

Transferring from one UC location to another

One of the advantages of working for UC is the ability to advance your career anywhere within the system. And, if you take a job at another UC campus, medical center, or the Lawrence Berkeley National Lab, your benefits move with you. However, there are actions that you need to take to ensure a smooth transition.

You'll want to take action any time your transfer happens within 120 days of leaving your previous location. However, even if your break in employment is more than 120 days, it's best to make sure your new location is aware of your previous service so that your records can be coordinated.

To make sure your vacation, sick leave, UCRP service credit and other benefits information transfer properly, it's a good idea to touch base with the Benefits Office at both the location you are leaving and the one you are joining.

In general, you may not change your insurance benefits as a result of your transfer; your current benefits continue at your new location. Therefore, you should **not** use the At Your Service Online website to enroll in your benefits at your new location.

Here's a list of things to do:

- Talk to a benefits representative or the person in your department who handles benefits at the location you are leaving. Ask the representative to fill out an Inter-location Transfer form (UFIN301). [[LINK TO FORM](#)]
- Deliver the UFIN301 form to the benefits office at your new location. Be sure to keep a copy for your records.
- Review your first paycheck from your new location carefully to ensure all of your benefit plans have transferred accurately.

Medical & Dental Benefits

- Verify that you can continue in your current medical plan since availability may vary by location. If your plan is not available at your new location, you will need to enroll in a new plan.
- If you are enrolled in a medical plan with a service area and/or DeltaCare USA, you may need to change your primary care physician and/or dentist. Call your plan directly to make any changes.
- You may receive a COBRA continuation packet for health benefits. You can disregard that information since your benefits should continue at your new location if you provide the UFIN301 form.

Flexible Spending Accounts (FSAs)

- Unless you have a qualifying event, you must continue your participation in the Health and/or Dependent Care flexible spending account plans at the same annual contribution level. If any monthly contributions are missed due to payroll deadlines, the new location must make a

retroactive adjustment so that coverage and contributions are continuous.

403(b) and 457(b) Plans

- If you are contributing to the 403(b), the 457(b) or the DC After-Tax plans, contact Fidelity Retirement Services (netbenefits.com or 866-682-7787) to set up your payroll deduction at your new location. Your contribution election is subject to payroll deadlines, so you may miss a payroll deduction.
- Make sure the combined contributions from the two locations do not exceed the IRS-allowed maximum annual contributions. The current maximum annual contribution for each plan is \$16,500 (\$22,000 if you are 50 or older at any time during the calendar year).
- If you have a 403(b) loan, your loan payment may be delayed during the transition to your new location. Contact Fidelity Retirement Services and the payroll office at your new location to ensure your loan payments continue without interruption.

Transferring Employees from One UC Location to Another

One of the advantages of working for UC is the ability for our employees to advance their career anywhere within the system. And, if they take a job at another location without a break in service, the benefits should move with them.

To make sure their vacation, sick leave, UCRP service credit, retirement savings program and other benefits information transfer properly, it's a good idea for benefits representatives at both the locations to coordinate and work closely with the employee.

Transferring employees do not have a PIE as a result of the transfer; in general, current benefits continue at the new location. Changes are then normally done at the next Open Enrollment.

Here's a short list of things that should be done to assist the employee:

- Normally the benefits representative or the person in the departing department that handles (processes or responsibilities can vary from campus to campus) should assist the employee complete the **Interlocation Transfer form (UFIN301)**.[\[LINK TO FORM\]](#) It's your responsibility to make sure the form gets to the receiving campus.
- If necessary, representatives from both locations may need to further coordinate to assure that the proper information is input into the new payroll system.

Medical & Dental Benefits

- The receiving campus should verify that the employee can continue in the same medical plan since availability can vary by location. If the employee's plan is not available in your new location, the employee may enroll in a new plan.
- If the employee is enrolled in a medical plan with a service area and/or DeltaCare USA, the employee may need to change the primary care physician and/or dentist.
- The employee may receive a COBRA packet for continuing health benefits. You can inform the employee to disregard that information since benefits should continue at the new location.

Flexible Spending Accounts

- When an employee transfers to a new UC location, participation in the flexible spending account plans remain at the same contribution level. If any monthly contributions were missed due to payroll deadlines, the new location must make a retroactive adjustment so that coverage and contributions are continuous.

403(b) and 457(b) Plans

- If the employee is contributing to the 403(b), the 457(b) or the DC After-Tax plans, the employee will need to redo the contribution election for

the new location. Refer the employee to Fidelity Retirement Services (netbenefits.com or 866-682-7787). Deferral elections are subject to payroll deadlines so contributions may be missed.

- Maximum annual contribution information should be transmitted from the departing campus to the receiving campus to assure that the employee does not inadvertently over-contribute to the tax-deferred savings plans. See UFIN 301 form.
- To ensure that any existing 403(b) loan repayments continue, coordination with the departing campus and/or Fidelity Retirement Services may be necessary.

Accounting Manual Information on Interlocation Transfer

<http://www.ucop.edu/ucophome/policies/acctman/p-196-38.pdf>