

Sabbatical leave is available only to certain faculty members and academic appointees based on UC Academic Personnel Policies. See your Academic Personnel Office for more information about sabbatical leave.

This checklist explains how your benefits are affected when you go on an approved sabbatical leave, which is for one year or less. If you take any leave without pay or paid leave immediately before or after your sabbatical leave, see the *Leave Without Pay or Paid Leave* checklist. You may wish to go over this information with your local Benefits Office to be sure that you have taken all necessary actions.

If you end UC employment during or after your sabbatical leave, see the *Termination of Employment* checklist and contact your Academic Personnel Office about your obligations to refund some or all of the salary you received during your sabbatical leave.

Need Help?

You can get answers to many of your benefits questions, detailed plan booklets, forms, and UC publications from the UC HR/Benefits website: atyourservice.ucop.edu.

If you can't find the information you need on the website, or you want a printed copy of a publication, ask the Academic Personnel Office, the person in your department who handles benefits, or your local Benefits Office.

Sabbatical Leave

Benefits Checklist

While on Sabbatical Leave

When you are on an approved sabbatical leave, generally you will be eligible to continue most of your UC-sponsored benefits. The chart on pages 2 and 3 explains your benefits options in detail.

UC contributions continue for most plans. Your monthly paycheck must be large enough to cover your employee monthly costs (if any) for your health plans, premiums for employee-paid plans, and other payroll deductions. At certain locations, you must also submit an insurance continuation form.

While most faculty members want to continue their UC-sponsored benefits during sabbatical, if you choose not to, your coverage will end on the last day of the last month for which premiums or contributions are paid. If you cancel coverage when you go on sabbatical leave, when you return from leave you will *not* have a period of initial eligibility (PIE—see page 5) in which to re-enroll in UC-sponsored plans. In addition, separate plan re-enrollment restrictions may apply. See “When You Return From Sabbatical Leave” beginning on page 4 for additional information.

Moving Out of a Plan Service Area:

If you continue UC-sponsored medical or dental coverage and you move during your leave, please note the following:

If you are enrolled in a health maintenance organization (HMO) or Blue

Cross PLUS and you will be out of the plan's service area for more than two months, UC regulations allow you to transfer to a UC-sponsored medical plan that provides service in your new location. You must transfer within 31 days of the date you leave the service area. Contact your local Benefits Office.

You and/or your eligible family members may also need to select a new primary care physician(s). Contact your medical carrier.

If you are enrolled in the PMI Dental Plan and you will be out of the plan's service area for more than two months, you may transfer to the Delta Dental Plan, which provides worldwide coverage. You must transfer within 31 days of the date you leave the PMI service area.

Establishing UCRP Service Credit:

If you are on sabbatical leave at less than 100% time, you will receive prorated UCRP service credit. When you return to your regular duties at UC, for a limited time you may be able to establish (buy back) retirement service credit for any period of your sabbatical for which you did not earn full service credit. Rules for leave buybacks include minimum and maximum leave periods that can be purchased, a payment schedule, and other restrictions. Note that if you wish to buy back service credit for your leave, the sooner you begin, the less it will cost you. For more information, see *The UCRP Buyback Booklet*, which is available online (<http://atyourservice.ucop.edu>).

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While on Sabbatical Leave

Benefit Plan	Benefits Options
Health and Welfare Plans	
Medical Dental Vision Legal	Your coverage continues. Also see “Moving Out of a Plan Service Area” on page 1.
Basic Life Short-Term Disability Senior Management Life	Your coverage continues (at no cost to you) beginning with your first day of leave.
Accidental Death & Dismemberment (AD&D) Supplemental Life Basic Dependent Life Expanded Dependent Life	You may continue coverage. If you are enrolled in Basic Life only, you may continue Basic Dependent Life. If you are enrolled in and continue Supplemental Life, you may continue Basic Dependent Life or Expanded Dependent Life.
Supplemental Disability	You may continue coverage. If you are on sabbatical leave at less than full pay, please see your Benefits Office for details about purchasing an extension to your supplemental coverage.
Business Travel Accident	If you are a faculty member on approved sabbatical leave and you are required to travel as part of your program of research or study, you may be eligible to continue coverage. Contact your local Risk Management Office for information. Otherwise, coverage stops your last day actively at work before your sabbatical leave begins.
Workers' Compensation	Coverage continues for activities arising out of and in the course of UC employment.
UC Retirement Plan, Retirement Savings Program and Other Savings Options	
University of California Retirement Plan (UCRP)	Your UCRP membership continues during your leave. You earn retirement service credit based on the percentage of full-time pay you receive during your leave. If you receive full pay, you receive full service credit. If you do not earn full service credit while on sabbatical leave, you may be able to establish full service credit for this period when you return (see “Establishing UCRP Service Credit” on page 5). Your UCRP contributions and any Capital Accumulation Provision (CAP) balance remain on deposit and you may not withdraw them. You remain eligible for any UCRP benefits for which you were eligible when your leave began.
Retirement Savings Program Defined Contribution Plan Pretax Account	Your contributions remain on deposit and you may not withdraw them. In addition, contributions continue as a percentage of the salary you receive during your leave. (Safe Harbor participants contribute 7.5% of salary paid during leave, up to the Social Security OASDI wage base.)
Defined Contribution Plan After-Tax/Rollover Account Tax-Deferred 403(b) Plan 457(b) Deferred Compensation Plan	Contributions continue during your leave unless you cancel them. If you will earn less than your full salary, you should carefully review the amount you contribute. To stay within your maximum contribution limit for the year, you may need to change or cancel your contributions. Fidelity Investment Tax-Exempt Services Company (FITSCo, 1-866-682-7787) can help you. Consult Academic Personnel Policy to determine whether you are permitted to engage in compensated activity while on sabbatical leave. Note that you may not contribute pay received from another institution to UC's plans. You may, however, be eligible to contribute to a 403(b) plan or 457(b) plan available at the host institution. If you contribute to the host institution's plan(s) and to UC's plan(s), remember that the maximum annual contribution limit applies to the combined total of each plan in which you participate. Consult a tax advisor for assistance.
Social Security	If you are covered by Social Security, contributions continue based on the pay you receive during your leave.
Other Retirement Plans	If you are a member of another retirement plan—such as CalPERS—contact that plan directly for information.
U.S. Savings Bonds	Unless you cancel them, deductions from your paycheck for these investments continue automatically during your leave.

While on Sabbatical Leave

Benefit Plan	Benefits Options
Other Benefits	
Vacation Leave	Fiscal year appointees continue to accrue vacation and must use it during the sabbatical leave. Vacation accrued prior to the leave may be carried over.
Dependent Care Reimbursement Account (DepCare) Health Care Reimbursement Account (HCRA)	Your contributions continue as long as you remain on pay status. Eligible expenses will be reimbursed as usual. SHPS, Inc. must <i>receive</i> your claim forms by the filing deadline of the following year; you forfeit funds left in your account after that date. You may change or cancel your DepCare and/or HCRA salary reduction agreement only during Open Enrollment or when you have an eligible change in your family or employment status. See the <i>Dependent Care Reimbursement Account (DepCare) Summary Plan Description</i> and/or the <i>Health Care Reimbursement Account Summary Plan Description</i> for details.
Tax Savings on Insurance Premiums (TIP)	TIP contributions for your health plan employee monthly costs (if any) continue as long as you remain on pay status.
Automobile and Homeowner/Renter	You may continue coverage. You may also change or cancel your coverage. Call the insurance company for information.
California Unemployment Insurance Program	UC's contributions continue, but you are not eligible to receive benefits while you are on sabbatical leave.

Tax-Deferred 403(b) Plan Loan Program: If you have an outstanding loan, deductions for repayment continue during your sabbatical leave. If your net pay is insufficient to permit payroll deductions for the full loan payment, you must make additional monthly repayments of the balance or repay the outstanding principal in full. Call Fidelity Investments Tax-Exempt Services Company (FITSCo) at 1-866-682-7787 to arrange payments.

If you do not take any action, the outstanding principal will be reported as a taxable distribution. It may be subject to federal and state early distribution penalties.

Service Credit Buyback: If you have a UCRP service credit buyback in progress, your payroll deductions will continue automatically. If you have been on sabbatical for six months or more, please see your local Benefits Office as the buyback may not start again automatically.

Address Changes: While on sabbatical leave, please keep UC advised of your correct *permanent*

address. Changes in your permanent address may affect your eligibility for health plans that have a service area or for benefits under Blue Cross PLUS. In addition, UC needs a correct, current address to keep you informed about your benefits. Notify your local Benefits or Payroll Office or the appropriate person in your department of any address changes.

Enrolling and De-enrolling Family Members: If you continue UC-sponsored coverage while on sabbatical leave, you may enroll newly eligible family members in your plans within 31 days of the date they become eligible to enroll. For other opportunities to enroll in UC-sponsored plans, see *Your Group Insurance Plans*.

You are also responsible for de-enrolling family members who lose eligibility to participate in UC-sponsored plans. Failure to do so within required deadlines may affect continuation rights and/or result in liability for any expenses incurred by UC or the plan due to the ineligible enrollment.

If you do not continue UC-sponsored coverage during your leave, you may not enroll yourself and your eligible family members in certain plans until the next Open Enrollment. Upon request, you will need to provide documentation to verify the relationship of your enrolled family members.

When You Return From Sabbatical Leave

When you return from sabbatical leave, records must be updated, benefits must be activated, and forms must be processed. If you continued coverage during your leave, at some locations coverage continues automatically. At other locations you must re-enroll. **Because procedures vary by location, it is very important that you review your benefits with your local Benefits Office soon after you return to your regular duties at UC.**

The chart on pages 4 and 5 explains your benefits options when you

(continued on page 5)

When You Return From Sabbatical Leave

Benefit Plan	New PIE	Benefits Options
Health and Welfare Plans		
Medical* Dental* Vision* Legal	NO**	<i>If you continued coverage during your leave:</i> Your coverage continues. See “Returning to a Plan Service Area” on page 5. <i>If you did not continue coverage:</i> When you return from sabbatical leave, you will not have a PIE in which to reenroll in UC-sponsored plans; you must wait until the next Open Enrollment. (Please note that the legal plan is not available for enrollment every year.)
Supplemental Life Basic Dependent Life Expanded Dependent Life	NO	<i>If you continued coverage during your leave:</i> Your coverage continues. <i>If you did not continue coverage or if you were not previously enrolled:</i> When you return from sabbatical leave you may apply for coverage at any time. However, you must submit a statement of health and coverage may or may not be approved by the insurance carrier.
Basic Life Short-Term Disability	N/A	Your coverage continues, based on your appointment.
Accidental Death & Dismemberment (AD&D)	N/A	<i>If you continued coverage during your leave:</i> Your coverage continues. <i>If you did not continue coverage or if you were not previously enrolled:</i> You may enroll at any time.
Supplemental Disability	NO YES NO	<i>If you continued coverage during your leave:</i> Your coverage and deductions continue. <i>If you did not continue coverage:</i> If you did not continue coverage because your average paid time dropped below 17.5 hours per week, you will have a new 31-day PIE in which to enroll when you return to work in an eligible position. If you are on leave for less than 120 days, you may re-enroll with the same waiting period you had before your leave. If you are on leave for 120 days or more, you are treated as a newly eligible employee; you may select any waiting period. If you voluntarily cancelled coverage during your leave while remaining eligible to continue, you will not have a PIE to enroll; to reenroll you will need to submit a statement of health to the insurance carrier and your enrollment may or may not be approved.
Business Travel Accident Workers’ Compensation	N/A	Coverage resumes (or continues) on your first day actively working at your regular duties at UC after your sabbatical leave ends.
UC Retirement Plan, Retirement Savings Program and Other Savings Options		
University of California Retirement Plan (UCRP)	N/A	When you return to your regular duties at UC, you begin (or continue) to accrue full service credit based on your appointment. If you did not earn full service credit while on leave, for a limited time you can buy back the portion of your sabbatical for which you did not earn service credit. See “Establishing UCRP Service Credit” on page 5.
Retirement Savings Program Defined Contribution Plan Pretax Account	N/A	Your contributions begin (or continue) automatically as a percentage of your full salary based on your appointment.
Defined Contribution Plan After-Tax Account Tax-Deferred 403(b) Plan 457(b) Deferred Compensation Plan	N/A	<i>If you continued contributions during your leave:</i> Your contributions will continue. You may increase, decrease, or cancel your contributions at any time. <i>If you cancelled contributions or if you were not previously enrolled:</i> You may resume contributions or enroll at any time
Social Security Other Retirement Plans	N/A	If you are covered by Social Security, you and UC continue contributing based on your pay. If you are a member of another retirement plan—such as CalPERS—contact that plan directly for information.
U.S. Savings Bonds	N/A	<i>If you continued payroll deductions during your leave:</i> Your deductions will continue. You may increase, decrease, or cancel your deductions at any time. <i>If you cancelled deductions or if you were not previously participating:</i> You may resume or begin deductions at any time.

* For other opportunities to enroll in UC-sponsored plans, see *Your Group Insurance Plans*.

** You may be eligible for a new PIE if you have a family or appointment change.

When You Return From Sabbatical Leave

Benefit Plan	New PIE	Benefits Options
Other Benefits		
Vacation Leave	N/A	When you return to your regular duties at UC, you begin (or continue) accruing vacation (if eligible) in accordance with the applicable personnel policy for your appointment. For details, see the Academic Personnel Policy.
Dependent Care Reimbursement Account (DepCare) Health Care Reimbursement Account (HCRA)	NO*	<i>If you continued participation:</i> Contributions continue automatically until the end of the plan year. <i>If you cancelled participation or if you were not previously enrolled:</i> You may enroll or re-enroll during the next Open Enrollment.
Tax Savings on Insurance Premiums (TIP)	NO*	<i>If you continued participation:</i> Contributions continue automatically. <i>If you cancelled your medical coverage:</i> Ask your Benefits Office about your options.
Automobile and Homeowner/Renter	N/A	<i>If you continued coverage during your leave:</i> Payroll deductions continue. <i>If your coverage lapsed:</i> You may re-enroll at any time. Call the insurance company directly.
California Unemployment Insurance Program	N/A	Coverage continues automatically.

* You may be eligible for a new PIE if you have a family or appointment change.

return to work at UC with an eligible appointment.

In addition, you must meet all eligibility requirements when you return to your regular duties at UC. If you have family members eligible for coverage, contact your local Benefits Office to enroll them within your new 31-day PIE.

Period of Initial Eligibility (PIE)

This is a time during which you and/or your eligible family members may enroll in UC-sponsored plans. The PIE starts on the first day of eligibility (for example, the day you return to work or pay status). For internet transactions, it ends 31 days later. For paper transactions, it ends 31 days later or on the last working day of the 31-day period, whichever comes first. UC defines a working day as a normal business day—Monday through Friday, excluding holidays—for your local Benefits or Payroll Office.

Returning to a Plan Service Area:

If you are returning to your previous HMO plan, Blue Cross PLUS, or PMI service area, you may transfer back to your previous plan within 31 days of your return to the plan's service area. You and/or your eligible family members may also need to select other primary care physician(s) or a PMI dentist. Contact your local Benefits Office to transfer plans and your medical carrier or PMI to change providers.

Benefits Transactions and

Deadlines: When making benefits changes, it is your responsibility to complete your transactions within UC deadlines.

Although UC makes every effort to ensure your enrollment transactions are completed accurately, you should review your paycheck stub or direct deposit statement carefully to be sure it matches your benefits choices. *It is your responsibility to promptly notify your local Benefits or Payroll Office of any errors.*

If You Do Not Return to UC Employment

If there are exceptional or unexpected circumstances that make it necessary for you to end UC employment during or soon after your sabbatical leave, contact your Academic Personnel Office for information about your obligations to refund salary you received during your sabbatical leave. Contact your Benefits Office and read the *Termination of Employment* checklist. Ask your local Benefits Office for more information about continuing group coverage.

If you decide to retire while on sabbatical leave, see the *Retirement Handbook* for information. Because a sabbatical leave may affect your retirement benefits, be sure to discuss your options with your local Benefits Office *before* you elect to retire.

(continued on back)

California Unemployment

Insurance Program: UC contributions end when your sabbatical leave ends. Depending upon your circumstances, you may or may not be eligible for Unemployment Insurance benefits. You can get details and apply for benefits at your local office of the California State Employment Development Department (EDD). If you work outside California, contact the comparable state agency for your location.

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, retirees, 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, employer contributions and monthly costs at any time. Health and welfare benefits are not accrued or vested benefit entitlements. UC's contribution toward the monthly cost of the coverage is determined by UC and may change or stop altogether, and may be affected by the state of California's annual budget appropriation. 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.

The Consolidated Omnibus Budget Reconciliation Act of 1985 (COBRA) provides for continued coverage for a certain period of time at applicable monthly COBRA rates if you, your spouse, or your dependents lose group medical, dental, or vision coverage because you terminate employment (for reasons other than gross misconduct); your work hours are reduced below the eligible status for these benefits; you die, divorce, or are legally separated; or a child ceases to be an eligible dependent. Note: The continuation period is calculated from the earliest of these qualifying events and runs concurrently with any other UC options for continued coverage. See your Benefits Representative 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 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.

Website address: <http://atyourservice.ucop.edu>



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