

July 15, 2016

Academic Senate Members
Academic Senate, Irvine Division

RE: Necessary Documentation for the Survivor's Benefit for Domestic Partners

Dear Colleagues:

If you are in a domestic partnership, we urge you to immediately file a UBEN-250 form. The form can be found [here](#).

The UC Retirement Plan (UCRP) offers a survivor's benefit to qualifying domestic partners. If a member of the plan dies while still an active employee, UCRP provides survivor income to the surviving domestic partner. This benefit is available to domestic partners regardless of the age of the partners.

The specifics of this benefit can be found in the UC brochure: "[Your Guide to Survivor and Beneficiary Benefits](#)".

Domestic partners who are not registered with the State of California (or other state) – both same and opposite sex - must submit to the university a UC Declaration of Domestic Partnership form (UBEN-250) in order to qualify for this benefit.

This form must be submitted prior to the death of a partner; if not, the surviving partner will not be eligible for the UCRP Survivor Income, even if they had otherwise satisfied the criteria for being domestic partners. Filing this form is independent of whether domestic partners receive university benefits; receiving other health and welfare benefits does not qualify domestic partners for this benefit, nor does not receiving other benefits disqualify domestic partners.

Domestic partners who are registered with California or other state jurisdiction do not need to submit this form,¹ but we are bringing this matter to your attention to help ensure that all domestic partners who are not state registered are aware of the need to file the UBEN-250. In particular, opposite-sex partners need to be aware that while registration is only required for health and welfare benefits if at least one of the partners is 62 years of age, **the survivor benefit requires registration regardless of age.** Unfortunately, the relevant university literature does not make the latter explicitly clear that there is a different definition of opposite-sex domestic partner for the retirement survivor benefit, believing erroneously that the age 62 requirement holds for this benefit as it does for other health and welfare benefits.

This lack of proper information has resulted in a significant hardship for one our colleagues at a sister campus. Although they met the UCRP criteria for domestic partners, for the reasons cited above they were not made aware of the need to file a UBEN-250 (although other documents were filed with their Dean attesting to their domestic relationship). Thus, for the sole reason that they did not submit a UBEN-250, the surviving spouse was denied the UCRP Survivor Income benefit to which they would have been otherwise entitled.

¹ Partners who have recently registered with California may wish to submit a UBEN-250 if nearing retirement as this allows establishment of an earlier beginning or a partnership. This can preserve a partner's right to certain survivor benefits for which there is a one-year partnership requirement. Please consult "Your Guide to Survivor and Beneficiary Benefits" for details.

It is our view that for reasons of equity, all UC health and welfare benefits, not just the survivor benefit, should be available to domestic partners without regard to sex or age, but given the current requirements our present concern is that until the policies are changed it is important that proper information be disseminated. *Thus, if you are in a domestic partnership, we urge you to immediately file a UBEN-250 form.*

Sincerely,

A handwritten signature in black ink that reads "Alan Terricciano". The script is fluid and cursive.

Alan Terricciano, Chair
Divisional Senate Assembly, Irvine
Professor of Dance

A handwritten signature in brown ink that reads "Rob C May". The script is cursive and somewhat stylized.

Robert C. May
Chair, University Committee on Faculty Welfare, Health Care Task Force
Distinguished Professor of Philosophy and Linguistics
UC Davis