Disability Checklist

TO ENSURE YOUR DISABILITY LEAVE PROCEEDS AS SMOOTHLY AS POSSIBLE, PLEASE FOLLOW THESE STEPS AS YOU REVIEW THE FORMS WITHIN THE DISABILITY PACKET

1. NOTIFY YOUR SUPERVISOR – You are responsible for notifying your Supervisor about the length of time you expect to be disabled and request approval for a leave of absence. You should also request information from your Supervisor regarding the Family Medical Leave Act (FMLA)/ California Family Rights Act (CFRA) and if applicable obtain appropriate letters and forms from your department.

2. TO REPORT YOUR DISABILITY CLAIM ONLINE – Log on to the Lincoln Financial Group secure website at [www.mylibertyconnection.com](http://www.mylibertyconnection.com) refer to the Lincoln Financial Group instruction sheet in this packet titled “Reporting Your Disability Claim Online” for more instructions.

3. IF YOU DO NOT HAVE COMPUTER ACCESS, COMPLETE THE LINCOLN FINANCIAL GROUP PAPER DISABILITY CLAIM FORMS – The Employee Disability Claim form (Blue) is to be completed by you and sent/faxed to Lincoln Financial Group. Attending Physician’s Statement form (Yellow) is to be completed by your doctor and sent/faxed to Lincoln Financial Group.

   Once you have filed your claim with Lincoln Financial Group, the University will need to provide information to them as well, in order to process your claim. The Workers’ Compensation & Disability Management (WC/DM) Unit will ask for a completed Department Disability Claim Statement from your Department Administrator (it may be obtained from our disability website.) If possible, work with your Supervisor/Dept Administrator before your leave of absence and complete the Department Disability Claim Statement or contact one of the WC/DM consultants OR by FAX: (949) 824-9299. **This form indicates last day worked, sick day usage, vacation day usage, etc. The sooner this form can be completed, the faster your claim can be processed; however, it should not be completed more than 30 days prior to your last day of work.**

4. IF YOUR HIRE DATE IS LESS THAN 18 MONTHS FROM YOUR DATE OF DISABILITY – YOU WILL NEED TO FILE FOR STATE DISABILITY INSURANCE (SDI) BENEFITS TOO, because you must file for SDI in addition to your Lincoln Financial Group claim. SDI forms can be obtained at your doctor’s office, or via the Employment Development Department (EDD) website. Lincoln Financial Group requires a copy of the SDI claim response you will get from EDD before they can pay any benefits. If you are awarded SDI benefits, Lincoln Financial Group disability income will be adjusted accordingly.

5. MAKE SURE YOUR HEALTH and OTHER INSURANCE COVERAGE CONTINUES – When the WC/DM Unit is notified by Lincoln Financial Group that you have filed a disability claim AND we have received the Department Claim Statement from your department, we will prepare health insurance continuation information and send you a health insurance continuation bill, with instructions, so that you may pay your health and other insurance benefits. If you wish to cancel any of your selected insurance plans during your disability leave, you may do so on the health insurance continuation bill. To re-enroll in any insurances cancelled while on leave, complete a UPAY 850 form and send to the WC/DM office in Human Resources at 111 Theory, Suite 200, Irvine, CA 92697-4600; or Zot 4600, within 31 days of your return to work.

   For Pet Insurance continuation please review the Pet Insurance Continuation of Coverage Letter or call Nationwide at 855-672-7093.

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6. IF YOU ARE ENROLLED IN Health FSA – If you are currently enrolled in the Health Flexible Spending Account (Health FSA) and you go on leave without pay, your contributions to Health FSA stop. While on leave, you may continue to submit claims for eligible expenses incurred before the leave. Expenses incurred during the leave are generally not eligible expenses unless your leave is designated as FMLA. If so, you may choose to continue participation during your leave by retaining receipts for any paid co-pays or medical bills; eligible expenses incurred during your leave would be reimbursable after you return to work and then submitted to WageWorks. Before your leave begins, you must complete a UPAY 850 form and forward to the WC/DM office in Human Resources at 111 Theory, Suite 200, Irvine, CA 92697-4600; or Zot 4600. Contact the WC/DM Unit for details.

7. ENROLL YOUR NEW DEPENDENT – In order to add your new dependent onto your health insurance, you must complete a UPAY 850 form. This step must be done within 31 days of your child’s birth or adoption and must be forwarded to the WC/DM office in Human Resources at 111 Theory, Suite 200, Irvine, CA 92697-4600; or Zot 4600.

8. IF YOU ARE ALREADY ENROLLED IN DEPCARE – the Dependent Care Reimbursement Account (DepCare) which is also a Flexible Spending Account (FSA) will automatically be suspended during leave of absence. Any expenses incurred during your leave of absence are not eligible for reimbursement.

9. ENROLL IN DEP CARE (IF APPLICABLE) – The Dependent Care Assistance Program allows you to pay for eligible dependent care on a pretax, salary reduction basis. The program is established under Internal Revenue Code (IRC) 129. Contact your WC/DM consultant for more information. You may enroll by completing a UPAY 850 form and forwarding it to the WC/DM office in Human Resources at 111 Theory, Suite 200, Irvine, CA 92697-4600; or Zot 4600.

10. IF YOU HAVE AN OUTSTANDING LOAN (403(B)) – If you have an outstanding loan and are on “leave without pay” you must do one of the following within 90 days of your last day “on pay” status:
   - Arrange to make monthly cash payments directly to Fidelity at 1-866-682-7787.
   - Make payment in advance for the period you will be on a “leave without pay” status.
   - Repay the outstanding amount in full.

   If you do not do one of the above, your outstanding loan will be reported as a distribution and will be subject to taxes and penalties.

11. EMPLOYEE ASSISTANCE PROGRAM (EAP) – ComPsych Guidance Resources provides support, resources and information for personal and work-life issues. EAP is a no-cost, confidential assistance program to help address the personal issues faced by UCI faculty, staff and dependents at both the Campus and Medical Center. This service, staffed by experienced clinicians, is available by phone 24 hours a day, seven days a week. Call: 844.UCI.EAP (844-824-3273) or go online: guidanceresources.com (UCI’s code: UCIEAP3).

12. IF YOU NEED TO EXTEND YOUR LEAVE OF ABSENCE – Notify your Supervisor/Dept Administrator, the WC/DM Unit and Lincoln Financial Group. Your attending physician must provide written documentation to Lincoln Financial Group in order to extend your leave of absence. It is your responsibility to provide your Supervisor/Dept Administrator with a timely written note from your attending physician, stating the duration of the extension.

The Genetic Information Nondiscrimination Act of 2008 (GINA) prohibits employers and other entities covered by GINA Title II from requesting or requiring genetic information of an individual or family member of the individual, except as specifically allowed by this law. To comply with this law, we are asking that you not provide any genetic information when responding to this request for medical information. ‘Genetic information,’ as defined by GINA, includes an individual’s family medical history, the results of an individual’s or family member’s genetic tests, the fact that an individual or an individual’s family member sought or received genetic services, and genetic information of a fetus carried by an individual or an individual’s family member or an embryo lawfully held by an individual or family member receiving assistive reproductive services.

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