


THE CALIFORNIA STATE UNIVERSITY
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Code: **TECHNICAL LETTER**
HR/Benefits 2003-35

To: Human Resources Directors
Benefits Managers
Payroll Managers

From: Cathy Robinson 
Assistant Vice Chancellor
Human Resources Administration

Subject: **Eligibility Criteria for CSU Benefit Plans**

The California State University (CSU) provides multiple benefit plans to eligible represented and unrepresented employees. To assist campuses in administration of CSU benefits plans, this memorandum provides the following information:

- I. General Benefits Eligibility Criteria
- II. Core Benefit Plans – Medical, Basic Dental and Vision
- III. Supplemental Benefit Plan – CSU Paid Life Insurance
- IV. Supplemental Benefit Plan – Long Term Disability
- V. Benefit Effective Dates
- VI. Monitoring Time Base (FTE)
- VII. Retirees
- VIII. Consecutive Q1 Appointments for AB 211 Appointments

On Tuesday, January 13, 2004, from 9:00 a.m. to 11:00 a.m., Human Resources Administration will conduct a teleconference to respond to any questions regarding benefits eligibility. Instructions on how to access the teleconference will be sent to the addressees of this Technical Letter through email.

Campuses also may refer to benefit Administrative Guides and Technical Letters, specifically HR/Benefits 2003-06, for additional information, as appropriate. Please note that a new Administrative Guide for Life Insurance, Vision, and Long Term Disability Insurance will be released in the near future.

(Next)

Distribution:

Vice Chancellor, Human Resources
CSU Presidents
Associate Vice Presidents/Deans of Faculty
Director, SOSS

The following Attachments are provided:

- Attachment A – Medical – Core Benefit
- Attachment B – Dental – Core Benefit
- Attachment C – Vision – Core Benefit
- Attachment D – Basic Life – Supplemental Benefit
- Attachment E – Long Term Disability (LTD) – Supplemental Benefit
- Attachment F – Excluded Classifications (ineligible for benefits)
- Attachment G – Multiple Position Examples

I. General Benefits Eligibility Criteria

For an employee to be eligible for benefits, he/she must be in a benefits eligible classification and must meet one of the following two enrollment criteria:

- **Regular appointment** – employee is appointed in a benefits eligible classification with a time base of at least half-time (0.5 Full Time Equivalent (FTE)) and with a length of appointment for at least six months and one day.
- **AB 211 appointment** – Lecturers and Coaches (R03) in class codes 0357, 0360, 0361, 0364, 0465, 0557, 0560, 0564, 2308, 2331, 2332, 2333, 2334, 2335, 2358, 2375, 2378, 2381, and 2384 who are appointed for at least six (6) weighted teaching units (i.e., 0.4 time base/FTE) for at least one semester or two consecutive quarters. AB 211 appointments include a lecturer or coach appointed to a 0.4 FTE for an Academic Year (AY) or a 0.5 FTE up to full-time lecturer or coach appointed for one semester or two consecutive quarters.

For purposes of determining benefits eligibility under AB 211 criteria, only AB 211 eligible classifications can be combined.

II. Core Benefit Plans – Medical, Basic Dental and Vision

Core Benefit Plans are defined as medical health insurance, basic dental, and vision plans and are available to all eligible employees based upon the following eligibility criteria:

- Appointment to a time base of at least half-time (0.5 FTE) for at least six months and one day (**regular eligibility**).
- Appointment for at least six (6) weighted teaching units (i.e., 0.4 time base/FTE) for at least one semester or two consecutive quarters (**AB 211 classifications only**).
- Sum FTE across employee groups to reach a 0.5 FTE (half-time) appointment in order to meet regular eligibility criteria (*cannot sum across employee groups to meet AB 211 criteria*).
- If an employee is appointed for less than half-time (or 0.4 FTE for AB 211 appointment) and length of appointment meets eligibility criteria, and time base is subsequently increased to half-time (or 0.4 FTE for AB 211 appointments), the employee is enrolled in Core Benefit Plans on a prospective basis.
- Basic Dental is considered the core benefit. To be eligible for an enhanced dental plan, an employee must be appointed with a time base of at least half-time (0.4 FTE for AB 211 appointments) in a CBID offering an enhanced dental plan. FTE may be summed to

- 0.5 in multiple CBIDs offering same level of enhanced plan. If FTE does not meet 0.5 in the same level of enhanced plan, the employee is to be enrolled in the lower level benefit.
- AB 211 appointments may not be summed across CBIDs (e.g., R03 and non R03 classifications) or non AB 211 lecturer and coach classifications.

III. Supplemental Benefit Plan – CSU-Paid Life Insurance - M98, M80, C99, E99 (Teaching Associates (TA)), CSEA, R03, R04, and R08

CSU-paid life insurance is a supplemental benefit plan for specific employee groups. The amount of insurance coverage is defined by CBID and separate deduction codes are provided for each employee group. Eligibility criteria follows:

- An eligible employee is enrolled in an eligible CBID Life Insurance plan if appointed at least half-time for at least six months and one day (at least 0.4 FTE for at least one semester or two consecutive quarters for AB 211 appointments).
- In order to be eligible, the employee must be appointed with a time base of at least half-time (0.4 FTE for AB 211 appointment) in the CBID eligible plan.
- An employee appointed in two half-time positions for at least six months and one day in two different CBIDs eligible for Life Insurance should be enrolled in the higher level plan.
- No summing of FTE across CBIDs* (or between regular faculty appointments and AB 211 appointments to satisfy AB 211 eligibility) is permitted in this supplemental benefit plan (e.g., 0.3 FTE in MPP position and 0.2 FTE in R04 position = 0.5 FTE but ineligible for a life insurance plan).
- Temporary reassignments, promotions, reclassifications, demotions, or any type of movement into a CBID with a Life Insurance plan must be for at least half-time (0.4 FTE for AB 211 appointments) and six months and one day (one semester or two consecutive quarters for AB 211 appointments); otherwise, enrollment is not permitted.
- If an employee in a CBID with a Life Insurance plan and who is enrolled in the plan is temporarily reassigned, demoted, promoted, reclassified, or moved through another type of transaction into another CBID with a Life Insurance plan and the length of the assignment is less than six months and one day, the employee is not enrolled in the new Life Insurance plan and loses coverage under the previous position effective with the date of the transaction. Eligibility for Life Insurance is tied to a qualifying appointment in the qualifying CBID for that coverage.
- If an employee is appointed for less than half-time in a CBID with a Life Insurance plan and meets length of appointment eligibility criteria and the time base is subsequently increased to half-time (0.4 FTE for AB 211 appointments), the employee is enrolled in the Life Insurance plan on a prospective basis.

*For purposes of benefits eligibility, CSEA Units R02, R05, R07, and R09 are combined as one eligible group.

IV. Supplemental Benefit Plan - Long Term Disability (LTD) Insurance – M98, M80, R01, R03, and R04

Long Term Disability Insurance is a supplemental benefit plan and is available for specific employee groups. The amount of insurance coverage is defined by the CBID, and separate deduction codes are provided for each employee group. Eligibility criteria follows:

- An employee is enrolled in an eligible CBID LTD plan if appointed with a time base of at least half-time for at least six months and one day (at least 0.4 FTE for at least one semester or two consecutive quarters for AB 211 appointments).
- In order to be eligible, the employee must be appointed with a time base of at least half-time (0.4 FTE for AB 211 appointment) in the CBID eligible plan.
- An employee appointed in two half-time positions in two different CBIDs is eligible for LTD insurance and should be enrolled in the broader CBID benefit plan (i.e., eligible for Life Insurance plan).
- No summing of FTE across CBIDs (or between regular faculty appointments and AB 211 appointments to satisfy AB 211 eligibility) is permitted for this supplemental benefit plan (0.3 FTE in MPP position and 0.2 FTE in R04 position = 0.5 FTE but ineligible for an LTD plan).
- Temporary reassignments, promotions, reclassifications, demotions, or any type of movement into a CBID with an LTD plan must be for at least half-time (0.4 FTE for AB 211 appointments) and for at least six months and one day; otherwise, enrollment is not permitted.
- If an employee in a CBID with an LTD plan is temporarily reassigned, demoted, promoted, reclassified, or moved through another type of transaction into another CBID with an LTD plan and the length of the assignment is less than six months and one day, the employee is not enrolled in the new CBID LTD plan and loses coverage under the previous position effective with the date of the transaction.
- If an employee is appointed for less than half-time and meets the length of appointment eligibility criteria and the time base is subsequently increased to half-time (0.4 FTE for AB 211 appointment), the employee is enrolled in the LTD plan on a prospective basis.

V. Benefits Effective Date

Eligible employees have sixty days from date of employment to select appropriate health and dental plans. The deductions for these two plans are considered prospective or “prepaid” in that the effective date of coverage is the first of the month after the deduction is taken and shows on the employee’s paycheck. CSU makes contributions towards employee health premiums; CSU currently pays the full premium for employee dental plans.

For employees in CBIDs with Life Insurance, Vision, and LTD plans, the CSU currently pays full premiums for these plans. Campuses are to enroll eligible employees in the pay period the appointment or eligibility occurs. Although deductions are taken in the same pay period, the effective date of coverage for these three plans differs as noted below:

- Vision – effective date of coverage is first of the month after deduction is taken (prospective).

- Basic Life – coverage is effective first day actively at work under provisions of the Basic Life contract; deduction must be effective consistent with the employee's first pay period.
- LTD – coverage is effective first day actively at work under provisions of the LTD contract; deduction must be effective consistent with the employee's first pay period.

VI. Monitoring Time Base (FTE)

Employees must maintain a time base of half time or more (0.4 FTE or more for AB 211 appointments) in qualifying positions in order to maintain benefits eligibility in their current enrolled plans. Once an employee is enrolled, the duration of subsequent appointments is immaterial as long as the appointments are consecutive with no break in service, FTE criteria are met, and there is no change in CBID. A change in an employee's CBID requires the need to review the employee's eligibility for supplemental benefit plans and possible change in the employee's dental plan level.

VII. Retirees

CalPERS administers health and dental benefits for retirees. Once an employee retires, the state pays the employer contribution for health benefits for a retiree eligible for these benefits. Benefits-eligible retirees are enrolled in the basic dental plan and premiums are currently paid by the CSU. Please note the following:

- FERP retirees are eligible for enhanced dental benefits and vision coverage during their FERP employment if appointed half-time or more. Once the FERP entitlement is completed, the retiree must be enrolled in the basic dental plan and offered the vision COBRA benefit.
- Upon retirement, CSU retirees may continue vision coverage through COBRA.
- If an employee decides to rescind his/her retirement, campuses need to ensure all government code references are removed from the employee's current appointment record so that benefits eligibility can be reestablished.
- State Teachers' Retirement System (STRS) retirees may have an active CSU position that is not retired. Employees in this situation are eligible for benefits and should be enrolled if eligibility criteria are met.

VIII. Consecutive Q1 Appointments for AB 211 Appointments

A single one-quarter appointment on its own does not qualify for benefits unless it follows a previously qualifying appointment (two quarters). If the intent of the campus is to appoint an employee for two consecutive quarters, the initial appointment needs to reflect this so benefits eligibility can be determined automatically and the employee's employment record reflects that eligibility.

Please contact Human Resources Administration at (562) 951-4411 if you have questions prior to the teleconference. This Technical Letter is also available via Human Resources Administration's Web page at: <http://www.calstate.edu/HRAdm/memos.shtml>.

CR/pc
Attachments

Medical – Core Benefit, Employee elects provider

- **Deduction Codes:**
 - See CalPERS Health Deduction Codes
- **Prepaid**
 - Staff and Non-AY Faculty example:
 1. August appointment effective date
 2. Deduction taken August pay period
 3. Coverage starts September pay period
 - AY example:
 1. August appointment effective date
 2. Deduction taken 1st pay period of AY calendar (September)
 3. Coverage starts October pay period
- **Coverage End Date**
 - One month after final deduction
 - Lump sum vacation payout upon separation does not count as time worked for benefits purposes.

Regular Eligibility Criteria

- **Employee Group**
 - Eligible: All represented and unrepresented employees.
 - Eligible: All active positions.
 - Eligible: Employee on a Family Medical Leave who was benefits eligible previously (processed manually through the SCO via form 674).
 - Ineligible: rehired annuitants, FERPS, hourly intermittents and employees in the classifications listed in Attachment F.
- **FTE Requirements (Time Base)**
 - Sum of FTE for all active positions in the CSU must be ≥ 0.5 ; or,
 - Employee is on a Pre-retirement Reduction in Time Base (PIMS field, Item 962 = 7552) and was benefits eligible previously (eligible faculty employees only).
- **Appointment duration - at least one position must qualify**
 - Permanent/probationary appointments (no appointment expiration date).
 - Employee on a Pre-retirement Reduction in Time Base who was benefits eligible previously.
 - Temporary appointment of at least 6 months and 1 day from appointment effective date to appointment expiration date.
 - Temporary appointment less than 6 months and 1 day continuous with no break in service between this appointment and previous benefits-eligible appointment.
 - A transaction such as a temporary promotion, reclassification, or reassignment for less than 6 months and 1 day given to a benefits eligible permanent/probationary employee.
 - Mid appointment increases to FTE and the original effective date of the appointment (not the effective date of the increase in FTE) and appointment expiration date is at least 6 months and 1 day (TL HR/Benefits 2003-06).

- Summer quarter classes where the intent is to appoint the employee to a qualifying permanent position in the fall quarter. Classes are 2389, 2390, 2402, 2395, 2367, 2394, 2368, and 2357. This is a campus manual process.

Multiple Positions

- Sum FTE for all CSU positions meeting the criteria under Employee Group.
- The appointment with the longest appointment expiration date is used to determine eligibility based on duration.

AB 211 Eligibility Criteria

- **Employee Group**
 - Eligible: Part-time lecturers and coaches in class codes 0357, 0360, 0361, 0364, 0365, 0557, 0560, 0564, 2308, 2331, 2332, 2333, 2334, 2335, 2358, 2375, 2378, 2381, and 2384 who do not meet the regular eligibility criteria.
 - Eligible: Employee on a Family Medical Leave who was benefits eligible previously (processed manually through the SCO via form 674).
- **FTE Requirements (Time Base)**
 - Sum of FTE for all qualifying positions in the CSU must be ≥ 0.4 (and up to 1.0)
- **Appointment duration - at least one position must qualify**
 - Minimum of one semester or two consecutive quarters.
 - Mid appointment increases to FTE and the original effective date of the appointment (not the effective date of the increase in FTE) and appointment expiration date is at the end of one semester, two consecutive quarters or the Academic Year (TL HR/Benefits 2003-06).

Multiple Positions

- Sum FTE for all CSU positions meeting the criteria under Employee Group.
- The appointment with the longest appointment expiration date is used to determine eligibility based on duration.

Dental – Core Benefit, CBID determines coverage level, employee elects provider

➤ **Deduction Codes:**

- 150-004 Delta Dental Basic
- 150-007 Delta Dental Enhanced Level II
- 150-012 PMI Deltacare Basic
- 150-013 PMI Deltacare Enhanced
- 150-181 Delta Dental Enhanced Level I

➤ **Prepaid**

- Staff and Non-AY Faculty example:
 1. August appointment effective date or enrollment form received
 2. Deduction taken August pay period
 3. Coverage starts September pay period
- AY example:
 1. August appointment effective date or enrollment form received
 2. Deduction taken 1st pay period of AY calendar (September)
 3. Coverage starts October pay period

➤ **Coverage End Date**

- One month after final deduction
- Lump sum vacation payout upon separation does not count as time worked for benefits purposes.

Regular Eligibility Criteria

● **Employee Group**

- Eligible: All represented and unrepresented employees.
- Eligible: All active positions.
- Eligible: Employee on a Family Medical Leave who was benefits eligible previously (processed manually through the SCO via form 674).
- Ineligible: rehired annuitants, FERPS (eligible for CSU-paid enhanced dental via retirement if appointment is 0.5 or more), hourly intermittents and employees in the classifications listed in Attachment F.

● **FTE Requirements (Time Base)**

- Sum of FTE for all active positions in the CSU must be ≥ 0.5 ; or,
- Employee is on a Pre-retirement Reduction in Time Base (PIMS field, Item 962 = 7552) and was benefits eligible previously (eligible faculty employees only).

● **Appointment duration - at least one position must qualify**

- Permanent/probationary appointments (no appointment expiration date).
- Employee on a Pre-retirement Reduction in Time Base who was benefits eligible previously.
- Temporary appointments of at least 6 months and 1 day from appointment effective date to appointment expiration date.
- Temporary appointment less than 6 months and 1 day continuous with no break in service between this appointment and previous benefits-eligible appointment.

- A temporary promotion, reclassification, reassignment, demotion, or movement via another transaction in the same CBID for less than 6 months and 1 day is given to a permanent/probationary employee who is benefits eligible. If such transaction is to a CBID with a lower level dental benefit, a change to the lower level dental benefit must be made on a prospective basis.
- Mid appointment increases to FTE and the original effective date of the appointment (not the effective date of the increase in FTE) and appointment expiration date is at least 6 months and 1 day (TL HR/Benefits 2003-06).
- Summer quarter classes where the intent is to appoint the employee to a qualifying permanent position in the fall quarter. Classes are 2389, 2390, 2402, 2395, 2367, 2394, 2368, and 2357. This is a campus manual process.

Multiple Positions

- Sum FTE for all CSU positions meeting the criteria under Employee Group. FTE may be summed to 0.5 in multiple employee groups offering same level of enhanced dental plan. If FTE does not meet 0.5 in same level of enhanced plan, the employee is to be enrolled in the lower level benefit.
- The appointment with the longest appointment expiration date is used to determine eligibility based on duration.

AB 211 Eligibility Criteria

- **Employee Group**
 - Eligible: Part-time lecturers and coaches in class codes 0357, 0360, 0361, 0364, 0365, 0557, 0560, 0564, 2308, 2331, 2332, 2333, 2334, 2335, 2358, 2375, 2378, 2381, and 2384 who do not meet the regular eligibility criteria.
 - Eligible: Employee on a Family Medical Leave who was benefits eligible previously (processed manually through the SCO via form 674).
- **FTE Requirements (Time Base)**
 - Sum of FTE for all qualifying positions in the CSU must be ≥ 0.4 (and up to 1.0).
- **Appointment duration - at least one position must qualify**
 - Minimum of one semester or two consecutive quarters.
 - Mid appointment increases to FTE and the original effective date of the appointment (not the effective date of the increase in FTE) and appointment expiration date is at the end of one semester, two consecutive quarters or the Academic Year (TL HR/Benefits 2003-06).

Multiple Positions

- Sum FTE for all CSU positions meeting the criteria under Employee Group.
- The appointment with the longest appointment expiration date is used to determine eligibility based on duration.

Vision – Core Benefit, no employee selection required

- **Deduction Codes:**
 - 450-997 (annual) FERPS, 0.4 to 0.49 grandfathered lecturers
 - 450-003 (monthly) all others
- **Prepaid**
 - Staff and Non-AY Faculty example:
 1. August appointment effective date
 2. Deduction taken August pay period
 3. Coverage starts September pay period
 - AY example:
 1. August appointment effective date
 2. Deduction taken 1st pay period of AY calendar (September)
 3. Coverage starts October pay period
- **Coverage End Date**
 - One month after final deduction
 1. August separation effective date
 2. Deduction last taken August pay period
 - Lump sum vacation payout upon separation does not count as time worked for benefits purposes.

Regular Eligibility Criteria

- **Employee Group**
 - Eligible: All represented and unrepresented employees.
 - Eligible: All active positions.
 - Eligible: Employee on a Family Medical Leave who was benefits eligible previously (processed manually through the SCO via form 674).
 - Ineligible: rehired annuitants, hourly intermittents and employees in the classifications listed in Attachment F.
- **FTE Requirements (Time Base)**
 - Sum of FTE for all active positions in the CSU must be ≥ 0.5 ; or,
 - Employee is on a Pre-retirement Reduction in Time Base (PIMS field, Item 962 = 7552) and was benefits eligible previously (eligible faculty employees only).
- **Appointment duration - at least one position must qualify**
 - Permanent/probationary appointments (no appointment expiration date).
 - FERPS, if appointed with an FTE of 0.5 or more (PIMS field, Item 962 = 7757).
 - Employee on a Pre-retirement Reduction in time base who was benefits eligible previously.
 - Temporary appointments of at least 6 months and 1 day from appointment effective date to appointment expiration date.
 - Temporary appointment less than 6 months and 1 day continuous with no break in service between this appointment and previous benefits-eligible appointment.

- A transaction such as a temporary promotion, reclassification, demotion, or reassignment for less than 6 months and 1 day given to a benefits eligible permanent/probationary employee.
- Mid appointment increases to FTE and the original effective date of the appointment (not the effective date of the increase in FTE) and appointment expiration date is at least 6 months and 1 day (TL HR/Benefits 2003-06).
- Summer quarter classes where the intent is to appoint the employee to a qualifying permanent position in the fall quarter. Classes are 2389, 2390, 2402, 2395, 2367, 2394, 2368, and 2357. This is a campus manual process.

Multiple Positions

- Sum FTE for all CSU positions meeting the criteria under Employee Group.
- The appointment with the longest appointment expiration date is used to determine eligibility based on duration.

AB 211 Eligibility Criteria

• Employee Group

- Eligible: Part-time lecturers and coaches in class codes 0357, 0360, 0361, 0364, 0365, 0557, 0560, 0564, 2308, 2331, 2332, 2333, 2334, 2335, 2358, 2375, 2378, 2381, and 2384 who do not meet the regular eligibility criteria.
- Eligible: Employee on a Family Medical Leave who was benefits eligible previously (processed manually through the SCO via form 674).

• FTE Requirements (Time Base)

- Sum of FTE for all qualifying positions in the CSU must be ≥ 0.4 (and up to 1.0).

• Appointment duration - at least one position must qualify

- Minimum of one semester or two consecutive quarters.
- Mid appointment increases to FTE and the original effective date of the appointment (not the effective date of the increase in FTE) and appointment expiration date is at the end of one semester, two consecutive quarters or the Academic Year (TL HR/Benefits 2003-06).

Multiple Positions:

- Sum FTE for all CSU positions meeting the criteria under Employee Group.
- The appointment with the longest appointment expiration date is used to determine eligibility based on duration.

Basic Life – Supplemental benefit - no employee selection required

➤ Deduction Codes:

250-020 - M80	250-021 - R03
250-022 - E99	250-023 - R08
250-024 - R04	250-025 - C99 & M80, M98 who waive > \$50,000
250-026 - M98	250-027 - R02, R05, R07, R09

➤ Prepaid

- Staff and Non-AY Faculty example:
 1. August appointment effective date
 2. Deduction taken August pay period
 3. Coverage starts date of appointment per Basic Life contract
- AY example:
 1. August appointment effective date
 2. Deduction taken 1st pay period of AY calendar (September)
 3. Coverage starts date of appointment per Basic Life contract

➤ Coverage End Date

- Close of business the day of separation. Due to payroll limitations, partial deductions for a month cannot be taken. Process as follows:
 1. August separation effective date
 2. Deduction last taken July pay period
- Lump sum vacation payout upon separation does not count as time worked for benefits purposes.

Regular Eligibility Criteria

• Employee Group

- Eligible: Positions in CBIDs M80, R04, M98, R03, R08, C99, R02, R05, R07, R09 (CSEA combined as one eligibility group), and E99 Teaching Associates only.
- Eligible: Active positions.
- Ineligible: rehired annuitants, FERPS, hourly intermittents and employees in the classifications listed in Attachment F for R03.

• FTE Requirements (Time Base)

- Sum of FTE for all active positions which qualify must be ≥ 0.5 ; or,
- Employee is on a Pre-retirement Reduction in Time Base (PIMS field, Item 962 = 7552) and was benefits eligible previously (eligible faculty employees only).

• Appointment duration - at least one position must qualify

- Permanent/probationary appointments (no appointment expiration date).
- Employee on a Pre-retirement Reduction in Time Base who was benefits eligible previously.
- Temporary appointments of at least 6 months and 1 day from appointment effective date to appointment expiration date.
- Temporary appointment less than 6 months and 1 day continuous with no break in service between this appointment and previous benefits eligible appointment.

- A temporary promotion, reclassification, reassignment in the same CBID for less than 6 months and 1 day given to a benefits eligible permanent/probationary employee.
- Mid appointment increases to FTE and the original effective date of the appointment (not the effective date of the increase in FTE) and appointment expiration date is at least 6 months and 1 day (TL HR/Benefits 2003-06).
- Summer quarter classes where the intent is to appoint the employee to a qualifying permanent position in the fall quarter. Classes are 2389, 2390, 2402, 2395, 2367, 2394, 2368, and 2357.

Multiple Positions

- Sum FTE for all CSU positions meeting the criteria under Employee Group.
- Eligibility for each plan (denoted by deduction code) is considered separately.
- The permanent/probationary appointment(s) or the one with the longest appointment expiration date is used to determine eligibility based on duration.
- Enrollment priority if two qualifying positions:
 1. Highest FTE
 2. M98
 3. M80
 4. R03
 5. C99
 6. E99 (Teaching Associates)
 7. R04
 8. R08
 9. R02, R05, R07, R09

AB 211 Eligibility Criteria

- **Employee Group**
 - Eligible: Part-time lecturers and coaches in class codes 0357, 0360, 0361, 0364, 0365, 0557, 0560, 0564, 2308, 2331, 2332, 2333, 2334, 2335, 2358, 2375, 2378, 2381, and 2384 who do not meet the regular eligibility criteria.
- **FTE Requirements (Time Base)**
 - Sum of FTE for all qualifying positions in the CSU must be ≥ 0.4 (and up to 1.0).
- **Appointment duration - at least one position must qualify**
 - Minimum of one semester or two consecutive quarters.
 - Mid appointment increases to FTE and the original effective date of the appointment (not the effective date of the increase in FTE) and appointment expiration date is at the end of one semester, two consecutive quarters or the Academic Year (TL HR/Benefits 2003-06).

Multiple Positions:

- Sum FTE for all CSU positions meeting the criteria under Employee Group (CBID).
- The appointment with the longest appointment expiration date is used to determine eligibility based on duration.

Long Term Disability (LTD) – Supplemental benefit - no employee selection required

➤ **Deduction Codes:**

- 250-100 - M80
- 250-101 - R03
- 250-102 - R04
- 250-103 - R01
- 250-104 - M98

➤ **Post paid**

- Staff and Non-AY Faculty example:
 1. August appointment effective date
 2. Deduction taken August pay period
 3. Coverage starts August pay period
- AY example:
 1. August appointment effective date
 2. Deduction taken 1st pay period of AY calendar (September)
 3. Coverage starts September pay period (covering August and September)

➤ **Coverage End Date**

- Close of business the day of separation. Due to payroll limitations, partial deductions for a month cannot be taken. Process as follows:
- Through the month of separation
 1. August separation effective date
 2. Deduction last taken August pay period
- Lump sum vacation payout upon separation does not count as time worked for benefits purposes.

Regular Eligibility Criteria

• **Employee Group**

- Eligible: Positions in CBIDs M80, R03, R04, R01, and M98.
- Eligible: Active positions.
- Ineligible: rehired annuitants, FERPS, hourly intermittents and employees in the classifications listed in Attachment F under R03.

• **FTE Requirements (Time Base)**

- Sum of FTE for all active positions in the CSU must be ≥ 0.5 ; or,
- Employee is on a Pre-retirement Reduction in Time Base (PIMS field, Item 962 = 7552) and was benefits eligible previously (eligible faculty employees only).

- **Appointment duration - at least one position must qualify**
 - Permanent/probationary appointments (no appointment expiration date)
 - Employee on a Pre-retirement Reduction in Time Base who was benefits eligible previously
 - Temporary appointments of at least 6 months and 1 day from appointment effective date to appointment expiration date.
 - Temporary appointment less than 6 months and 1 day continuous with no break in service between this appointment and previous benefits-eligible appointment.
 - A transaction such as a temporary promotion, reclassification, or reassignment in the same CBID for less than 6 months and 1 day given to a benefits eligible permanent/probationary employee.
 - Mid appointment increases to FTE and the original effective date of the appointment (not the effective date of the increase in FTE) and appointment expiration date is 6 months and 1 day (TL HR/Benefits 2003-06).
 - Summer quarter classes where the intent is to appoint the employee to a qualifying permanent position in the fall quarter. Classes are 2389, 2390, 2402, 2395, 2367, 2394, 2368, and 2357. This is a campus manual process.

Multiple Positions:

- Sum FTE for all CSU positions meeting the criteria under Employee Group.
- Eligibility for each plan (denoted by deduction code) is considered separately.
- The permanent/probationary appointment(s) or the one with the longest appointment expiration date is used to determine eligibility based on duration.
- Enrollment priority if two qualifying positions:
 1. Highest FTE
 2. M98
 3. M80
 4. R03
 5. R04
 6. R01

AB 211 Eligibility Criteria

- **Employee Group**
 - Eligible: Part-time lecturers and coaches in class codes 0357, 0360, 0361, 0364, 0365, 0557, 0560, 0564, 2308, 2331, 2332, 2333, 2334, 2335, 2358, 2375, 2378, 2381, and 2384 who do not meet the regular eligibility criteria.
- **FTE Requirements (Time Base)**
 - Sum of FTE for all qualifying positions in the CSU must be ≥ 0.4 (and up to 1.0).
- **Appointment duration - at least one position must qualify**
 - Minimum of one semester or two consecutive quarters.
 - Mid appointment increases to FTE and the original effective date of the appointment (not the effective date of the increase in FTE) and appointment expiration date is the end of one semester, two consecutive quarters or the Academic Year (TL HR/Benefits 2003-06).

Multiple Positions:

- Sum FTE for all CSU positions meeting the criteria under Employee Group.
- The appointment with the longest appointment expiration date is used to determine eligibility based on duration.

Classifications Excluded from Benefits

E99

0051 – NON-EMPLOYEE TRACKING CODE

0100 - YOUTH SUMMER AID

1800 - CASUAL WORKER

1869 - RESIDENT ASSISTANT

1870 - STUDENT ASSISTANT

1871 - STUDENT TRAINEE, ON-CAMPUS WORK STUDY

1872 - STUDENT TRAINEE, OFF-CAMPUS WORK STUDY

1874 - BRIDGE STUDENT ASSISTANT

1875 - BRIDGE STUDENT TRAINEE, ON-CAMPUS WORK STUDY

1876 - BRIDGE STUDENT TRAINEE, OFF-CAMPUS WORK STUDY

2325 - GRADUATE ASSISTANT MONTHLY

2336 - EXCLUDED 403B DEDUCTION MONTHLY

2355 - GRADUATE ASSISTANT

2363 - INSTRUCTIONAL FACULTY, EXTENSION NON-CREDIT

4660 - SPECIAL CONSULTANT

6213 - SKILLED LABORER, CASUAL EMPLOYMENT

6225 - SUPERVISING LABORER, CASUAL EMPLOYMENT

6226 - LABORER, BUILDING TRADES, CASUAL EMPLOYMENT

6463 - SUPERVISING TILE LAYER, CASUAL EMPLOYMENT

6464 - TILE LAYER, CASUAL EMPLOYMENT

6468 - SUPERVISING FLOOR COVERING INSTALLER, CASUAL EMPLOYMENT

6469 - FLOOR COVERING INSTALLER, CASUAL EMPLOYMENT

6478 - SUPERVISING CARPENTER, CASUAL EMPLOYMENT

6479 - CARPENTER, CASUAL EMPLOYMENT

6480 - CARPENTER APPRENTICE, CASUAL EMPLOYMENT

6481 - SUPERVISING ROOFER, CASUAL EMPLOYMENT

6482 - ROOFER, CASUAL EMPLOYMENT

6500 - ASBESTOS WORKER, CASUAL EMPLOYMENT

6523 - PAINTER APPRENTICE, CASUAL EMPLOYMENT

6528 - SUPERVISING PAINTER, CASUAL EMPLOYMENT

6529 - PAINTER, CASUAL EMPLOYMENT

6531 - SUPERVISING ELECTRICIAN, CASUAL EMPLOYMENT

6535 - ELECTRICIAN, CASUAL EMPLOYMENT

6537 - ELECTRICIAN APPRENTICE, CASUAL EMPLOYMENT

6551 - SUPERVISING PLUMBER, CASUAL EMPLOYMENT

6552 - PLUMBER, CASUAL EMPLOYMENT

6553 - PLUMBER APPRENTICE, CASUAL EMPLOYMENT

6554 - SUPERVISING STEAMFITTER, CASUAL EMPLOYMENT

6555 - STEAMFITTER, CASUAL EMPLOYMENT

6558 - SUPVNG IRRIGATION&LAWN SPRINKLER PIPEFITTER, CASUAL EMPLOYMENT

6559 - IRRIGATION AND LAWN SPRINKLER PIPEFITTER, CASUAL EMPLOYMENT

6577 - BLACKSMITH, CASUAL EMPLOYMENT

6581 - SUPERVISING SHEET METAL WORKER, CASUAL EMPLOYMENT

6582 - SHEET METAL WORKER, CASUAL EMPLOYMENT

6611 - SUPERVISING PLASTERER, CASUAL EMPLOYMENT

6612 - PLASTERER, CASUAL EMPLOYMENT

6617 - SUPERVISING MASON, CASUAL EMPLOYMENT

E99 – Cont.

6618 - MASON, CASUAL EMPLOYMENT
6622 - SUPERVISING HOD CARRIER, CASUAL EMPLOYMENT
6623 - HOD CARRIER, CASUAL EMPLOYMENT
6632 - SUPERVISING CEMENT FINISHER, CASUAL EMPLOYMENT
6633 - CEMENT FINISHER, CASUAL EMPLOYMENT
8347 - POLICE OFFICER INTERMITTENT-NONREPRESENTED

R02

7930 - PER DIEM NON-EXEMPT - HEALTHCARE
7940 - PER DIEM EXEMPT - HEALTHCARE

R03

2337 - FACULTY UNIT 403B DEDUCTION MONTHLY
2356 - SUBSTITUTE INSTRUCTIONAL FACULTY
2362 - DEMONSTRATION INSTRUCTIONAL FACULTY
2365 - MUSIC STUDIO INSTRUCTIONAL FACULTY

Multiple Position Examples

Regular Eligibility Rules

Example 1 – Core Benefits (medical, dental, and vision)

Employee is eligible for benefits at the time of the initial appointment because the sum of FTE is 0.5 and Position One has a duration of one (1) year. If the campus separates the employee from Position Two on 12/1/2003, benefits are cancelled because FTE will drop to .25.

Position	Effective Date	Tran Code	CBID	FTE	Duration of Appt.
1	5/1/2002	A52	CSEA	.25	4/30/2003
2	5/1/2002	A52	CSEA	.25	12/1/2003

Example 2 - All benefits

Employee is in two temporary positions each with a FTE of .25, which when summed together meets the FTE requirement. The employee then goes on leave in one position reducing the overall FTE to .25. The employee is no longer benefits eligible. In the case of an employee with one position going on leave, benefits eligibility is a moot point because no pay is generated. The deductions cease and the employee should be offered direct pay options. When the employee returns, continued eligibility should be re-evaluated.

Example 3 - Basic Life Insurance

Employee is not eligible because concurrent appointment in R06 is not eligible for Basic Life. Employee must have a 0.5 FTE appointment in a CBID Life Insurance plan to be eligible.

Position	Effective Date	Tran Code	CBID	FTE	Duration of Appt.
1	8/1/2003	A52	R03	.25	7/31/2004
2	8/1/2003	A52	R06	.25	7/31/2004

AB 211 Eligibility Rules

Example 1 – All Benefit Plans

Employee is eligible for all benefit plans at the time of the initial appointment because the sum of FTE is 0.4 and Position Two has a duration of two (2) quarters. If the campus separates the employee from Position One at the end of the quarter, benefits are cancelled because FTE will drop to 0.2. If the campus appoints the employee to another consecutive Q1 appointment and FTE remains at 0.4 or greater in all positions, then benefits should continue.

Position	Effective Date	Tran Code	Class	FTE	Duration of Appt.
1	8/23/2003	A52	2358	.2	Q1
2	8/23/2003	A52	2358	.2	Q2