

***INFORMATION
FOR
EMERITUS PROFESSORS
AND
THEIR DEPARTMENTS***



Provided as a service of the
UCSD EMERITI ASSOCIATION

**Ninth edition
February 2016**

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UCSD Emeriti Association
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This booklet has been prepared by the UCSD Emeriti Association in an effort to bring together in one place useful information about emeritus status for retirees, for those who are about to retire, and for their departments. We call it “The Boynton Booklet” in honor of Robert Boynton, Professor Emeritus of Psychology, who produced the first edition in 1992, to consolidate information of interest to retirees that is otherwise scattered and sometimes difficult to locate. The booklet is not, however, an official publication of the UCSD Administration.

Although every effort has been made to provide accurate and current information, we caution readers that regulations are subject to change, and errors in content are certainly possible. We are indebted to the many individuals throughout the University who have provided information for, and have reviewed the content of, this and previous editions.

Some of the information herein has official status inherent in the rules and regulations of the University. For example, the basic regulations that concern emeriti and their privileges as Senate members are contained in The Standing Orders of The Regents 103.5(a) and 105.1(a). The emeritus title is conferred annually by The Regents upon professors and associate professors when they retire. (APM 120-0).

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DECIDING ABOUT RETIREMENT

When to retire is a personal decision. The UCSD Benefits Office can be of assistance with respect to the financial aspects of the decision. Financial info includes projections for UCRP income, consideration of tax issues, eligibility/costs for continuation of UC medical and dental plans, and general Medicare/UC Plan coordination. If age 65 or older at the time of retirement, the member/spouse will be required to apply and enroll in Medicare (if eligible). The UC Retirement Handbook is provided.

Questions regarding Social Security benefits should be referred to the Social Security Office at <https://ssa.gov/>.

For most emeriti, formal retirement does not amount to withdrawal from University activities. Although retirement typically results in some reduction of income, this can often be supplemented in various ways, including Recall to Active Duty (see pg. 17). For many emeriti, lessening of income may be more than compensated by the greater freedom that retirement brings.

The University of California Retirement Handbook <http://ucnet.universityofcalifornia.edu/forms/pdf/retirement-handbook.pdf> provides information regarding how benefits are calculated, payment options, tax provisions and future cost-of-living adjustments. Eligibility for continuation of health/welfare benefits are outlined along with other UC-sponsored insurance plans.

The election process can begin 90-days prior to the retirement date. In order to receive the first retirement check, the completed Election Form along with necessary documentation should be returned to UC Benefits within 60-days of the retirement date. After the retirement date, future questions should be addressed to UC Benefits at (800) 888-8267.

The financial aspects of retirement are complex, and some decisions are irrevocable (for example, the choice of payment options/contingent annuitant). It is important to consider and select options carefully.

DOCUMENTS NEEDED AT RETIREMENT TIME

To Institute UCSD Retirement: Birth evidence is required for a retiree's contingent annuitant (if named). A contingent annuitant is identified during the Personal Retirement Profile/Election process. A contingent annuitant would receive retirement income if the retiree passes away first. The retiree reduces his/her monthly income to provide income for the contingent annuitant. Several payment options are offered. Acceptable forms of date of birth include a birth certificate, passport or certificate of naturalization.

Marriage evidence is required if the retiring individual is married and elects monthly retirement income. If you were eligible for UCRP membership before July 1, 2013, the post-retirement survivor benefit is automatic.

Survivor benefits could be paid to a Domestic Partner if retiree elects monthly income. Evidence of the partnership is required. The post-retirement survivor benefit is automatic if UCRP membership was before July 1, 2013 and correct documentation provided.

Documentation establishing the domestic partnership must be provided to UC prior to retirement. Acceptable partnership evidence include a copy of the California state form filed with the Secretary of State; or if no state form, UC Declaration of Domestic Partnership (UBEN250). The form is within the booklet Benefits for Domestic Partners, which can be found at <http://ucnet.universityofcalifornia.edu/forms/pdf/benefits-for-domestic-partners.pdf>

The completed form should be sent to UC Benefits along with three supporting documents. (A list of acceptable documents is listed on the form.) Your domestic partnership must have existed for at least one year at the time of your retirement and continuously until your death. In addition, you must submit documentation establishing your domestic partnership to UC before you retire

For Social Security and Medicare: Birth certificate, California driver's license, Social Security card, name and address of employer, and most recent pay stub are required. If desired, registration for Social Security can be handled entirely by telephone, in which case the required documents are furnished by mail and will be returned. You may call the U.S. Social Security Administration, an agency of the Department of Health and Human Services, at (800) 772-1213 between 7 AM and 7 PM, to make an appointment for a telephone interview which may last as long as an hour. Registration for Social Security benefits may also be processed on line. The website for the Social Security Administration is <http://www.ssa.gov/> and the Social Security Benefit Application form can be completed on the following secure web site: <https://secure.ssa.gov/apps6z/ISBA/main.html>.

RIGHTS AND PRIVILEGES ASSOCIATED WITH EMERITUS STATUS

Continued Participation. Although there is no obligation to participate in any University activities, a majority of emeritus professors choose to do so. Most UCSD emeriti continue to be active in their fields and many continue to teach in their departments.

Philosophy. The University Administration regards emeriti as valuable members of the academic community and therefore desires that:

- emeriti be treated with respect and be provided with the opportunity to continue their scholarly activities;
- the campus makes effective use of their talents and expertise; and
- retirement be perceived as an attractive prospect for older faculty members.

Implementation. As members of the Academic Senate, and of the departments from which they have retired, emeritus professors continue to enjoy many privileges and benefits, with some exceptions and limitations, as noted in the following:

a) Identification. Just as before retirement, emeriti need a campus I.D. card (photo-ID) for identification. Applications can be obtained from your department assistant. Once the card is issued, it must be validated on an annual basis through the staff of your department. The Campus Card Unit of the Student Business Services is located in Suite 355 in the Student Services Center, 402 University Center (858) 822-4727). The office hours are 8:00 AM through 4:30 PM, Monday through Friday. A valid card is necessary for checking books out from the Library and for cashing checks. It may also be needed elsewhere on campus (such as the Credit Union or Price Center) for identification purposes.

Separate arrangements must be made through your department or the library for the use of your campus I.D. card in copying machines. Contact Imprints at (858) 534-2534.

The *Triton Cash* Account is a convenience available to anyone. It is based on the advance deposit of personal funds in a special account, accessed by the photo-ID. Automatic deposits can be made using Discover, MasterCard or Visa. Triton Cash is accepted at over 60 campus locations, including the Price Center Bookstore, Imprints Copy Centers, and participating restaurants. Arrangements to open an account should be made directly by calling (858) 534-7587, or online at <http://tritoncash.ucsd.edu/getstarted.asp>

b) Parking. Whereas most of the privileges associated with Senate membership continue and are available, the only *special* privilege is free parking. This privilege is offered to all faculty who have achieved Emeritus status, to Research Ph.D.'s at SIO, and to retired employees with 20 or more years of service credit to the University, who are not in a paid status (excluding pension). The Parking Office issues one free "A" hang tag permit for use in any vehicle used by the registered permit holder. This renewable permit is good for three years. The "A" permit privileges are designated as follows:

Campus: While on campus, you may park in any space where the posted sign reads "A" permit required 24 hours per day, 7 days per week; or in any "A" (red), "B" (green), or "S" (yellow) space. Additionally, when you display your "A" hang tag permit, you may park in a metered space (no fee required) from 4:30 PM to 7:45 AM, Monday through Friday.

Medical Centers: While visiting the Medical Centers, you may park in any space where the posted sign reads "A" permit required 24 hours per day, 7 days per week; or in any "A" (red), "B" (green), or "S" (yellow) space; the Arbor and Bachman parking structures; and the Thornton/Shiley lots (excluding patient parking areas).

Except for Scripps Institution of Oceanography and the Hillcrest and campus Medical Centers, no permit is required on weekends in unrestricted (Red, Green, or Yellow) or metered spaces.

Every three years, a pre-printed renewal application and information letter will be sent to your campus mail code or to your home address (whichever address is on file at the Parking office). Review the information on the application and sign and return it to the Parking Office (2nd Floor, Gilman Parking Structure) by the date specified on the letter. If you have not received a renewal application by June 1 of the third year, or if you are applying for the first time as an emeritus professor, contact the office of Transportation and Parking Services at

(858) 534-4223.

c) Bus Service to La Jolla Campus. UCSD emeriti (and all San Diegans) over the age of 60 can ride Metropolitan Transit System buses at a minimal charge, which can be automatically processed monthly via credit card. The current price is \$18 per month. Check the MTS website <http://www.sdmts.com/fares-passes/reduced-fares-and-passes> for details and the application form. Passes for emeriti are not sold through Transportation and Parking Services.

d) Motorist Assistance Program (MAP). Permit holders and visitors stranded in faculty, staff, or student lots are eligible for assistance with vehicle battery jumps, low tire inflation, vehicle lockout (nonelectric doors only), or a lift to the nearest service station. To arrange for service, call (858) 534-8108 in La Jolla or (619) 543-6524 at the Hillcrest Medical Center. Participating motorists must sign a waiver.

e) Health, Dental, Legal and Vision Care Benefits. For eligible retirees, health, dental, and the legal plan may continue in retirement. Medical premiums (if any) are deducted from the UCRP payment. Depending on enrollment status, some retirees also enrolled in Medicare may receive a Medicare premium reimbursement within their UCRP check. Medicare premiums are deducted from the Social Security check or paid directly by the retiree to Medicare. The reimbursement amount is based on the individual's health plan enrollment and is adjusted each year. The dental plan can be continued and the premium (if any) would be deducted from the UCRP payment. The premium for the group legal plan is deducted from the UCRP payment.

UC offers a vision plan option to retirees through Vision Service Plan (VSP) at <https://www.vsp.com/>. Benefits model the those currently available to UC employees. Retirees are eligible to enroll if they are:

- receiving monthly retirement (including disability or survivor income) from UC, and

- enrolled in a UC-sponsored medical, dental, or legal plan or have elected to suspend UC sponsored benefits.

Participation in the vision plan is voluntary. Premiums are based on a group rate and paid by the retiree. At the time of the retirement process, information is provided along with an enrollment form. VSP is occasionally offered as an open enrollment option. For questions about the benefits, contact VSP directly at 1-800-877-7195. Reference UC's Group Number, 12334445.

Open Enrollment occurs every year the beginning of November. Information is mailed to the retiree prior to the beginning of the open enrollment period. The information provides details on University sponsored health and welfare benefit plans changes as well as a link to the website to make changes.

Open enrollment change forms may also be obtained by accessing the Open Enrollment icon on UCnet <http://ucnet.universityofcalifornia.edu/> (during the Open Enrollment period) and clicking on annuitant open enrollment. Any questions regarding retiree benefit plans should be addressed to the Retirement Administration Service Center (RASC) at the Office of the President in Oakland at (800) 888-8267.

f) Eligibility to Attend Meetings. Emeritus professors continue to be members of their academic departments and are eligible to attend meetings of the San Diego Division of the Academic Senate, and to vote as members of the Representative Assembly of the Division if they are designated by their departments to serve as departmental representatives. They may also serve on University and/or system-wide Academic Senate committees. As members of their departments, they are entitled to be notified of, and to participate in, regular departmental events, including colloquia, meetings, etc. However, according to Academic Senate Bylaw 55, the privilege of being notified of meetings on personnel actions, gaining access

to materials, and participating in the meetings is extended to emeriti *only* if approved by a two thirds vote of the non-emeritus Senate faculty.

Voting Restrictions. Under Academic Senate Bylaw 55, emeriti may be granted, by the departments from which they retired, the right to vote in their department on non-personnel matters by a majority vote of non-emeritus members of the department, and, on personnel matters, by a two-thirds vote of the same members. The department's policy about voting applies equally to all emeritus members of the department. The right to participate in meetings on personnel matters is independent of the right to vote on them, but both require a two-thirds majority vote of eligible faculty. Emeriti should check with their departments on the status of departmental policy on voting and participation. Apart from the restrictions noted, emeriti retain full membership in their departments upon retiring.

g) Dissertation Committees. It is not necessary to formally recall an emeritus professor to active duty for that person to serve as a chair or member of a doctoral committee. Thus, emeriti may continue to serve as members and chairs of doctoral committees on which they were serving at the time of retirement, and no documentation is necessary for this. As with all new appointments to doctoral committees, appointment of emeriti to these committees requires the approval of the department chair and the Dean of Graduate Studies and Research. Department chairs are asked to assess briefly the capacity of an emeritus professor to take on the long term commitment implied by such appointments.

h) University Accounts and Access to Facilities and Services. Because decisions about how much space and support to provide emeriti are conditional on the amount of space and funding generally available, access to departmental space and secretarial services is not automatic. Emeriti may be provided with office space, laboratory space, and support ser-

vices within a department or an ORU by the chair or the director in accordance with the policies of the department or ORU.

It is the intent of the Administration to encourage departments to provide emeriti whenever possible with sufficient space and support to enable them to remain professionally active. If an emeritus professor has access to a University account or accounts, all of the services available to active faculty for which there normally are recharges, are available to that individual. This includes mail services, copying services, special library services for which there is a fee, use of machine shop facilities, and purchasing and accounting services.

Emeriti planning to submit a proposal for a research contract or grant are encouraged to initiate discussion at the departmental level at an early stage. As with any new contract or grant, the specific availability of space must be spelled out in the application, with final approval of the Dean of Graduate Studies and Research.

It is possible to set up through the department an “agency” account in which personal funds are deposited. Doing so provides a University account number to be used for any of the purposes listed above, or for any other services that are approved by the Assistant Vice Chancellor/Controller.

i) Accident Insurance. When traveling on University business, emeritus faculty are covered by the University accident insurance program, as are regular faculty. This means that \$100,000 in Accidental Death and Dismemberment insurance will be applicable during such travel, which obviates the need to subscribe to the optional insurance offered by rental agencies.

j) Mailbox. Emeritus faculty are entitled to a departmental mailbox which will provide a campus address, whether or not other facilities or services are being used. It is

suggested that such mailboxes be located so that all materials disseminated to regular faculty are also routinely distributed to emeriti. This would include announcements about faculty meetings, colloquia, health plans, University publications (including directories), and various documents circulated from time to time by central Administration, some of which may be of interest to retired faculty. The mailbox also allows members of the University community to communicate with the recipient using the internal mail service, and ensures that U.S. mail intended for the emeritus professor will be properly delivered.

It is important to establish with the department the location of the mailbox and mail code where mail will be sent or placed. Emeriti wishing a mailbox at a campus site remote from the department office must make arrangements with the department. For larger departments, it would probably be useful to ascertain which member of the departmental staff is responsible for matters relevant to emeriti.

k) Electronic Mail (email) and the Internet. Emeriti with access to a computer can continue to connect to the UCSD mainframe computers, either directly when on campus or via an outside cable modem or DSL connection from off-campus locations. Emeriti are also eligible to continue usage of their “@ucsd.edu” email account at no charge.

Information Technology Services (formerly ACT—Administrative Computing and Telecommunications) offers assistance configuring electronic mail and Web browsers. Staff are available via e-mail at acthelp@ucsd.edu or by telephone from 7:00 AM-7:00 PM, Monday through Friday, at (858) 534-1853. Emeriti are eligible for full support, but may need to identify themselves as such (rather than as staff retirees).

UCSD’s official web site <http://www.ucsd.edu> organizes campus web sites in one easy to use place. This site links to campus information, event listings, academic departments, re-

search units, student information, visitor resources, library services, local information, internet search tools, news, and weather reports.

l) Faculty Club. Faculty Club privileges and dues are \$10.00 per month (\$12.00 if it includes a spouse). These dues are \$4.00 less than those of regular faculty.

m) Sports and Recreation Facilities. The University's Sports and Recreation Facilities are available to emeriti on the same basis as for regular faculty. All new **Recreation Cards**, which provide discounted prices on recreational activities, must be purchased in person at the Recreation Intra-mural Athletic Complex (RIMAC). General information, including hours of operation can be obtained by calling UCSD Recreation at (858) 534-4037, or by visiting the UCSD Recreation department's website at <http://recreation.ucsd.edu>.

RECALL TO ACTIVE DUTY

Emeriti may be recalled to meet short term teaching, research, or administrative needs. Recall also provides emeriti with opportunities to remain engaged in teaching and research and to augment post-retirement income. Faculties recalled to teach are given the title, "Professor, Recalled to Active Duty (RTAD)." Faculty recalled for research only are given the title, "Research Professor."

- Faculty may be recalled at 46% time or less (43% time in the School of Medicine or if covered by Medicare) of their salary rate at the time of retirement, range adjusted to the current scale.
- Academic year faculty recalled to conduct research may be paid 1.5 summer ninths from their research grants (i.e., three summer ninths at 49% time).
- Faculty recalled to teach will be paid per course stipends based upon their base salary rate at the

- time of retirement.
- Multiyear recall appointments for faculty recalled to conduct research are permissible. Faculty recalled to teach must be appointed for one year or less, although they may be reappointed annually.

Faculty are recalled at the discretion of the University. Reappointments of recalled faculty are subject to annual administrative review, where appropriate, and to final approval by the cognizant divisional dean and/or the Executive Vice Chancellor of Academic Affairs. Requests for recall appointments originate with the department and are submitted to the Academic Personnel Office via the divisional dean. The proposed appointment specifies the date of recall, the duties, and the compensation and fund source. The retiree and the department receive copies of the approved request. Questions regarding these policies may be addressed to the faculty member's department, the divisional dean's office, or to the Academic Personnel Office.

Retirees who return to UC employment in a limited appointment (the equivalent of no more than 43% time for a period not to exceed 12-months) will not return to active UCRP membership. Prior to employment, rehired retirees should read *Returning to UC Employment After Retirement* at <http://ucnet.universityofcalifornia.edu/forms/pdf/returning-to-uc-employment-after-retirement.pdf>. The brochure provides the returning retiree with info on the impact of the rehire. A Retired Employee Election form will be provided by the hiring department for the retiree to complete. Rehired retirees who elected a lump sum cash out do not need to complete the form.

By accepting the conditions of the Rehired Employee Election, the retiree can continue to receive UCRP payments in addition to the paycheck from the University. At the end of the appointment, UCRP payments would continue and no ad-

ditional benefits or service credit accruals would be included.

As a non-UCRP member, 7.5% of salary would be deducted for the Defined Contribution Plan (<http://ucnet.universityofcalifornia.edu/forms/pdf/defined-contribution-plan-summary-description.pdf>). Additional details are outlined in the Returning to UC Employment After Retirement brochure, mentioned above.

If the reappointed retiree becomes an active UCRP member, retirement payments must cease. Please notify UC Customer Service immediately at (800) 888-8267 should you become an active member of UCRP. When the appointment ends, a recalculation would determine future benefits under UCRP. While reemployed as an active member, UCRP contributions would be deducted from salary.

The Rehired Employee Election has implications on health and welfare plans. UC retirees who are reappointed to an appointment that qualifies them for benefits can only be enrolled in benefits as an active member or as a retiree. They will have a choice of either the active benefits package or the annuitant (retiree) benefits package. Please check with your Benefits representative on campus for details.

Emeriti may teach without compensation with the approval of the department chair (or divisional dean(s) in the case of interdepartmental courses).

ORGANIZATIONS THAT SERVE EMERITI

The UCSD Emeriti Association. The Constitution of the UCSD Emeriti Association lists several purposes that the Association attempts to serve. Among these:

- To promote the general welfare of the members,

- their spouses, and their survivors;
- To assist members to continue their contributions to society; and
- To perform other acts necessary to attain and administer the Association's goals.

There are two types of members: Regular and Associate.

Regular members include those who, at retirement, are members of the Academic Senate, non-Senate recipients of the emeritus title, or non-Senate employees with educational and professional qualifications comparable to those of emeritus faculty who have been duly nominated and approved by the Executive Committee. Payment of annual membership dues, or one-time payment of lifetime membership dues, maintains regular membership.

Associate members consist of spouses of regular members, widows and widowers of former members and of Senate members who died in service while eligible to retire, and other persons duly nominated and approved by the Executive Committee. Except for the last category (persons nominated and approved by the Executive Committee), Associate members are not required to pay dues.

The Executive Committee of the UCSD Emeriti Association arranges the meetings of the entire membership. In addition, the Committee makes a special effort to keep abreast of issues affecting emeriti within the UC system and, when appropriate, acts as spokesperson for emeriti concerns. The Committee also nominates the emeritus representative on the divisional Academic Senate Committee on Faculty Welfare. At the final meeting of the academic year, the general membership elects new members and officers of the Executive Committee.

Information about the Emeriti Association, including its Con-

stitution and the names of current officers, is available from the UCSD Retirement Resource Center, (858) 534-4724, or visit the website at <http://emeriti.ucsd.edu> . Use it to check on regular meetings and special events for emeriti.

Dickson Award. Over a span of fifty years, a trust provided by UC Regent Edward Dickson has grown quite substantially. Dickson stipulated that the earnings from this endowment should both stimulate and recognize emeriti for their continuing service, teaching, and research. In 2003, UCOP split the fund 10 ways so that each campus could offer a \$10,000 award each year.

The Awards Committee of the UCSD Emeriti Association elected to use continued service, defined broadly, as the principle criterion for determining recipients.

The Committee invites nominations each fall for this award, based on service to students, to faculty development, to the emeriti, and to the community. The winner of the Dickson award is announced at the annual business meeting of the UCSD Emeriti Association in June of each year. For more information, contact the Emeriti Association via email at Emeriti@ucsd.edu or by calling (858) 534-4724.

Chronicles, Newsletter of the UCSD Emeriti Association.

This entertaining quarterly publication is currently edited by Sanford Lakoff. Contact him (slakoff@ucsd.edu) with suggestions or contributions.

Emeriti Mentor Program. Its purpose is to provide guidance to undergraduate students, specifically Chancellor's Scholars. It provides UCSD Emeriti Association members with an opportunity to make a positive and personally meaningful contribution to the university by helping undergraduate students steer their educational and professional careers to greater success through individual mentoring sessions. Currently, Chancellor's Scholars -- students from underprivileged fami-

lies -- are the target group being served by this program. Administrative support is provided to assist with meeting scheduling and follow-up. To participate, or for more information, call the UCSD Retirement Resource Center at (858) 534-4724 or send an email to: EmeritiMentor@ucsd.edu.

UCSD Retirement Resource Center. This is a comfortable facility shared by the Emeriti Association and the Retirement Association. It offers a fully equipped conference room, a private office for mentoring and private meetings, and a Director, Suzan Cioffi, and an Emeriti Mentor Program Coordinator. They may be reached by email at emeriti@ucsd.edu. The building, 400 University Center, is directly south of the Student Services Center. The phone is (858) 534-4724; the fax number is (858) 534-3767.

Council of UC Emeriti Associations (CUCEA). Each campus appoints one emeritus professor active in the local Emeriti Association to the Council of UC Emeriti Associations (CUCEA), a University-wide Council that meets twice annually to review issues of concern to emeriti. CUCEA elects a Chair and Vice Chair who serve as ex officio members of the University Committee on Faculty Welfare. Further information can be obtained from the CUCEA web site (<http://cucea.ucsd.edu>) or (<http://ucop.edu/cucea>). In essence, CUCEA acts as a channel designed to inform the Academic Senate and the Office of the President of issues of interest to emeriti, and to inform emeriti of relevant issues that are under discussion at systemwide levels.

UCSD Retirement Association. All retired staff and faculty are eligible to become members of the UCSD Retirement Association. A newsletter published monthly by the Association calls attention to a wide variety of activities, many of which are sponsored by the Association. Although officially a separate group from the UCSD Emeriti Association, there is excellent coordination between the Retirement and Emeriti associa-

tions, and some 70% of emeriti belong to both. Interested emeriti should contact the Director at (858) 534-4724. A complimentary copy of the *Gazette*, the UCSD Retirement Association newsletter will be mailed upon request.

IN CONCLUSION

If you are an emeritus, or considering retiring, the UCSD Emeriti Association sincerely hopes that you will find the retirement information in the Boynton booklet helpful. While the booklet has no official status, the information is a summary of current University policy and practices that affect emeriti. However, we suggest that you verify information about retirement issues by asking your department or the appropriate University administrative office (e.g. Benefits).

In order to keep the information as current as possible and to add new material as needed, the Boynton booklet is revised as needed. For this reason, we encourage you to forward your comments and suggestions to the UCSD Emeriti Association (UCSD Retirement Resource Center, (858) 534-4724 or via email to: Emeriti@ucsd.edu) in anticipation of increasing the usefulness of subsequent editions of this publication.

POSTSCRIPT: PASSING OF AN ACADEMIC COLLEAGUE

A resource webpage is available to provide guidance for:

- 1) sending notice of an academic colleague's passing
- 2) planning for a campus "Celebration of Life" event, and
- 3) encouraging senior and active retired faculty to initiate steps recommended for end of life planning.

Given that UC San Diego is now entering its fifty-sixth year as a general campus of the UC System, it should come as no surprise that its Emeriti Association (EA) now claims 550 members, more than half of them still active on campus, nor that many more will join after they elect retirement. And so it be-

comes the interest and concern of the EA that resources be made known to campus leaders in the event of the passing of a colleague.

The EA website, <http://emeriti.ucsd.edu>, now provides helpful links to the following resources on Blink:

- Link to ‘Campus Notices and Flyers’ for timely and efficient distribution of word that a colleague has passed.
<https://rmp.ucsd.edu/policy-records/notices.html>
- Link to the University Communications and Public Affairs for proper noticing of local newspapers and other publications:
<http://ucpa.ucsd.edu/about/contact/>
- Link to Process for Submission of Faculty Memorials, to be posted on UC History Digital Archives website
- Link to Faculty Club for planning a “Celebration of Life” event using the Club or just its catering function at any campus
http://facclub.ucsd.edu/mod_AboutUs/ContactUs.aspx
- Link to instruction and outline for completing a “Letter of Direction” which might serve to encourage senior faculty and retirees to begin their end of life planning well in advance of the fact.
http://retire.ucsd.edu/pdf/all/letter_of_direction.pdf

The importance of writing a ‘Letter of Direction’

Definition: Attorneys involved with end of life planning recommend completion of a “letter of direction” that serves two purposes: 1) it tells the location of important personal papers including access to online documentation, and 2) it expresses certain personal preferences. Such a letter does NOT have the same legal force as a trust or a will, an independent planning step, although ideally linked by selection of a trustee who will honor and fulfill provisions in the letter. A letter of direction should contain the following:

1. Notifications: If an organ will be donated, contact the Organ donation coordinator.. List all contact numbers for family members to be called, also doctors not already in attendance, religious advisors, personal attorney, designated trustees, financial advisors, insurance agent(s), academic department and designated colleagues, and all friends who wished to be notified. Also be sure to be notify UC Retirement Administration Service Center (RASC); cite UC employee number.

2. Personal Documents: Assemble in one place or else cite exact location of following personal documents: birth certificate, social security card, safe deposit box info/keys, marriage license, driver's license and vehicle registration, title to motor vehicles, property deeds, insurance policies (life, health, accident, auto), recent bank statement(s), check book(s), copies of trust and/or will, recent tax returns, investment account statements, pension information. Where applicable, include: naturalization papers, military discharge papers, firearms registration, divorce papers, business ownership records. Consider when feasible a photocopied set of briefest documents to be sent to a responsible family member domiciled elsewhere.

3. Credit Cards: List all credit card accounts to be terminated upon death, include issuer, location, account number and **very important** don't omit user IDs and passwords for internet access to each account.

4. Personal Property Decisions: List items of personal property to be given to specific individuals, institutions, or charities (these might also be listed in a trust or will)

5. Additional Instructions or steps to be taken personally:

Create a health issues checklist:

1. Faced with terminal disease diagnosis consider second opinion.
2. Ask for all treatment alternatives including palliative care.

3. Sign HIPAA authorization, indicating who may know of your health status
4. Complete advance directives; select health proxy
5. Execute legal DNR (do not resuscitate) order
6. Execute legal DNH (do not hospitalize) order

Identify Burial Instructions:

1. Designate your choice of funeral home/mortuary
2. Indicate if you want to be embalmed, buried or cremated
3. Do you want a burial plot or marker?
4. Will your memorial service be religious or military?
5. Your preferred campus site for a “Celebration of Life”
6. Who will deliver the eulogy (or eulogies)?
7. Identify a desired charity for “in lieu of flowers.”

6. Drafting an obituary: Who is better qualified to write your obituary than you? Begin by reviewing newspaper formats then proceed according to your own style. Designate a respected colleague to update and edit the final version before public notice.

Attorneys reveal that one of the biggest problems, when assisting the family of a deceased client, evolve from absence of a lucid and thorough letter of direction. Too many decisions are left to chance or to family squabbling after the fact. The message is clear; now is time to proceed.

Useful Contacts

UC Retirement Administration Service Center (RASC)

Contact RASC Customer Service via Online Form at
[https://contactrasc.universityofcalifornia.edu/contacts/
csform.html](https://contactrasc.universityofcalifornia.edu/contacts/csform.html)

P.O. Box 24570
Oakland, CA 94623-1570
Phone: (800) 888-8267 (in U.S.)
Phone: (510) 987-0200 (from outside the U.S.)
Monday through Friday, 8:30 am—4:30 pm (PT)
Fax: (800) 792-5178

UC San Diego Benefits Office:

Assistant Vice Chancellor, Human Resources
Robert Crouch (858) 534-0286,
rcouch@ucsd.edu

Administrative Assistant
Almira Henson, (858) 534-2816,
ahenson@ucsd.edu

Health Care Facilitator
Debra Wells, (858) 822-2197,
dmwells@ucsd.edu

Health Care Assistant
Anna Calhoun, (858) 534-9686
acalhoun@ucsd.edu

Benefits Representatives

- Jo Morales, (858) 534-5244
jmorales@ucsd.edu
- Barbara Diamond, (858) 822-2241
badiamond@ucsd.edu

U.S. Social Security Administration

Website: <http://www.ssa.gov/>

Phone: (800) 772-1213

UCSD Retirement Resource Center

Administrative center for:

- **UCSD Emeriti Association**
- **UCSD Emeriti Mentoring Program**
- **The Chronicles**
and the
- **UCSD Retirement Association**

Phone: (858) 534-4724

Email/Emeriti: Emeriti@ucsd.edu

Email/Retirees: RetireeLink@ucsd.edu

Location: UC 400, Directly south of the Student
Services Building

Mailing Address:

9500 Gilman Drive, MC 0020

La Jolla, CA 92093-0020

Director: Suzan Cioffi, scioffi@ucsd.edu

Mentoring Program, emeritmentor@ucsd.edu

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*UCSD Emeriti Association
9500 Gilman Drive, MC 0020
La Jolla, CA 92093-0020*

(858) 534-4724

*Emeriti@ucsd.edu
www.emeriti.ucsd.edu*