

BENEFITS eNEWSLETTER

A Quarterly Newsletter brought to you by UC San Diego Campus Human Resources Benefits Unit

Q2 2021 Issue

4.05.2021



Retirement Counseling Sessions

Planning to retire soon? Don't miss the opportunity to attend the Retirement Counseling Sessions hosted by the Benefits Unit during the month of April.

The workshops include:

- **Retirement 101** – Overview of UCRP and Retirement Estimates
- **Retirement Process** – Retirement Administration Service Center (RASC) Process for Retirement
- **Insurance Continuation Checklist** – Introduction to Retiree Health Benefits and Required Forms
- **Retiree Health** – Detailed overview of retiree health and welfare benefits, eligibility, retiree healthcare costs, and what UC requires when you become eligible for Medicare



You can view the schedule on [Blink](#) along with the corresponding Zoom links. No registration required.

Note: Some of the workshops will be offered in Spanish.

Family Member Eligibility Verification

If you recently enrolled in benefits and added dependents to your coverage, either due to a life event or during Open Enrollment, you will need go through the Family Member Eligibility Verification (FMEV) process.

- **UnifyHR** will send you a packet requesting information to verify your dependent(s)
- If you fail to complete the verification process, your unverified dependent(s) will be de-enrolled from your benefits
- You can find detailed information about the [FMEV process](#) on UCnet



BENEFITS eNEWSLETTER

A Quarterly Newsletter brought to you by UC San Diego Campus Human Resources Benefits Unit

Q2 2021 Issue

4.05.2021

Temporary Relief for your Flexible Spending Account (FSA)

To support faculty and staff who may have experienced a disruption in FSA-eligible services in 2020, or who need to make changes to their 2021 FSA elections, UC has approved a few temporary changes outlined below.

2021 FSA Relief Provisions for 2020 Funds

- Carry-over of full 2020 Health FSA remaining balance
- Dependent Care FSA grace period extension through December 31, 2022
- Increase in maximum age for dependents to 13 years old

FSA Changes without Life Event for 2021 Funds

- Enroll prospectively in an FSA or make changes to 2021 elections
- Changes can be made 2 times per FSA plan type through October 29, 2021
- Dependent Care FSA annual maximum increased to \$10,500

To allow for the implementation of these changes, the current and former FSA administrators – Wex (formerly Discovery Benefits) and WageWorks – will impose a temporary “blackout period” from April 16, 2021 through end of May 2021. During this time claims incurred in 2020 cannot be processed for reimbursement. For more information about the pandemic relief provisions, please visit [UCnet](#) or review the detailed [FAQs](#).

Note: The deadline for submitting Health FSA claims for expenses incurred in 2020 is April 15, 2021, prior to the blackout. This deadline **has not been extended** to the new IRS income tax filing deadline of May 17, 2021.

Be Careful About Financial Adviser Solicitations



It's easy to confuse unauthorized financial advisers with UC-contracted financial planning services. UC contracts exclusively with Fidelity Investments for all financial education and guidance services. Their dedicated team is well-versed in UC retirement benefits and can meet with Faculty and Staff onsite or over the phone.

Look at the information below to schedule a one-on-one consultation with a UC-dedicated retirement planner.

BENEFITS eNEWSLETTER

A Quarterly Newsletter brought to you by UC San Diego Campus Human Resources Benefits Unit

Q2 2021 Issue

4.05.2021

Financial Planning

UC partners with Fidelity Investments to provide you with no-cost financial planning. Local representatives are available to virtually meet with Faculty and Staff via one-on-one or group sessions.



One-on-One Financial Planning

Take advantage of an individual financial planning session for assistance with planning for retirement, guidance on investing, or information on how to enroll in your retirement savings plans. No question is too big or too small.

[Schedule an individual appointment](#)

Retirement Presentations

Bring more value to your department meetings by having our UCSD Retirement Planners present about the UC Retirement System and other financial topics. We can tailor our presentations to fit your department meeting. To schedule, simply select the link below, enter your information and we will contact you to schedule a visit to your department. Se habla Español!

[Schedule a meeting for your department](#)

Should you need additional assistance with scheduling your individual appointment/department meeting, email our dedicated retirement planners directly:

- Ron Appling Ronald.Appling@fmr.com
- Matt Vallejo Matthew.Vallejo@fmr.com

Behavioral Health Benefits



Mental health and physical health go hand in hand, so UC's medical coverage includes behavioral health benefits for mental health services and substance abuse treatment. Members can use their behavioral health benefits for sessions with counselors, psychologists or psychiatrists to address a variety of conditions including depression and anxiety, alcohol and drug abuse, or medication management. To learn more behavioral health and substance abuse coverage and steps to access care, please visit [Behavioral Health Benefits](#) on UCnet.

BENEFITS eNEWSLETTER

A Quarterly Newsletter brought to you by UC San Diego Campus Human Resources Benefits Unit

Q2 2021 Issue

4.05.2021

Benefits Workshops

Date/Time	Topics
12 Apr – 10:30 a.m. – 12:30 p.m.	New Hire Benefits Orientation – Register <i>Facilitated by UCSD Senior Benefits Analyst</i>
15 Apr – 11:30 a.m. – 1:00 p.m.	Preparing for Retirement – Register <i>Facilitated by Fidelity</i>
21 Apr – 9:00 a.m. – 9:45 a.m.	UC Retirement Choice Program – Register <i>Facilitated by Fidelity</i>
21 Apr – 10:00 a.m. – 10:45 a.m.	Guide to Investing in the UC Retirement Savings Program – Register <i>Facilitated by Fidelity</i>
21 Apr – 1:00 p.m. – 1:45 p.m.	Create a Budget, Ditch Your Debt and Start Saving for the Future – Register <i>Facilitated by Fidelity</i>
26 Apr – 10:30 a.m. – 12:30 p.m.	New Hire Benefits Orientation – Register <i>Facilitated by UCSD Senior Benefits Analyst</i>
10 May – 10:30 a.m. – 12:30 p.m.	New Hire Benefits Orientation – Register <i>Facilitated by UCSD Senior Benefits Analyst</i>
19 May – 9:00 a.m. – 9:45 a.m.	Your UC Retirement System – Register <i>Facilitated by Fidelity</i>
19 May – 10:00 a.m. – 10:45 a.m.	Basics of When and How to Claim Social Security – Register <i>Facilitated by Fidelity</i>
19 May – 1:00 p.m. – 1:45 p.m.	UC Retirement Choice Program – Register <i>Facilitated by Fidelity</i>
24 May – 10:30 a.m. – 12:30 p.m.	New Hire Benefits Orientation – Register <i>Facilitated by UCSD Senior Benefits Analyst</i>
9 Jun – 11:30 a.m. – 1:00 p.m.	Caring for Aging Parents: Smooth Transition – Register <i>Facilitated by Bryan Stebel, CFP</i>
10 Jun – 1:30 p.m. – 2:30 p.m.	Medicare and your UC Sponsored Plan – Register <i>Facilitated by Debra Wells, HCF</i>

BENEFITS eNEWSLETTER

A Quarterly Newsletter brought to you by UC San Diego Campus Human Resources Benefits Unit

Q2 2021 Issue

4.05.2021

14 Jun– 10:30 a.m. – 12:30 p.m.	New Hire Benefits Orientation – Register <i>Facilitated by UCSD Senior Benefits Analyst</i>
16 Jun – 9:00 a.m. – 9:45 a.m.	Your UC Retirement System – Register <i>Facilitated by Fidelity</i>
16 Jun – 10:00 a.m. – 10:45 a.m.	Women and Investing – Register <i>Facilitated by Fidelity</i>
16 Jun– 11:00 a.m. – 11:45 a.m.	Tax Efficient Investing – Register <i>Facilitated by Fidelity</i>
16 Jun– 12:00 p.m. – 12:45 p.m.	UC Retirement Choice Program – Register <i>Facilitated by Fidelity</i>
17 Jun – 11:30 a.m. – 1:00 p.m.	Making the Most of Social Security – Register <i>Facilitated by Fidelity</i>
28 Jun – 10:30 a.m. – 12:30 p.m.	New Hire Benefits Orientation – Register <i>Facilitated by UCSD Senior Benefits Analyst</i>

