



***Are you a
transferring employee
from another UC
campus to LBNL?***

**Please read the following
important information
regarding your
UC-sponsored benefit plans.**



Important Benefits Information for UC-System Transferring Employees

If you transferred to LBNL from another UC location, you must take action to re-enroll in your currently elected health care and retirement savings plans.

Important Note: You cannot change any of your elected plans, unless you have a qualifying event, such as a change in personal or family status.

Health and Welfare Plans

Do not use the UC "At Your Service" website to re-enroll. The LBNL HR Benefits office must verify your previous enrollment and coverage end date with your previous location; you will need to complete an Enroll, Change, Cancellation or Opt Out form (UPAY 850 form) and submit your completed form to the HR Benefits office at MS 90R2121. *Only a change in your residence would allow you to make a change to your medical plan.*

Flexible Spending Accounts

Do not use the UC "At Your Service" website to re-enroll. The LBNL HR Benefits office must verify your previous election and contribution balance with your previous location; let the Benefits office know if you enrolled in a flexible spending account and what your annual goal amount was with your *previous* location.

Tax Deferred 403(b) Plan: Call Fidelity at (866) 682-7787 to elect a new deferral amount and to inform them that you have transferred to a new UC location, specifically to LBNL. Fidelity must transmit your salary deferral election to LBNL payroll. LBNL payroll processing deadlines may impact the application of the salary deferral. *Be careful not to exceed your Maximum Annual Contribution limit between the two locations -- LBNL does not track what you've already contributed year-to-date.*

457(b) Deferred Compensation Plan: Call Fidelity at (866) 682-7787 to elect a new deferral amount and to inform them that you have transferred to a new UC location, specifically to LBNL. Fidelity must transmit your salary deferral election to LBNL payroll. *Note that there is a mandatory delay of one month before the deferral election will be applied to your LBNL pay.* For example, if you contact Fidelity by 5:00 p.m. on the last business day of August, your 457(b) deferral will be applied to your September earnings which are paid on your October 1 check. *Be careful not to exceed your Maximum Annual Contribution limit between the two locations -- LBNL does not track what you've already contributed year-to-date.*

403(b) Loans: If you are in the process of repaying a 403(b) loan, please call Fidelity at (866) 682-7787 to inform them that you have transferred to a new UC location, specifically to LBNL. Fidelity *must* transmit your loan information to LBNL payroll.

Sick Balance and Prior UC Service Information: Complete the LBNL Prior Service Verification form then send it to your former employer's Payroll office. Once the form has been returned to you, review the information for accuracy then forward it to LBNL Payroll office for processing.

Please contact the LBNL HR Benefits office for any questions.

Phone (510) 486-6403 or Email benefits@lbl.gov

