

# Retirement Benefits for University of California Retirees as of January 1, 2005

	Retired 7/1/02 or After		
	Married	Same Sex Domestic Partner*	Opposite Sex Domestic Partner
<b>RETIREMENT BENEFITS</b>			
<b>AT RETIREMENT</b>	Marriage certificate dated at least one year prior to retirement date. Certificate presented at retirement.	<ul style="list-style-type: none"> <li>• State of California Registry dated at least one year prior to retirement date. California Registry presented at retirement. OR</li> <li>• If No California Registry: UC Declaration of Domestic Partnership (UC Declaration) required, plus 3 supporting documents, dated at least one year prior to retirement.</li> </ul>	<ul style="list-style-type: none"> <li>• State of California Registry dated at least one year prior to retirement date. California Registry presented at retirement. (Available only to those age 62 and over and SS eligible) OR</li> <li>• If No California Registry: UC Declaration of Domestic Partnership (UC Declaration) required, plus 3 supporting documents, dated at least one year prior to retirement.</li> </ul>
<b>POST-RETIREMENT SURVIVOR CONTINUANCE</b>	Marriage must have been at least one year prior to retirement and continuous until death. Documentation already submitted at retirement.	Domestic Partner relationship must have been for at least one year prior to retirement and continuous until death. Documentation already submitted at retirement.	Domestic Partner relationship must have been for at least one year prior to retirement and continuous until death. Documentation already submitted at retirement.
<b>DEATH WHILE ELIGIBLE TO RETIRE (DWE)</b>	No marriage duration required. Marriage certificate must be presented at death.	No domestic partner relationship duration required. California Registry presented at death. If No California Registry member must have submitted a UC Declaration before his/her death (i.e., pre-registration required) plus 3 supporting documents	No domestic partner relationship duration required. California Registry presented at death. If No California Registry member must have submitted a UC Declaration before his/her death (i.e., pre-registration required) plus 3 supporting documents
<b>PRE-RETIREMENT SURVIVOR BENEFITS (for active and UCRP disabled employees only with at least 2 years service credit)</b>	Marriage certificate dated at least one year prior to death—presented at death	California Registry dated at least one year prior to death—presented at death. If No California Registry member must have submitted a UC Declaration before his/her death (i.e., pre-registration required) plus 3 supporting documents	California Registry dated at least one year prior to death—presented at death. If No California Registry member must have submitted a UC Declaration before his/her death (i.e., pre-registration required) plus 3 supporting documents
<b>TERMINATION OF RELATIONSHIP</b>	Copy of Final Dissolution of Marriage required.	Copy of California State Notice of Termination of Domestic Partnership form or UC Domestic Partnership Termination Form.	Copy of California State Notice of Termination of Domestic Partnership form or UC Domestic Partnership Termination Form.
<b>COMMUNITY PROPERTY</b>	Division of assets determined by court and processed by Special Claims unit.	Process to be determined	Process to be determined
<b>JANUARY 1, 2005 (Contingent Annuitant Changes Allowed)</b>	Not Applicable	Not Applicable	Not Applicable
<b>JANUARY 1, 2005 (Post-Retirement Survivor Continuance Allowance)</b>	Not Applicable	Not Applicable	Not Applicable

\* UC will accept all other States' substantially equivalent registry in the same manner as California's registry only for same sex domestic partners.

Retired Before 7/1/02		Retired Before 7/1/02—Deceased Before 1/1/05	
Same Sex Domestic Partner*	Opposite Sex Domestic Partner	Same Sex Domestic Partner*	Opposite Sex Domestic Partner
Not Applicable	Not Applicable	Not Applicable	Not Applicable
See last two rows below	See last two rows below	See last two rows below	See last two rows below
Not Applicable	Not Applicable	Not Applicable	Not Applicable
Not Applicable	Not Applicable	Not Applicable	Not Applicable
Copy of California State Notice of Termination of Domestic Partnership form or UC Domestic Partnership Termination Form.	Copy of California State Notice of Termination of Domestic Partnership form or UC Domestic Partnership Termination Form.	Not Applicable	Not Applicable
Process to be determined	Process to be determined	Not Applicable	Not Applicable
If elected option at retirement naming Domestic Partner as a Contingent Annuitant, can re-elect another option that gives the member an increased benefit—benefit paid prospectively from 1/1/05. Will have until June 30, 2005 to re-elect.	If elected option at retirement naming Domestic Partner as a Contingent Annuitant, can re-elect another option that gives the member an increased benefit—benefit paid prospectively from 1/1/05. Will have until June 30, 2005 to re-elect.	Not Applicable	Not Applicable
Domestic Partner relationship must have been for at least one year prior to retirement and continuous until death. Will also need to present California State Registry or UC Declaration and 3 supporting documents. Benefits prospective from 1/1/05	Domestic Partner relationship must have been for at least one year prior to retirement and continuous until death. Will also need to present California State Registry or UC Declaration and 3 supporting documents. Benefits prospective from 1/1/05	Domestic Partner must self-identify if not named as Contingent Annuitant. California Registry required because member cannot declare Domestic Partner relationship. Benefits prospective from 1/1/05	Domestic Partner must self-identify if not named as Contingent Annuitant. California Registry required because member cannot declare Domestic Partner relationship. Benefits prospective from 1/1/05

# Health and Welfare Benefits for University of California Employees and Retirees as of Ja

	EMPLOYEES		RETIREES	
	Domestic Partner of Employees			Retired 7/1/02 or After
	Same Sex Domestic Partner*	Opposite Sex Domestic Partner	Married	Same Sex Domestic Partner*
HEALTH AND WELFARE BENEFITS				
ELIGIBILITY TO ENROLL	State of California Registry, OR meets UC's requirements	State of California Registry, OR meets UC's requirements (one partner must be 62+ and eligible to receive Social Security benefits)	Legally married	State of California Registry, OR meets UC's requirements
ENROLLMENT DURING PERIOD OF INITIAL ELIGIBILITY (PIE)	Enrollment by form UPAY 850. If employee is a new hire, enrollment via new hire Web	Enrollment by form UPAY 850. If employee is a new hire, enrollment via new hire Web	Enrollment by form UBEN 100	Enrollment by form UBEN 100
TERMINATION OF RELATIONSHIP	Form UPAY 850  COBRA packets should be sent to former domestic partner if cancellation is due to a termination of the relationship or death of employee	Form UPAY 850  COBRA packets should be sent to former domestic partner if cancellation is due to a termination of the relationship or death of employee	Form UBEN 100  COBRA packets should be sent to former spouse if cancellation is due to a termination of marriage or death of retiree.	Form UBEN 100  COBRA packets should be sent to former domestic partner if cancellation is due to a termination of the relationship or death of retiree

\* UC will accept all other States' substantially equivalent registry in the same manner as California's registry only for same sex domestic partners.

	Retired Before 7/1/02		Retired Before 7/1/02—Deceased Before 1/1/05	
Opposite Sex Domestic Partner	Same Sex Domestic Partner*	Opposite Sex Domestic Partner	Same Sex Domestic Partner*	Opposite Sex Domestic Partner
State of California Registry, OR meets UC's requirements (one partner must be 62+ and eligible to receive Social Security benefits)	State of California Registry, OR meets UC's requirements	State of California Registry, OR meets UC's requirements (one partner must be 62+ and eligible to receive Social Security benefits)	State of California Registry, OR meets UC's requirements	State of California Registry, OR meets UC's requirements (one partner must be 62+ and eligible to receive Social Security benefits)
Enrollment by form UBEN 100	Enrollment by form UBEN 100	Enrollment by form UBEN 100	Coverage continues if Domestic Partner was on health plan prior to member's death and receives post retirement survivor continuance. Benefits prospective from 1/1/05. Enrollment by form UBEN 100	Domestic Partner must self-identify if not named as Contingent Annuitant. Benefits prospective from 1/1/05. Enrollment by form UBEN 100
Form UBEN 100	Form UBEN 100	Form UBEN 100	Not Applicable	Not Applicable
COBRA packets should be sent to former domestic partner if cancellation is due to a termination of the relationship or death of retiree	COBRA packets should be sent to former domestic partner if cancellation is due to a termination of the relationship or death of retiree	COBRA packets should be sent to former domestic partner if cancellation is due to a termination of the relationship or death of retiree	Not Applicable	Not Applicable