

**Department of Personnel Administration
Memorandum**

TO: Personnel Management Liaisons (PML)

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| SUBJECT: Long Term Disability Insurance Open Enrollment for Excluded Employees | REFERENCE NUMBER: 2004-069 |
| DATE ISSUED: 12/13/04 | SUPERSEDES: |

This memorandum should be forwarded to:

**Personnel Officers
Personnel Transactions Supervisors
Personnel Transactions Staff**

FROM: Department of Personnel Administration
Benefits Division

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Open enrollment for the Long Term Disability (LTD) Insurance Plan for excluded employees will be held from **February 1, 2005 through March 4, 2005**. This PML provides information on the eligibility criteria, effective dates of coverage, and the various communication methods that will be used to provide open enrollment information to eligible employees.

Eligibility Criteria

An employee must be permanent or probationary, excluded from collective bargaining, have a time base of half-time or greater, and have one of the following designations:

- Managerial (M, E59, E79, E99)
- Supervisory (S, E48, E58, E68, E78, E98)
- Confidential (C, E97)
- Excluded/Exempt (E88, E89)
- E01 through E21, E67, E77

Employees on limited-term appointments who otherwise meet the eligibility criteria may enroll in the LTD plan only if they have a mandatory right of return to a position that meets the above criteria. Excluded employees who are appointed to permanent-intermittent positions are not eligible.

Rank-and-file employees are not eligible for this insurance program.

Employee Communications

For eligible employees NOT currently enrolled in the LTD Program: In late December 2004, the Department of Personnel Administration (DPA) will mail a notice of the upcoming open enrollment to approximately 30,000 eligible employees. The notice will include educational information from the plan's administrator, Standard Insurance Company (The Standard), about the need for LTD and announce the upcoming open enrollment period. In mid-January, these employees will also receive an enrollment packet with a detailed plan brochure, enrollment instructions, and an enrollment form. In mid-February, a final reminder postcard will be mailed to employees reminding them that the open enrollment period will end on March 4.

For eligible employees currently enrolled in the LTD program: In mid-January, the Department of Personnel Administration (DPA) will mail an open enrollment information packet to current enrollees. The packet will include a cover letter with detailed open enrollment information from The Standard on how to change LTD plans and an enrollment form. In mid-February, a final reminder post card will be mailed to employees reminding them that the open enrollment period will end on March 4.

The January issue of the "Benefits News," distributed by DPA to departmental personnel offices and employee organizations, will announce the open enrollment and provide program information. Please feel free to reproduce, distribute or post this newsletter on bulletin boards to notify your employees of the upcoming LTD open enrollment period.

There will also be a global message on the February 1, 2005 paycheck stub reminding employees of the LTD open enrollment.

Completion of the LTD Enrollment Authorization Form

During open enrollment, enrollees are required to complete Sections A, B, and C of the LTD enrollment authorization form (SI7533D-643146), and submit the form to their departmental personnel office.

When personnel officers receive the enrollment form, they are responsible for verifying that the information is completed correctly in Sections B and C, completing Section D, and submitting the enrollment form to the State Controller's Office (SCO) by the dates indicated below.

Effective Date of Coverage

Completed enrollment forms (processed through personnel offices) received at the State Controller's Office (SCO) by February 10th will provide coverage effective March 1, 2005. Forms received by the SCO from February 11th through March 10th will provide coverage effective April 1, 2005. LTD forms received by SCO after March 10, 2005 will be rejected. Appeals will be reviewed by DPA on a case-by-case basis.

LTD Plan Brochures, Enrollment Forms

To help minimize your workload during the LTD open enrollment, The Standard will be the primary contact for the distribution of plan information and enrollment forms. However, a small number of employees may contact you directly for LTD information and forms.

Please ensure that you have an adequate supply of brochures and forms. You may call The Standard at 1-888-641-7193 to order a supply of LTD forms (SI7533D-643146) and brochures (SI 10386-643146).

If employees have questions you cannot answer, please direct them to The Standard's dedicated Web site at: <http://www.standard.com/mybenefits/california> or the toll-free customer service line at 1-888-641-7193.

If you have questions about this memo, please contact Susan Wong at (916) 324-0533.

Since the last open enrollment for this plan was conducted in February 2003, we anticipate a great deal of interest from eligible employees. We appreciate your assistance with informing employees about the LTD plan and the open enrollment.

/s/ Debbie Endsley

Debbie Endsley, Chief
Benefits Division

cc: Standard Insurance Company
Cal Expo
Fairs Authority