "With our sights set on the transformative operational strategy, we knew we had to be creative," said Bernadette Y. Green, RASC executive director. "Ineffective recruiting is both time-consuming and expensive for the organization. The rapid recruitment team sourced and delivered talented, motivated individuals who are adding immediate value to RASC."

Overcoming challenges

RASC, located at the University of California's Office of the President in Oakland, began the journey to implement a new operating model in December 2020. As part of the strategic implementation, RASC needed to hire 55 people with specific skills and competencies to build six new teams and strengthen existing units. And they needed to hire them quickly.

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Enroll in Medicare when eligible, avoid penalties

Emeriti and retiree leaders engage UC on benefits

Share your stories

Enroll in Medicare when you’re eligible to avoid penalties and protect your coverage

Medicare partially reduces the cost of retiree health plans, allowing UC to continue to fund retiree health benefits and keep premiums low. If you are a retiree who is eligible for *premium-free* Part A and you don’t enroll in Part A and B by your 65th birthday, you could be charged penalties by UC and lifelong penalties by Medicare, and even lose your UC-sponsored medical coverage.

If you are required to pay a premium for Part A as a retiree, you are not required to enroll in Medicare Parts A and B. However, UC does require that you send in a denial letter from Social Security to keep your current coverage.

Starting May 1, 2024, UC will begin charging a monthly penalty of \$419.60, known as the Medicare offset premium, to individuals who are covered by UC retiree health benefits who may be eligible for Medicare but have not enrolled in Medicare and a

UC Medicare plan, or submitted a denial letter from Social Security to the UC Retirement Administration Service Center (RASC). This includes retirees, survivors, and disabled members, along with the family members included in their UC coverage.

When and how to enroll

Generally, you’re first eligible for Medicare Part A and Part B starting 3 months before you turn 65. Once you enroll in and assign your Medicare, you’ll move to a UC-sponsored Medicare plan. Enrolling in Medicare is a multi-step process, so it’s a good idea to start early. To learn more, see the Medicare Fact Sheet and What to do if you’re enrolling in Medicare on UCnet (at ucal.us/medicare).

If you are a retiree whose home address is outside of California (but in the U.S.), the UC Medicare

Plan enrollment process is different. See article below.

The offset premium

The Medicare offset premium is a monthly administrative penalty charged to each person who is eligible for premium-free Medicare Part A but is **not** enrolled in a UC-sponsored Medicare plan. This offset premium is in addition to your monthly medical premium and is intended to partially offset the cost to UC when retirees don’t apply for the Medicare benefits they’re entitled to receive.

Effective May 1, 2024, individuals who are not in compliance with UC’s policies (by enrolling in Medicare when eligible or documenting their Medicare denial) will be charged the Medicare offset premium monthly for three months. On the fourth month, UC medical coverage will be terminated for

those who have not taken action. If the covered UC retiree is not in compliance, their family members will lose UC coverage as well. If a covered family member is the only individual not in compliance, only that family member will lose coverage.

RASC is here to help

Through April, RASC will host weekly Q&A sessions on Tuesdays, from 12-1 p.m. (PST), and monthly educational webinars **on the fourth Thursday of every month, from 10-11:30 a.m. (PST).**

- Register for a weekly Q&A session at: <https://bit.ly/RASCWeeklyMedicare>
- Register for a monthly webinar here: <https://bit.ly/RASCMedicareMonthly>

More updates, and recorded sessions, will be shared in the RASC portal, rasc.universityofcalifornia.edu

For retirees and covered family members, living outside California and turning 64 or older this year

UC sponsors the Medicare Coordinator Program (MCP) for retirees and family members who meet certain criteria. The program is administered by Via Benefits. Visit ucnet.universityofcalifornia.edu or my.viabenefits.com/uc for more information.

Newly eligible members

Eligibility for the MCP is triggered by one of the life events below when all covered family members meet these criteria: Medicare eligible, 65 years old or older and living outside of California.

- a. All covered family members 65 years old or older and Medicare eligible
- b. Retirement
- c. New home address outside CA
- d. Covered dependent turns 26 and is no longer eligible for UC health coverage, and all remaining family members are 65 years old or older
- e. Retiree returning to UC medical coverage due to involuntary loss of other medical coverage

Your data will be provided to Via Benefits when you meet the eligibility for the MCP. You will begin to receive regular communications and/or phone call outreach from Via Benefits as early as 12 months before your youngest covered

family member turns 65, or as late as two months to your effective date during your enrollment period due to life events, b to e. Members with these life events should submit a UBEN 100 form to the Retirement Administration Service Center (RASC) to begin the process for the MCP.

Via Benefits will prepare you for Medicare enrollment and your enrollment through the MCP. You will remain enrolled in your current UC medical plan during your MCP enrollment period while your enrollment with Via Benefits completes, then your UC coverage will terminate thereafter.

Existing members

The Medicare Annual Enrollment Period (AEP), which runs from Oct. 15 to Dec. 7 every year, is your opportunity to make medical plan changes with Via Benefits.

Some members, however, may change their medical plans outside of this period. Members who enrolled in new 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 at any time during the year, however, they

may be subjected to underwriting. Contact Via Benefits at 1-855-359-7381, Monday through Friday, 5 a.m. to 4 p.m. (PT) or visit thegrooveviabenefits.com or my.viabenefits.com/uc for more information.

Moving back to California?

First, make sure Via Benefits and RASC have your new home address. The address must be a physical address as required by the 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 that services your area directly with Via Benefits to retain your HRA eligibility. Enrolling with your insurance company will terminate your HRA eligibility. If you wish to return to UC group plans, UC’s next Open Enrollment period is your opportunity.

For more information on the MCP, visit ucal.us/medicarecoordinator.

For more information on Medicare, FAQs about this program and plans offered through Via Benefits, visit: my.viabenefits.com/uc and select “Shop for Plans” or call 855-359-7381, Monday through Friday, 5 a.m. to 4 p.m. (PT).

Updated form for Kaiser Senior Advantage enrollment

The Medicare Advantage Universal Enrollment/Election Form for Kaiser Senior Advantage (the “UBEN 127” form), which is completed by members wishing to enroll in the Kaiser Permanente Medicare plan, has been updated.

The updates to the UBEN 127 include layout changes for race selections and revisions to the agreement and arbitration language.

The old version will be accepted by Kaiser Permanente through February 29, 2024. Thereafter, members must submit the new UBEN 127, starting March 1, 2024.

Kaiser Permanente will reject outdated forms received from UC (or from members) after February 29, 2024, regardless of the UC date shown in the timestamp.

Please go to the “Forms” page at UCnet to access the updated UBEN 127: ucnet.universityofcalifornia.edu/forms/number.html



UC Regent Jose M. Hernandez, a former astronaut, gave a presentation at the fall CUCEA meeting.

Emeriti and retiree leaders gear up for greater engagement on UC benefits topics

The chairs of UC emeriti and retiree associations look forward this year to increased and continuous dialog with UC leadership as they together tackle key benefits issues.

The newly established UC Emeriti/Retiree Advisory Committee will meet every other month with university officials to engage with and provide assessment to university officials regarding emeriti and retiree benefits, review the suite of medical plans offered, and assist with communication and outreach to the retirees.

Cheryl Lloyd, vice president, Systemwide Human Resources, reported on the new committee at the fall conference of the Council of UC Emeriti Associations (CUCEA) and Council of UC Retiree Associations (CUCRA).

In addition to Lloyd, members of the committee include: Jo-Anne Boorkman, CUCEA chair, UC Davis emerita; John Meyer, CUCRA chair, UC Davis retiree; Jay Henderson, associate vice president of Total Rewards, Systemwide Human Resources; Chuck Haines, vice chancellor-chief financial officer, UC Santa Barbara; Joel Dimsdale, CUCEA chair elect, UC San Diego emeritus; Dan Hare, appointed by CUCEA, UC Riverside emeritus; Eric Vermillion CUCEA/CUCRA Joint Benefits Committee member, UCSF retiree.

“The Office of the President has been undertaking many efforts to improve services to retirees in recent years,” said CUCRA chair John Meyer. “We’re hopeful the establishment of this advisory committee is another step to routinize how we can provide timely feedback

and highlight what is working and what requires more attention.

“Retirees and emeriti continue to share their time, talent and treasure with UC and it is important they are served in a way that maintains their fondness for their campus or national lab,” said Meyer.

Jo-Anne Boorkman, CUCEA chair, and Meyer noted possible issues likely to be discussed this year: support for out-of-state retirees, review of Delta Dental’s availability in all regions, monitoring the UC Retirement Administration Service Center’s (RASC) new operating model; and treatment of emeriti who return to active service.

Fall meeting

For the first time in several years, leadership from campus and National Laboratory emeriti and retiree associations were able to meet in person at the fall conference, Oct. 25 and 26. Emerging from the pandemic, the UC Davis Emeriti Association, Retiree Association and Retiree Center hosted the fall CUCEA and CUCRA joint conference, which was a hybrid format allowing in-person attendance as well as Zoom connections for those unable to travel.

More than 40 emeriti, retirees and UC Retiree Center staff attended the meeting in person, while an equal number attended via Zoom.

Highlights included:

A presentation by Doug Haynes, UC vice provost for Academic Planning and Programs,

who briefed the group on the UC academic landscape being planned by UC Provost Katherine Newman.

UC Vice President for Human Resources Cheryl Lloyd and Retirement Administration Service Center (RASC) Director Bernadette Green brought everyone up to date on the new Retirement Counseling and Advisory Services (see story on page 1).

At the CUCEA individual meeting, Jay Henderson, associate vice president for Total Rewards, shared plans for a Total Remuneration Study for all UC employees that will be conducted in 2024. Representatives from CUCEA and CUCRA have been nominated to participate in the early planning of this project.

Also at the CUCEA meeting, UC Regent Jose M. Hernandez, a former astronaut, whose life story was recently depicted in the movie “A Million Miles Away,” gave a talk. His presentation is available under the Meetings tab on the CUCEA website, www.cucea.org/meetings.html. Other meeting highlights are also available there.

The CUCRA individual meeting included a conversation with Marco Merz, UC’s Managing Director of Defined Contribution Investment Products who, with his colleagues, addressed concerns regarding the lack of alternatives for guaranteed returns.

The next CUCRA/CUCEA conference will be held April 24-25, hosted on Zoom by UC San Diego.



Left photo: Jung Sook, a UCLA retiree, and her husband, In Hae Choi, enjoy a traditional jaunting buggy ride through Killarney National Park in Ireland. Right photo: Adele Dow, a UCSF retiree, Patricia Arciniega, guest of UCSB retiree Stephanie Coghlan, and David Barnes, guest of UCLA retiree Sue Barnes, prepare a traditional luncheon in Chile.

Travel tips for 2024 and 2025

After two-plus years of pandemic-related disruptions, travel is surging, with a strong demand from UC retirees to rediscover the world.

UC Retirees Travel, which offers group tours for UC’s retired faculty and staff, has these tips for those interested in traveling this year or next.

Register early

Whether you are booking with UC Retirees Travel or another operator, it is recommended that you book at least a year in advance whenever possible, as many trips sell out very quickly. Additionally, UC Retirees Travel’s partner tour operators hold space for UC retirees until about seven months prior to departure. At that point, unsold spaces are released to the public and often sell out immediately.

Check your passports

Make sure your passport is good for at least six months after your trip departure date and has at least two blank pages for stamps. Renewing your passport can take up to six months and even with expedited renewal, the timeline can be seven to nine weeks. travel.state.gov/content/travel/en/passports.html

Consider getting Global Entry

Frequent international travelers will benefit from getting a Global Entry card, which can get you through U.S. Customs in minutes instead of possibly hours. The card, which is good for five years, requires a background check, an in-person interview at selected airports, and a nonrefundable application fee of \$100. www.cbp.gov/travel/trusted-traveler-programs/global-entry

Watch for the new European ETIAS “Visa” Requirement

This is more accurately a visa-waiver program for 30 EU countries. This program was originally scheduled to begin in 2024, but France convinced the EU to delay the requirement until after the 2024 Olympics in Paris. This new requirement will now begin in mid-2025. travel-europe.europa.eu/etias_en

Several UC Retirees Travel trips for 2025 are now open for registration, and some 2024 trips still have space available. Visit cucra.ucsd.edu/travel to see details for 2024 trips to Japan, Iceland, Scotland, Quebec/ Montreal, and more and for 2025 trips to the Galapagos, Costa Rica, Finland, Italy, Spain/ Portugal, and Africa, as well as a Danube River cruise.

2024 retirement benefit direct deposit dates

The following chart lists the mailing dates of direct deposit statements and checks, and the direct deposit posting dates for UCRP monthly retirement, survivor and disability benefit payments.

PAYMENT MONTH	DIRECT DEPOSIT DATE	PAYMENT MONTH	DIRECT DEPOSIT DATE
January	2/1/2024	July	8/1/2024
February	3/1/2024	August	8/30/2024
March	4/1/2024	September	10/1/2024
April	5/1/2024	October	11/1/2024
May	5/31/2024	November	11/29/2024
June	7/1/2024	December	1/2/2025

From management to song



Robert Stefan Spich, PhD
Professor, UCLA Anderson
School of Management

While still teaching at UCLA, from where I retired in 2015, I pursued my interests in music via choral singing, jazz piano and guitar, not to mention season tickets to the Los Angeles Philharmonic and an occasional opera.

Since I threatened to write a symphony one day, last year I decided to finally make the move and set up a small music studio. One thing led to another, and I soon found myself writing songs instead of poems (which I've done for the last 30 years). A fortuitous meeting with a young indie music producer led to the release of my first songs on Spotify, where I perform my own songs as Robert Stefans.

Last fall, I released my first album of 12 songs, *Eclectic Menagerie*, with some very nice reviews praising the songs as an Americana songfest.

My goal in this venture is not to become a senior rock star! Since so much of contemporary music is not memorable, nor singable, I write songs that have universal themes and tunes that people can remember and hum and sing whenever.

As most of you know, music is a fundamental human need, if not a constitutional right! It helped all of us get through Covid and no doubt will get us through the election of 2024.

Learning her father's WW II story



Maureen Buick, RN, MS
Director of Nursing Education and Nursing Quality
Improvement, UCSF Medical Center

I retired in 2014 after a nursing career that spanned more than 40 years, including positions in adult critical care, neonatal intensive care and administrative nursing. It was a gratifying career, and I am thankful I retired at a high point. I enjoyed my job but was healthy enough to participate in all that retirement had to offer—including the time to slow down and reflect.

After I retired, my mother needed additional care in an assisted living facility, and our family looked to the Veterans Administration (VA) for help paying for her increasing health care costs. My father was a prisoner of war during World War II, and she qualified for financial assistance. While applying for a VA loan, I was asked questions about my father's WW II experience—questions I could not answer.

Determined to find these answers long after my father had passed away led me to an interest in WW II history and writing my book, *Finding Bomb Boogie: A Daughter's Search to Rediscover her Father—the World War II Bomber Boy, Prisoner of War, and American Veteran*.

Learning my father's story has transformed my life in many ways. It all began when the VA loan representative stated, "Did you know your father was a POW for almost two years—twice the length of time of the average World War II veteran?" I hope my book will inspire everyone to learn more about their veteran's military story so it can be passed on to future generations.

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.

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 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.

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Vice President, Systemwide Human Resources
Chief Human Resources Officer: Cheryl Lloyd

Senior Director, Internal Communications:
Paul Schwartz

Editors: Andy Evangelista, Wendy Welsh

Design: José Pantoja

Comments/Questions/Share Your Story

Write New Dimensions at:
Internal Communications
University of California, Office of the President
1111 Franklin Street, Oakland, CA 94607
Email: NewDimensions-L@ucop.edu

For benefits questions:

**UC Retirement Administration
Service Center (RASC):**
800-888-8267

Hours:
Monday – Friday,
8:30 a.m. – 4:30 p.m., PT

UCRAYS:
retirementatyour.service.ucop.edu

UCnet:
ucnet.universityofcalifornia.edu/retirees

Want to go green?

Consider signing up for the electronic version of *New Dimensions*. Go to retirementatyour.service.ucop.edu, select "Edit Profile," click "Communication Preferences," under "Communication Type," go to "Newsletters and other General Information" and select "Email."

‘Navigating UC Retiree Health’ webinar, Feb. 27

If you want to gain a better understanding of how to navigate the UC retiree health resources, locally and systemwide, you are invited to attend a webinar on Tuesday, Feb. 27, 10 to 11 a.m. (PT). “Navigating UC Retiree Health for Retirees” will explore the roles of UCnet, UCRAYS, Medicare, the UC medical plans, and more. The session is part of “The Confident Retiree Webinar Series,” which was launched last year to provide UC retirees and emeriti with timely, relevant information on a variety of retirement topics. To register for the webinar scan the QR code to the right or go

to: ucal.us/retirees; under “Retiree News,” find the registration link. For more information on the series, go to: www.myucpension.com/TrackPage/4. At that page, you can view a recording of the previous webinar, “CyberWellness: Cybersecurity essentials checklist for retirees.” Questions regarding the retiree webinar series can be submitted to UCRSwebinars@ucop.edu.

Scan QR code
to register for
webinar.



P.O. Box 24570
Oakland, CA 94623-1570

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Unfortunately, this operational push coincided with staffing shortages related to the COVID pandemic. Even worldwide, organizations found it challenging to recruit and retain qualified individuals for open positions. RASC needed help identifying candidates who could handle the business unit’s growth and would align with the goals of Vice President of Systemwide Human Resources Cheryl Lloyd’s broader transformation initiative. In January of 2023, RASC created a rapid recruitment team through its partnership with organizational consultants Korn Ferry to bring focus and expertise to the task. In addition to recruitment and hiring, the teams also identified areas for

improvement and opportunities for additional efficiencies. Over the next ten months, more than 3,500 candidates were “sourced,” 659 were screened, 195 were submitted for review, and 142 were interviewed. When the project concluded on Oct. 31, 2023, RASC had filled its 55 open positions with highly qualified candidates and achieved an offer acceptance rate of 97 percent. “A scaled version of this model will be helpful in our recruitment efforts in the future,” said Green. “The results far exceeded the business’ expectations and were instrumental in the success of our transformation.”

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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 or by submitting a *UC Benefits Address Change Notice*, available online at ucnet.universityofcalifornia.edu or from the Retirement Administration Service Center at 800-888-8267.



Access your 2023 retirement benefits tax statement

It’s tax season, and if you haven’t accessed or received your 2023 1099-R, the following is information on how to do so safely:

- 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. Go to “Benefit Payments & Taxes” and choose “Tax Statements.” For security purposes, you will be sent an email when you view your statement(s). You will also be required to verify your identity by entering a onetime 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. If you still prefer receiving this form by U.S. mail, make sure your mailing address is always up to date in UCRAYS or call the UC Retirement Administration Service Center at (800) 888-8267.
- Though the deadline to request electronic delivery of your 2023 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.” 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.

