Welcome to Carolina

Benefits & Work/Life Programs
New Employee Orientation

Benefits & Work/Life Programs
104 Airport Drive, Campus Box 1045
Chapel Hill, NC 27599-1045
Phone: (919) 962-3071  Fax: (919) 962-6010
http://hr.unc.edu
# Benefits & Work/Life Programs

## What we will discuss today

- Benefits Eligibility (Employee and Dependents)
- Retirement Plans
- Health Insurance
- NC Flex Plans
- Disability Plans
- Vacation, Sick & Leave plans
- Employee Assistance Program
- Tarheel Discounts & Perks
- Work/Life & Wellness Programs

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## Eligibility

- Permanent part-time employees working 20-29 hours per week are eligible for all benefits except mandatory retirement, disability insurance and 401(k)
  - Employees must pay full cost of health coverage
- Permanent (non-temporary) full-time employees working 30 or more hours per week are eligible for all benefits
**Dependent Eligibility**

- Dependent children are eligible for coverage up to age 26 (dependent children over age 19 must not be eligible for employer sponsored health coverage)
- Domestic partner coverage available for Reliance Standard AD&D, United Concordia Dental and MetLife Group Term Life Insurance
- Spouse is eligible for all benefit plans where dependent coverage is offered

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**Benefit Changes/Updates**

**Address**

- Enter your permanent/home address into the UNC Directory: [dir.unc.edu](http://dir.unc.edu)

**When can I make changes to my benefit elections?**

- **Qualifying Life Events**
  - Notice must be made within 30 days of the event
  - Examples include; birth, death, marriage, divorce, change in job status for self or spouse, etc.
- **Annual Enrollment**
- **After-Tax Plan Flexibility**
Mandatory Retirement Programs

- Participation in a retirement program is mandatory
- Contributions begin on day one of eligibility
- You may choose between:
  - The North Carolina Teachers' and State Employees' Retirement System (TSERS), a defined benefit plan or
  - The UNC Optional Retirement Program (ORP), a defined contribution plan
- You must make your election between TSERS and ORP within 60 days of your eligibility date (usually your hire date)
- Retroactive contributions are deducted in one lump sum
- Once enrolled, you may not change your election (irrevocable)
  - Automatic TSERS enrollment if no election is made
Teachers’ and State Employees’ Retirement System (TSERS)

- **Defined Benefit Plan**
  - Based on a predetermined formula that considers creditable service, age, and average compensation
  - Employee contribution is 6% of pay
  - Employer contribution funds benefits for all plan participants

- Members become vested in the TSERS plan once they’ve completed a minimum of ten years of membership service
- Vesting allows member to apply for lifetime monthly retirement benefits based on the current retirement formula, their age and service requirements
- Retirees are eligible for health plan benefits
- Service purchase options
  - Temporary service
  - Military service
  - Withdrawn service
Teachers’ and State Employees’ Retirement System (TSERS)

- Beneficiaries can be designated online at: mync-retirement.com
- **Death Benefit:**
  - Must have 12 months of contributing membership service
  - Benefit is based on reported earnings ($25,000 min - $50,000 max)
- **Options after leaving the University:**
  - Leave contributions in account
  - Withdraw contributions (taxes and penalty)
  - Roll over to another retirement account
  - Retire

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Teachers’ and State Employees’ Retirement System (TSERS)

**Unreduced/ Full Retirement**

- 30 years at any age
- 25 years & at least age 60
- 10 years & at least age 65

**Reduced/ Early Retirement**

- 20 years/age 50
- 10 years/age 60

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Optional Retirement Program (ORP)

- Defined Contribution Plan
  - Contributions are made by you and the University
  - Employee contributes 6% of pay
  - Employer contributes 6.84% of pay
  - Value of account is based on contributions made to your account and performance of investment funds selected
  - Portability!
- Retirees are eligible for health plan benefits
- Five year vesting for employer contribution
- Review the retirement plan decision guide

Optional Retirement Program (ORP)

- Complete the ORP-1
- Set up your investment account(s) with your selected vendor(s)
- Vendors can assist with asset allocation & can run retirement projections for both TSERS and ORP
- Each vendor provides 20 core funds to choose from and each vendor provides lifecycle funds
- Choose from four investment providers (Fidelity Investments, Lincoln Financial Group, TIAA-CREF and VALIC)
Retirement Plan Reminders

- Complete the retirement acknowledgment/election form
- Your retirement election must be made within 60 days of eligibility
- Contributions into the retirement plan are effective the first day of eligibility
- Retroactive contributions are payroll deducted in one lump sum
- Retirement choice cannot be changed; it is irrevocable
- Designate beneficiaries for TSERS, or
- Complete ORP-1 and set up your account(s) for ORP

Supplemental Retirement Plans

- Consider boosting retirement savings by participating in one or more of the supplemental retirement plans offered
- There are three types of plans available:
  - 403(b): administered by UNC General Administration; two vendors (Fidelity and TIAA-CREF)
  - NC 401(k): sponsored by the NC Dept. of State Treasurer and administered by Prudential (11 institutional funds)
  - NC 457: same as NC401k
- Enroll, change or stop participation at anytime
- IRS contribution limits apply
  - Aggregated 403b/401k limit
  - 457 stands alone
Health Insurance

State Health Plan of North Carolina

- Three health plan options administered by Blue Cross and Blue Shield of North Carolina (BCBSNC)
  
  **Traditional 70/30 PPO Plan**
  - Higher co-pays, coinsurance & deductibles
  - No cost to full-time employee for employee only coverage

  **Enhanced 80/20 PPO Plan**
  - Lower co-pays, coinsurance & deductibles
  - Affordable Care Act (ACA) preventive care services and medications are covered at 100%
  - Wellness premium credits reduce the subscriber premium

  **Consumer-Directed Health Plan**
  - High deductible health plan with a health reimbursement account
  - ACA preventive services/medications covered at 100%
  - Wellness premium credits reduce the subscriber premium
State Health Plan of North Carolina

- Coverage is not automatic, you must enroll!
- Enroll on-line within 30 days: unc.hrintouch.com
- Use UNC Onyen and password
- Part-time employees add $448.12/mo. Premium, full cost
- Two effective date options:
  - First of the month following employment date -OR-
  - First of the second month following employment date
  - Hired in January, choose February 1st or March 1st

State Health Plan of North Carolina

- Health insurance premiums are paid **one month in advance** of coverage
  - Example: January premiums pay for February coverage
- No pre-existing conditions or waiting periods if you enroll when first eligible
- Spouses and legally dependent children up to age 26 are also eligible for coverage under all plans
### 2014 SHPNC Premium Rates

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<td>Health Assessment</td>
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#### Employee/Retiree Only
- $13.56
- $28.56
- $33.56
- $43.56
- $48.56
- $48.56
- $63.56

#### Employee/Retiree + Child(ren)
- $286.36
- $301.36
- $306.36
- $316.36
- $321.36
- $321.36
- $336.36

#### Employee/Retiree + Spouse
- $679.94
- $694.94
- $694.94
- $699.94
- $709.94
- $714.94
- $729.94

#### Employee/Retiree + Family
- $642.10
- $657.10
- $657.10
- $662.10
- $672.10
- $677.10
- $692.10

### Consumer Directed Health Plan with HRA

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#### Employee/Retiree Only
- $0.00
- $10.00
- $20.00
- $30.00
- $30.00
- $40.00

#### Employee/Retiree + Child(ren)
- $184.60
- $194.60
- $194.60
- $204.60
- $204.60
- $214.60
- $224.60

#### Employee/Retiree + Spouse
- $475.68
- $485.68
- $485.68
- $495.68
- $495.68
- $505.68
- $515.68

#### Employee/Retiree + Family
- $506.64
- $516.64
- $516.64
- $526.64
- $526.64
- $536.64
- $546.64

### Traditional 70/30 PPO Plan

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</table>

#### Employee/Retiree Only
- $0.00

#### Employee/Retiree + Child(ren)
- $205.12

#### Employee/Retiree + Spouse
- $528.52

#### Employee/Retiree + Family
- $562.94

### Health Plan Options

#### Enhanced 80/20 Plan
- The current Standard 80/20 Plan with a new name to match the new features
- $0 ACA Preventive Services
- $0 ACA Preventive Medications
- Reduced medical copay opportunities

#### Consumer Directed Health Plan (CDHP) with HRA
- High-deductible medical plan
- HRA offsets the deductible
- 85/15 Coinsurance (after deductible)
- $0 ACA Preventive Services
- $0 ACA Preventive Medications
- CDHP Preventive Medication List ($0 deductible)
- Additional HRA funds for visiting certain providers

#### Traditional 70/30 Plan
- The current Basic 70/30 Plan with a new name
- No incentives available
- No $0 ACA Preventive Services
- No $0 ACA Preventive Medications
Focus On Wellness

Enhanced 80/20 Plan
Wellness premium credits when:
• Completes Health Assessment
• Employee attests for themself and spouse to not smoking or to being in a smoking cessation program
• Selects a Primary Care Provider (PCP) for self and all dependents

Additional wellness incentives
• $15 copay reduction for utilizing the PCP (or someone in that practice) listed on the ID card
• $10 specialist copay reduction for Blue Options Designated Specialist
• $0 inpatient hospital copay for Blue Options Designated Hospital

Consumer Directed Health Plan (CDHP) with HRA
Wellness premium credits when:
• Completes Health Assessment
• Employee attests for themselves and spouse to not smoking or to being in a smoking cessation program
• Selects a Primary Care Provider (PCP) for self and dependents

Additional wellness incentives
• $15 added to the HRA when the PCP (or someone in that practice) listed on the ID card is seen
• $10 added to the HRA when a Blue Options Designated Specialist is seen
• $50 added to HRA when a Blue Options Designated Hospital is used for inpatient services

Traditional 70/30 Plan
• No incentives available
• No $0 ACA Preventive Services
• No $0 ACA Preventive Medications

Wellness Premium Credits

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<th>How to Complete It</th>
<th>When Members Can Take It</th>
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<td>Employee selects a Primary Care Provider (PCP)</td>
<td>Visit <a href="http://unc.hrintouch.com/">http://unc.hrintouch.com/</a> to select a PCP. If members have trouble locating a provider, they can contact 888-234-2416.</td>
<td>Changes to PCP can be made at any time. (Takes up to 5 days to update)</td>
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<tr>
<td>Employee completes a confidential Health Assessment (HA)</td>
<td>Health Assessments can be completed online at: <a href="http://unc.hrintouch.com/">http://unc.hrintouch.com/</a> once the member ID number is generated following initial enrollment or by phone at 800-817-7044.</td>
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<tr>
<td>Employee attests to being a non-smoker/commits to a cessation program and attests for spouse if applicable</td>
<td>Through the online enrollment system. Log into <a href="http://unc.hrintouch.com/">http://unc.hrintouch.com/</a> to complete the attestation.</td>
<td>To quit smoking, the Plan offers assistance through QuitlineNC. Members can access at: <a href="http://www.QuitlineNC.org">www.QuitlineNC.org</a> or call 800-QUIT-NOW (800-784-8669)</td>
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SHPNC Prescription Coverage

- Prescription coverage provided by Express Scripts for the Enhanced 80/20 PPO Plan and Traditional 70/30 PPO Plan:
  - Generic: $12 co-pay, up to 30-day supply
  - Preferred Brand-name: $40 co-pay, up to 30-day supply
  - Non-preferred Brand-name: $64 co-pay, up to 30-day supply
  - Specialty: 25% coinsurance up to $100, 30-day supply
- CDHP Prescriptions are covered at 15% after individual deductible is met
  - ACA Preventative Medications are covered at no cost
  - CDHP Preventative Medication has no deductible, only 15% coinsurance

NC Health Choice for Children

- Families who make too much money to qualify for Medicaid but too little to afford rising health insurance premiums can get free or reduced-price comprehensive health care for their children through the North Carolina Health Choice for Children program

- For additional information or questions call 1-800-422-4658 or go online at http://www.dhhs.state.nc.us/dma/cpcont.htm
State Health Plan of North Carolina

- State Health Plan Website: [www.shpnc.org](http://www.shpnc.org)
- All employees must complete online enrollment at [unc.hrintouch.com](http://unc.hrintouch.com) to select the Traditional 70/30 PPO Plan, the Enhanced 80/20 PPO Plan or the Consumer Directed Health Plan
- The State Health Plan and NCFlex share a single portal for benefit plan changes and enrollment.

NCFlex Benefits Overview
NCFlex Enrollment

- NCFlex voluntary programs provide a variety of plans
- Participants pay the full cost of coverage through payroll deductions before taxes are withheld
- Plans are effective the 1st of the month after hire date
- Programs include:
  - Dental Insurance & Vision Insurance
  - Flexible Spending Accounts (Health and Dependent Day Care)
  - Cancer & Critical Illness Plans
  - Group Term Life Insurance
  - Core AD&D and Voluntary AD&D Insurance
- Enroll online at: http://unc.hrintouch.com/

Health Care Flexible Spending Account  p.7

- Set aside money through pre-tax contributions to pay for eligible out-of-pocket medical, dental and vision expenses:
  - Deductibles
  - Co-pays and coinsurance
- Contribute from $120 to $2,500 annually
- Convenience card (debit card) for all participants
- Full election amount is available on the effective date
- “Use it or lose it” rule: you forfeit any unused contributions
  - Expenses can be incurred between January 1, 2014 to March 15, 2015 and claims must be submitted by April 30, 2015.
Dependent Day Care Flexible Spending Account  p.11

- Set aside money through pre-tax contributions to pay eligible child care and adult day care expenses for:
  - Qualifying child(ren) under age 13
  - Qualifying child(ren) of any age, spouse or other dependent who meets specific eligibility requirements which take into account disability, residence and financial support
- You may contribute from $120 to $5,000 per year
  - To learn more about tax implications, review page 13
- Expenses must be incurred and funds must be available to receive reimbursement
- “Use it or lose it” rule; you forfeit any unused contributions
  - Expenses can be incurred between January 1, 2014 - March 15, 2015 and must be submitted by April 30, 2015

Dental Plan  p.15

- Coverage provided through United Concordia
- Choose from two plan options:
  - High Option
    - Higher premium, more robust benefits including orthodontia coverage for kids under 19
  - Low Option
    - Lower premium, reduced benefits, no orthodontia coverage
- Under both options:
  - Visit any provider
  - You or your dentist may file claims
  - Review “Benefit Waiting Periods” chart (pg. 17)!
Vision Insurance  p.19

- Coverage provided through Superior Vision Services
- Choose from three coverage options:
  - **Core Wellness Exam**: Available to employees at **no cost** and includes an annual comprehensive eye exam for a $20.00 co-pay.
  - **Basic Plan**: Exam and Materials plan that offers reduced premiums and $20.00 co-pay on contact lens exam and eyeglass frame allowance to $125 retail and calendar year frequency.
  - **Enhanced Plan**: Enhanced Exam and Materials plan that offers reduced premiums, a $20.00 co-pay on contact lens exam and an eyeglass frame allowance to $175.00 retail.

Other NCFlex Insurance Plans  p.23

- **Critical Illness Insurance**  pg. 23
  - Pays lump sum benefit in event of certain health conditions based on three categories
  - Age-based rates

- **Cancer Insurance**  pg. 26
  - Pays benefits for expenses related to cancer and 29 other diseases/conditions
  - Low, High and Premium options
  - Preventive, wellness and screening benefits available
Accidental Death & Dismemberment Plans

- NCFlex plan provided through A.C. Newman
  - Core AD&D (pg. 29)
    - $10,000 of coverage at no cost
    - *Must enroll!*
  - Voluntary AD&D (pg. 31)
    - Coverage for employee and dependents up to $500,000

- UNC Plan provided through Reliance Standard
  - After tax plan that offers dependent coverage for spouse, domestic partner and child(ren)
  - Participants can elect coverage in amounts of $10,000 to $500,000, not to exceed ten times their annual salary

NCFlex Group Term Life Insurance  *p. 33*

- Group Term Life Insurance
  - Employee only coverage in $10,000 increments, from $20,000 to $500,000 (limited to 5x salary)
  - Coverage over $100,000 subject to Evidence of Insurability (EOI)
  - Age-based rates
  - Dependent coverage is offered on an after tax basis
  - Employee premium will be pre-taxed up to $50,000.
Additional UNC Insurance Plans

MetLife Group Term Life Insurance (after-tax)

- Coverage available in salary multiples from 1 to 7 times annual salary
- Evidence of Insurability is required for coverage in excess of 3 times salary and/or coverage amounts above $500,000
- Age-based rates
- Dependent coverage is available for spouse/domestic partner and child(ren)
- Participants are eligible for Will Preparation and Estate Resolution Services
Income Protection Programs

- Programs designed to provide you with financial protection in the event of disability/long-term illness
- State provided Short Term Disability Plan
- State provided Long Term Disability Plan
- Supplemental Disability plans
  - Liberty Mutual Long Term
  - Standard Long Term

Disability Income Plan of NC (DIP-NC)

- No-Cost disability coverage provided to employees who participate in TSERS or ORP
- **Short-Term Disability**
  - Payable after one year of TSERS or ORP contributing membership
  - Pays 50% of base compensation up to $3,000/month
  - Payable up to 365 days, after 60-day waiting period
- **Long-Term Disability**
  - After five years of contributing membership to TSERS or the ORP
  - Pays 65% of base compensation up to $3,900/month
  - Social Security Disability off-set applies
  - Payable until the earliest date of unreduced retirement benefit eligibility or otherwise no longer eligible.
Supplemental Disability Plans

- Designed to supplement DIP-NC benefits
- 90-day waiting period
- Replaces up to 66-2/3% of base monthly salary up to $10,000
- Voluntary benefit; you pay full cost of coverage after-tax
- Coverage through The Standard if you elect ORP
  - Includes continuation of contributions into ORP account
- Coverage through Liberty Mutual if you elect TSERS
- Enrollment in supplemental plan must correspond with retirement plan selected

Vacation, Sick and Other Leave Programs
Types of Leave

- Civil
- Community Service
- Educational
- Family & Medical
- Family Illness
- Voluntary Shared
- Military
- Vacation
- Sick
- Workers’ Compensation

Vacation Leave

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<td>13 hours 20 minutes</td>
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<td>15 – 20 years</td>
<td>15 hours 20 minutes</td>
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<tr>
<td>20 + years</td>
<td>17 hours 20 minutes</td>
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</table>

*Leave earnings are prorated for part-time employees
**Vacation Leave**

- Vacation leave balances are maintained by your HR Representative and in TIM
- Must be in “pay status” for one-half or more of the work days and holidays in a month in order to earn vacation leave for that month
  - Working, paid leave, or paid holiday
- Vacation Leave Uses:
  - Religious observances
  - Medical appointments/Sick leave
  - Adverse weather

**Sick Leave**

- Full-time employees earn 8 hours/month
  - Prorated for part-time employees
- No maximum carry-over amount
- Sick leave provides additional credit for TSERS participants; every 20 days (160 hours) of sick leave equals an additional month of retirement credit
- Sick leave uses:
  - Absence due to illness, injury, or medical appointment of the employee or the employee’s immediate family
  - Temporary disability due to childbirth; adoption
  - Absence due to the death of immediate family member
Other Leave Programs

- **Family Medical Leave**
  - Leave for absences due to childbirth, adoption, or a serious health condition of an employee or an employee’s spouse, child or parent
  - Protects an employee's job and health insurance benefits

- **Family Illness Leave**
  - Family Illness Leave provides up to 52 weeks of unpaid leave in a 5-year period for the employee to provide care to:
  - Family Illness Leave is unpaid leave but an employee may use available vacation, bonus or sick leave to receive pay

- **Voluntary Shared Leave**
  - Employees receive donated vacation, bonus or sick leave from co-workers or family members in a period of serious health condition

Work/Life & Wellness Programs
Work/Life and Wellness Programs

As part of our on-going commitment to the health and wellness of employees, the University offers a variety of programs focused on healthy lifestyles and balancing the responsibilities of work and personal life. Programs include:

- Child Care
- Elder Care
- Educational
- Emergency Loan
- Employee Assistance
- Flexible Work Arrangements
- Work Well, Live Well
- Parenting Programs
- Rewards & Recognition

http://hr.unc.edu/benefits/index.htm

Work/Life & Wellness Resources

- University Child Care – 919-929-2662
- Child care resource & referral
  - Orange County – 919-967-3277
  - Durham County – 919-403-6950
  - Wake County – 919-779-2220
- Elder care resource & referral – 877-327-7658
- Parenting programs – 919-962-6008
- Employee Assistance Program
  - Confidential counseling and resource program for employees and their families
  - Off-site EAP Services: ComPsych (24 hr./day) 877-314-5841
  - Online resources at www.guidanceresources.com
Tar Heel Discounts & Perks

Expand your horizons through a variety of discount programs that provide access to some of the region’s best arts and entertainment, inter-collegiate athletic action and other jewels. Check out our website for information on the latest deals for:

- Arts & Entertainment (Ackland Art Museum)
- Campus Resources (Optical Shop)
- Employee Discounts (Cell Phone Providers)
- Leisure & Recreation (Campus Recreation)

http://hr.unc.edu/benefits/discounts-and-perks/index.htm

Educational Programs

Tuition Waiver Program
- Eligible employees can have tuition waived for two courses per academic year at any of the 17 constituent institutions of the UNC system
- Courses may be taken for career development or for personal interest

Other Tuition Assistance Programs
- Educational Assistance
- Fee Waiver
- Undergraduate Scholarship Programs

College Foundation of North Carolina
- The College Savings Plan allows employees to begin saving money for college for themselves or anyone else they would like
- Account earnings are free from Federal and North Carolina income taxes when the money is used to pay for qualified higher education expenses
An employee wellness program focused on overall health in four areas:

<table>
<thead>
<tr>
<th>Mind</th>
<th>Balance</th>
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<tbody>
<tr>
<td>Learn ways to reduce stress and discover more positive, enthusiastic focus on life and self.</td>
<td>Supporting and encouraging employees as they strive to achieve personal satisfaction at work and in daily life.</td>
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</table>

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<thead>
<tr>
<th>Body</th>
<th>Community</th>
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<tbody>
<tr>
<td>Programs and resources to support and encourage a healthy lifestyle for all employees.</td>
<td>Programs and initiatives that enable employees to contribute to the welfare of the surrounding community.</td>
</tr>
</tbody>
</table>

Visit our website: http://go.unc.edu/workwell

Important Deadlines & Reminders
Enrollment Deadline

- On-line enrollment for Health and NCFlex benefits must be completed within 30 calendar days of your eligibility (hire) date
- Enrollment forms for any University benefits you elect must be received in the Benefits Services Office within 30 calendar days of your eligibility (hire) date

Important Reminders

- Each new employee’s address defaults to:
  - 104 Airport Drive, Chapel Hill, NC 27599
- Change the permanent/home address online at: [http://dir.unc.edu](http://dir.unc.edu)
- Use HR Connect ([hrconnect.unc.edu](http://hrconnect.unc.edu)) to identify your Benefits Consultant
- Notify your Benefits Consultant of any problems you may have completing the online process
Important Websites

- Human Resources Website: hr.unc.edu
- HR Connect to identify your Benefits Consultant: hrconnect.unc.edu
- Campus Directory: dir.unc.edu
- State Health Plan: shpnc.org
- NCFlex Information and Forms: ncflex.org

Enrollment Websites & Effective Dates

- NCFlex and State Health Plan Enrollment/Changes: http://unc.hrintouch.com/
- Teachers & State Employees Retirement System: http://myncreirement.com/

<table>
<thead>
<tr>
<th>PLAN NAME</th>
<th>COVERAGE EFFECTIVE</th>
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<tbody>
<tr>
<td>Health Benefits</td>
<td>First of the month (or first of the second month)</td>
</tr>
<tr>
<td></td>
<td>following employment date</td>
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<tr>
<td>NCFlex Benefits</td>
<td>First of the month following employment date</td>
</tr>
<tr>
<td>Short-Term Disability</td>
<td>After 1 year of TSERS or ORP membership</td>
</tr>
<tr>
<td>Long-Term Disability</td>
<td>After 5 years of TSERS or ORP membership</td>
</tr>
<tr>
<td>Supplement Disability Plan</td>
<td>Date of Hire</td>
</tr>
<tr>
<td>TSERS</td>
<td>Date of Hire</td>
</tr>
<tr>
<td>ORP</td>
<td>Date of Hire</td>
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</table>
Reminder: New Employee Orientation Survey

- Following this session, you will receive an email invitation to complete a survey about new employee orientation. Your feedback is important and will assist us in tailoring future sessions to the needs of new employees.

- If you do not have access to a computer, you may obtain a paper form by contacting the New Employee Orientation Coordinator at 919-843-2300.

Who to Call for More Info

Benefits Services
Benefits Services Phone # 962-3071
Campus Box # 1045
Fax # 962-6010
Email: benefits@unc.edu

http://hr.unc.edu