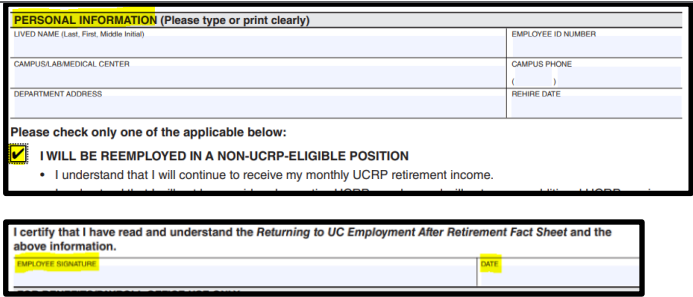
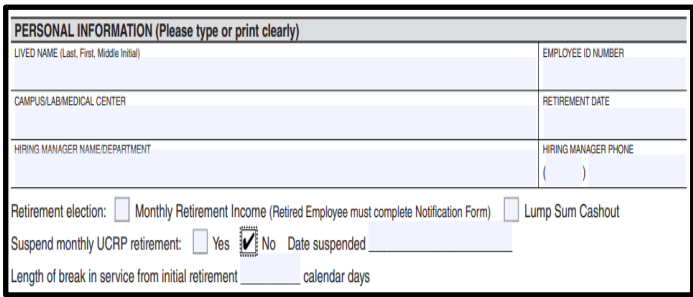
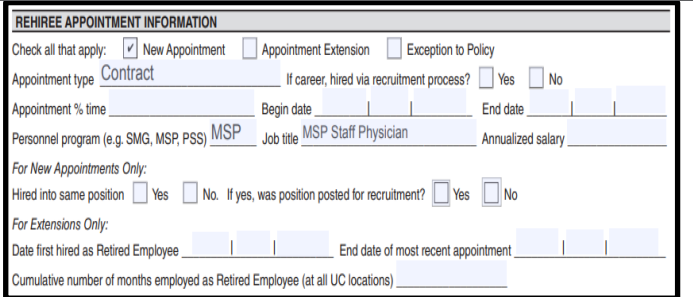


# Department Guide: How to initiate and secure approvals for an MSP Rehire Retiree (RTAD)

STEP	TASK DESCRIPTION	References Examples/screenshots/resources
	<p><b>Process Summary</b></p> <ol style="list-style-type: none"> <li>1. Collect completed <a href="#">UCRP Reemployed Retiree Notification Form</a> (form not needed if employee elected a retirement Lump Sum Cashout)</li> <li>2. Complete <a href="#">Retired Employee Approvals Form</a> and secure Department Chair signature</li> <li>3. Submit Case to HHR requesting RTAD and attaching above documents</li> <li>4. Once RTAD is approved, submit Case to ARC requesting MSP Contract and attach RTAD approval</li> </ol>	<p><b>UC Policy:</b> <a href="#">Reemployment of UC Retired Employees into Senior Management and Staff Position Policy</a></p> <p><b>Systemwide:</b> <a href="#">Returning Retiree Implementing Procedures</a></p> <p><b>Systemwide:</b> <a href="#">Reemployment of UC Retired Employees Into Senior Management Group and Staff Positions FAQs</a></p> <p><b>Retirement Election:</b> <a href="#">UCRP Reemployed Retiree Notification Form (UBEN 1039)</a></p> <p><b>Approvals Form:</b> <a href="#">Retired Employee Approvals Form (UBEN 138)</a></p> <p><b>UCNet:</b> <a href="#">Guidelines for Rehire of UC Retirees</a></p>
1.	<p>Complete and secure employee signature on <a href="#">UCRP Reemployed Retiree Notification Form</a></p> <p><b>Note:</b> Regarding Retirement Election – At the time of retirement, employees may elect a Monthly Retirement Income (MRI) or a Lump Sum Cashout (LSC/LSP). This form is not required if the Retiree elected a lump sum cashout (LSC/LSP).</p>	 <p>The screenshot shows the 'PERSONAL INFORMATION' section of the UCRP Reemployed Retiree Notification Form. It includes fields for LIVED NAME, EMPLOYEE ID NUMBER, CAMPUS/LAB/MEDICAL CENTER, CAMPUS PHONE, DEPARTMENT ADDRESS, and REHIRE DATE. Below these fields, there is a section for rehire election: 'Please check only one of the applicable below:' with a checked box for 'I WILL BE REEMPLOYED IN A NON-UCRP-ELIGIBLE POSITION' and a sub-point: 'I understand that I will continue to receive my monthly UCRP retirement income.' There is also a signature line for the employee.</p>
2a.	<p>Complete the <a href="#">Retired Employee Approvals Form</a></p> <p><b>'PERSONAL INFORMATION' section:</b></p> <ul style="list-style-type: none"> <li>• Lived Name of the Retired Employee</li> <li>• Employee ID Number</li> <li>• Campus/Lab/Medical Center - <b>UCSD - Health Science Professional Schools, School of Pharmacy or School of Public Health</b></li> <li>• Retirement Date</li> <li>• Hiring Manager/Department - <b>Department of _____</b></li> <li>• Hiring Manager Phone - <b>Supervisor UCSD Phone #</b></li> <li>• Retirement Election</li> <li>• Suspend monthly UCRP retirement – Select “<b>No</b>” unless the employee will be suspending their retirement and returning as an MSP at an effort greater than 43%</li> <li>• Length of break in service from initial retirement ____ calendar days</li> </ul>	 <p>The screenshot shows the 'PERSONAL INFORMATION' section of the Retired Employee Approvals Form. It includes fields for LIVED NAME, EMPLOYEE ID NUMBER, CAMPUS/LAB/MEDICAL CENTER, RETIREMENT DATE, HIRING MANAGER NAME/DEPARTMENT, and HIRING MANAGER PHONE. Below these fields, there are checkboxes for 'Retirement election' (Monthly Retirement Income or Lump Sum Cashout) and 'Suspend monthly UCRP retirement' (Yes or No). There is also a field for 'Length of break in service from initial retirement' in calendar days.</p>
2b.	<p><b>'REHIRE APPOINTMENT INFORMATION' section:</b></p> <ul style="list-style-type: none"> <li>• Check all that apply: <ul style="list-style-type: none"> <li>○ New Appointment – <i>Check if this is the first RTAD MSP appointment</i></li> <li>○ Appointment Extension – <i>Check if this is an RTAD MSP renewal</i></li> <li>○ Exception to policy - <i>this box should be checked if the MSP Renewal request is beyond the 24-month mark. (Refer to <a href="#">Implementing Procedures</a> for additional exceptions to policy)</i></li> </ul> </li> <li>• Appointment type - <b>Contract</b></li> <li>• Appointment % time and Begin/End Dates: <i>All rehired retirees are limited to working a maximum of 43% within a 12-month period. Refer to the policy and FAQs for further effort and time limit examples.</i></li> </ul>	 <p>The screenshot shows the 'REHIRE APPOINTMENT INFORMATION' section of the Retired Employee Approvals Form. It includes a section for 'Check all that apply:' with checkboxes for 'New Appointment', 'Appointment Extension', and 'Exception to Policy'. Below this, there are fields for 'Appointment type' (Contract), 'Appointment % time', 'Begin date', 'End date', 'Personnel program' (MSP), and 'Job title' (MSP Staff Physician). There are also sections for 'For New Appointments Only' and 'For Extensions Only' with checkboxes and date fields.</p>

	<ul style="list-style-type: none"> <li>Annualized salary: <i>The salary should be indicated the Base + Non-Base pay at 100% effort and not at the prorated amount.</i></li> <li>For New Appointments Only: <ul style="list-style-type: none"> <li>Hire into same position: <i>Select "Yes" if employee was an MSP at time of retirement and select "No" on recruitment question. Select "No" if employee held a Faculty appointment at time of retirement.</i></li> </ul> </li> <li>For Extensions Only: <i>populate MSP contract dates requested</i></li> <li>Cumulative number of months employed as a Retired Employee (at all UC locations): <i>The number of months should reflect the number already employed as a Retired Employee and does not include the number of months for the current request.</i></li> </ul>	<p><a href="#">Reemployment of UC Retired Employees into Senior Management and Staff Position Policy</a></p> <p><a href="#">Implementing Procedures</a></p> <p><a href="#">Reemployment of UC Retired Employees Into Senior Management Group and Staff Positions FAQs</a></p>																								
2c.	<p>Complete the <b>'REHIRE APPOINTMENT INFORMATION'</b></p> <ul style="list-style-type: none"> <li>Please describe the University need and Justification for an Exception to Policy: These sections should always include (even when it is not an exception) information related to: <ul style="list-style-type: none"> <li><b>University Need (Unique/High-Level Skill)</b> that provides a detailed explanation of the retiree's unique/high-level skill and why it is needed. For example, questions to answer may include: <ul style="list-style-type: none"> <li>What high-level skills are required by someone fulfilling this position?</li> <li>Why can't someone who is not a returning retiree fulfill the duties of this position?</li> <li>What efforts, if any, have been made to fill the position with someone who is not a returning retiree?</li> </ul> </li> <li><b>Justification (Succession Plan)</b> that provides a detailed 12-month succession plan for the period of time that the retiree will be employed, as retiree employees are not intended to be permanent staffing solutions. For example: <ul style="list-style-type: none"> <li>Indicate any recruitment plans within the 12-month period, if a recruitment is posted, or any actions to establish a permanent replacement.</li> <li>What is the timeline for the retiree to train their replacement?</li> <li>Details regarding the transition of work. For example, reorganizing the organization to absorb the duties of the returning retiree elsewhere, or not performing the duties, etc.</li> </ul> </li> </ul> </li> </ul>	<div style="border: 1px solid black; padding: 5px;"> <p>Please describe University need (attach additional pages if necessary)</p> <hr/> <p>Justification for an Exception to Policy (attach additional pages if necessary)</p> </div>																								
2d.	<p><b>'SIGNATURES' section"</b></p> <ul style="list-style-type: none"> <li>Please secure Department Chair signature on completed documents</li> </ul>	<div style="border: 1px solid black; padding: 5px;"> <p><b>SIGNATURES</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2">DEPARTMENT HEAD AUTHORIZED SIGNATURE</td> <td colspan="2">DEAN/DIRECTOR/PRINCIPAL OFFICER AUTHORIZED SIGNATURE</td> </tr> <tr> <td>NAME (please print)</td> <td>PHONE ( )</td> <td>NAME (please print)</td> <td>PHONE ( )</td> </tr> <tr> <td>DATE</td> <td></td> <td>DATE</td> <td></td> </tr> <tr> <td colspan="2">CHIEF HUMAN RESOURCES OFFICER AUTHORIZED SIGNATURE</td> <td colspan="2">EXECUTIVE OFFICER AUTHORIZED SIGNATURE</td> </tr> <tr> <td>NAME (please print)</td> <td>PHONE ( )</td> <td>NAME (please print)</td> <td>PHONE ( )</td> </tr> <tr> <td>DATE</td> <td></td> <td>DATE</td> <td></td> </tr> </table> </div>	DEPARTMENT HEAD AUTHORIZED SIGNATURE		DEAN/DIRECTOR/PRINCIPAL OFFICER AUTHORIZED SIGNATURE		NAME (please print)	PHONE ( )	NAME (please print)	PHONE ( )	DATE		DATE		CHIEF HUMAN RESOURCES OFFICER AUTHORIZED SIGNATURE		EXECUTIVE OFFICER AUTHORIZED SIGNATURE		NAME (please print)	PHONE ( )	NAME (please print)	PHONE ( )	DATE		DATE	
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3.	<p><b>Submit Case to Health HR</b></p> <ul style="list-style-type: none"> <li>Complete a <a href="#">General Inquiry Health HR Request</a> as this RTAD request does not follow a typical process for a staff hire. <ul style="list-style-type: none"> <li>Requestor: <i>Department Contact</i></li> <li>Team Member: <i>Proposed RTAD MSP Employee</i></li> <li>How can we help: <i>Notate that this is a RTAD request for an MSP and upon approval, you will be submitting the MSP Contract request to ARC</i></li> <li>Attach completed: <ul style="list-style-type: none"> <li><b>Rehired Employee Approvals form</b> with Department Chair signature</li> <li><b>UCPC Rehired Retiree Election Form</b> (if applicable) with employee signature</li> </ul> </li> </ul> </li> <li>Submit case</li> <li>Respond to follow up questions from HHR in a timely manner</li> <li>If approved, requestor will receive the Rehired Employee Approval Form with CHRO and VC signature approvals</li> </ul>	<div style="border: 1px solid black; padding: 5px;"> <p>Contact Health HR</p> <p>Not sure where to go? Get help here.</p> <table style="width: 100%;"> <tr> <td><b>Call Health Human Resources:</b> 619-543-3200</td> <td><b>Mailing Address:</b> 200 West Arbor Drive #8912, San Diego, CA, 92103-8912</td> <td><b>Physical Location:</b> 6333 Greenwich Dr Suite 200 San Diego, CA 92122</td> </tr> </table> <p>*Requester ⓘ Primary contact for updates to this case <input type="text"/></p> <p>Team Member ⓘ Person to whom this request refers, if different from Requester <input type="text"/></p> <p>*How can we help? <input type="text"/></p> </div>	<b>Call Health Human Resources:</b> 619-543-3200	<b>Mailing Address:</b> 200 West Arbor Drive #8912, San Diego, CA, 92103-8912	<b>Physical Location:</b> 6333 Greenwich Dr Suite 200 San Diego, CA 92122																					
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		<div style="border: 1px solid black; padding: 5px;"> <span style="background-color: yellow; border: 1px solid black; padding: 2px 5px;">Submit</span> <span style="float: right; border: 1px solid black; padding: 2px 5px;"> Add attachments</span> </div>
4.	<p><b>Submit Case to ARC to initiate MSP Contract</b> once all approvals have been received by HHR</p> <ul style="list-style-type: none"> <li>• Complete the <a href="#">ARC MSP Contract Form</a> detailing the new/renewal MSP appointment nuances <ul style="list-style-type: none"> <li>○ Important RTAD specific questions: <ul style="list-style-type: none"> <li>▪ Has the candidate ever held an appointment at any UC campus? - <b>Yes</b></li> <li>▪ Has the candidate held an appointment specifically at UCSD? - <b>Yes</b></li> <li>▪ Candidate Name – Select <b>Employee’s name</b></li> <li>▪ Is the candidate currently retired or planning to retire from a UC campus (RTAD)? – <b>Yes</b></li> <li>▪ Have you obtained RTAD approval from HHR? – <b>Yes</b></li> </ul> </li> <li>○ Attach all necessary documents <ul style="list-style-type: none"> <li>▪ Fully Signed Rehired Employee Approvals Form</li> <li>▪ UCRP Rehired Retiree Election Form (if applicable)</li> <li>▪ If this is the first MSP RTAD request for this employee: <ul style="list-style-type: none"> <li>• MSP Job Description</li> <li>• CV</li> <li>• ECC approval (as applicable)</li> </ul> </li> </ul> </li> </ul> </li> <li>• Submit Case</li> <li>• Respond to follow up questions from ARC in a timely manner</li> </ul>	<div style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;">Candidate Information</p> <p>Requestor 0 [dropdown]</p> <p>* Has the candidate ever held an appointment at any UC campus? Yes [dropdown]</p> <p>* Has the candidate held an appointment specifically at UCSD? Yes [dropdown]</p> <p>* Candidate's Name (first name, last name) x 0 [dropdown]</p> <p>* Have you obtained RTAD approval from HHR?  Required for retired/retiring candidates. HHR approval must be obtained before proceeding with MSP. x Yes [dropdown]</p> <p>* Is the candidate currently retired or planning to retire from a UC campus (RTAD)?  Please confirm this information directly with the candidate before responding. x Yes [dropdown]</p> <p>* Does the Candidate have a CA medical license? Yes [dropdown]</p> <p>* Medical License Number [text input]</p> <p>* Degree(s) x MD [text input]</p> <hr/> <p style="text-align: center;">Contract Information</p> <p>* Contract Type MSP [dropdown]</p> <p>* Request Type New Contract [dropdown]</p> </div>
Note	<p>UCPath updated the benefit eligibility processes for rehired retirees in compliance with federal regulations effective July 1, 2025. Changes include.</p> <ul style="list-style-type: none"> <li>• UC will offer rehired retirees who 1) return to UC employment within 26 weeks (6 months) of retirement and 2) meet specific eligibility criteria the “Mid-level” faculty/staff benefits package</li> <li>• UC will suspend retiree medical benefits for rehired retirees who qualify for faculty/staff benefits even if they do not enroll</li> <li>• When rehired retirees lose eligibility for faculty/staff benefits because their UC employment ends or their hours fall below the eligibility threshold, they may re-enroll in the medical plan of their choice under the UC retiree health program</li> </ul>	<p><b>Rehired retiree benefits eligibility:</b>  <a href="https://ucnet.universityofcalifornia.edu/retirees/understanding-your-retiree-benefits/returning-to-work-after-retirement/rehired-retiree-benefits-eligibility/">https://ucnet.universityofcalifornia.edu/retirees/understanding-your-retiree-benefits/returning-to-work-after-retirement/rehired-retiree-benefits-eligibility/</a></p>