

This is part of a package proposal. UAW reserves the right to withdraw this package proposal at any time, at its sole discretion and without penalty. If this package proposal is not accepted as written in its entirety and without modification as described below, this proposal will be declared to be void and non-existent and the Union will return to bargaining from its language proposed prior to this package proposal.

Article XX - Benefits

A. GENERAL CONDITIONS

1. Academic Researchers are eligible to participate in the retirement, medical, dental and other benefit programs to the same extent as Senate Faculty.
2. The Union reserves the right to bargain in coalition with other Unions at UC regarding University benefits. Any conditions agreed upon during coalition bargaining will be applied to the current Academic Researchers contract.

B. RETIREMENT

1. Academic Researchers shall be eligible to purchase UCRP Service credits equal up to the length of their service as a UC Postdoctoral Scholar. The cost of purchasing these credits shall be no greater than the amount that the Academic Researcher would have contributed to UCRP had they been eligible while serving as a Postdoctoral Scholar.

C. HEALTH AND WELLNESS BENEFITS

1. The University Health and Welfare Plans provide an annual open enrollment period during which eligible Academic Researchers may elect to change specific plan or coverage options. Open enrollment provides an opportunity for Academic Researchers to choose plans, enroll in new or additional plans, and enroll or disenroll family members. Open enrollment for Academic Researchers will normally be held in November and take effect on January 1 of the following year.
2. The University Health and Welfare Plans provide a period initial eligibility (PIE) during which Academic Researchers and their family members may enroll in plans. The PIE will take place within 31 days of initial eligibility. A new PIE may result from a change in family status, employment, immigration status as well as

leave without pay or loss of other group insurance.

3. For informational purposes only, a brief outline of benefit programs in effect on the date the Agreement is signed is found in Appendix ____. The UAW and the University understand and agree that the descriptions contained in Appendix ____ do not completely describe the coverage or eligibility requirements for each plan, the details of which have been independently communicated to UAW.
4. For details on specific eligibility for each program, see the applicable documents, agreements, regulations, or contracts. Academic Researchers may obtain detailed information by contacting _____.
5. The costs for plans to which the University does not contribute are to be paid by Academic Researchers normally through payroll deduction.
6. The University shall continue the current Academic Researcher plans, premiums, assessments and fees with modification only as enumerated in this Article or Appendix ____, unless aspects of the plan design are changed by the plan carrier.

D. OTHER BENEFITS

1. Other University benefits for which Academic Researchers are eligible include, but are not limited to, Business Travel Accident Insurance, Family Care Resources, Flexible Spending Accounts, Homeowner/Renter/Auto Insurance, Legal Insurance, Long-Term Care Insurance, Short-term and/or Long-term Disability, Life Insurance, Accidental Death and Dismemberment Plan, Pet Insurance, Tax Savings on Insurance Premiums (TIP) Plan, and Tuition Discounts.

E. JOINT BENEFITS COMMITTEE (JBC)

1. Purpose: The primary purpose of the JBC is to review Academic Researcher benefits plans and to make recommendations for improvements or changes.
2. Composition: Each party shall select 2 members to serve on the JBC. With mutual agreement, the parties may have additional representatives on the JBC.
3. Meetings: The JBC shall meet at least quarterly, or more frequently if needed.

4. JBC Activities will include:
 - a. Review current procedures utilized by the University in its annual renewal process for Academic Researcher benefit plans;
 - b. Review reports of complaints or programs issues from the prior calendar year and recommend methods of and means to resolve them;
 - c. Discuss goals and trends for renewal for the upcoming plan year;
 - d. Discuss and recommend agreed upon improvements as needed;
 - e. Provide agreed upon reports of the JBC meetings for Union and University leadership on an agreed upon schedule; and
 - f. Other agreed upon activities.

5. Additionally, the JBC may:
 - a. Review and discuss Requests for Renewals during April and May;
 - b. Jointly meet with University consultants during April and May;
 - c. Jointly provide recommendations to University consultants during April and May; and
 - d. Review recommendations for program renewals during June and July.

6. Sharing of Information: The Union and the University agree that they will each provide each other relevant and necessary information related to the University's decisions about benefits offerings and costs. The University will share information with the Union to allow the Union the opportunity to ensure the proper calculation of premiums and the application of relevant health care regulations. Both parties understand and agree that some of this material contains information that is not available to the public and therefore the parties agree to enter into appropriate confidentiality agreements covering this information. With regard to proprietary information, the parties agree that each will contact the third party whose information it is and ask that, subject to a confidentiality agreement, the proprietary information be shared with the Union or the University. Both the Union and the University retain the right to refuse to provide certain relevant and necessary information based on defenses available under HEERA.

Among the information the parties agree to share is:

- a. Cost for Plan Design Changes including aggregate increased cost to the University;
- b. Goals/Trends information;
- c. Utilization reports will include the following information, when and if available from each of the health plan carriers:

- d. Demographics including geographic distribution, average membership for Academic Researchers and eligible family members;
 - e. Utilization data for each of the Academic Researcher health plans;
 - f. Pharmacy utilization data for each of the Academic Researcher health plans;
 - g. High claims information for each of the Academic Researcher health plans;
7. All information will be provided in aggregate numbers.