

STATE OF WASHINGTON
NAVIA BENEFIT SOLUTIONS CHANGE IN STATUS FORM



Employees may enroll or change their Medical Flexible Spending Arrangement (FSA) or Dependent Care Assistance Program (DCAP) election(s) when a special open enrollment (SOE) event occurs. Your employer must receive this form **no later than 60 days** after the SOE event that allows a change to your Medical FSA or DCAP. You also must provide your employer with evidence of the event that created the SOE. Your employer must verify your change in status event (including your supporting documentation) and fill out Section III before forwarding this form to Navia Benefit Solutions. **(Exception: University of Washington (UW) employees must make changes online in Workday.)**

If you have transferred to another state agency to a position that is eligible for Public Employees Benefits Board (PEBB) benefits, use the *Agency Transfer Form* to continue your Medical FSA and/or DCAP elections. See the Medical FSA or DCAP enrollment guides for additional information. You can find the form at <http://pebb.naviabenefits.com>.

Instructions

1. **Section I—Employee Information.** Fill out this section completely to ensure enrollment.
2. **Section II—Event That Creates an SOE.** Check the SOE event that allows the change (documentation is required).
3. **Section III—Change of Election.** Write the new per paycheck and/or annual election amount.
4. **Section IV—Signature.** Return this form and proof of the SOE event to your personnel, payroll, or benefits office for signature.

Section I – Employee Information

Name (Last, First, MI):		SSN (or Employee ID if higher-education):		Date of Birth:
Street Address:		City:	State:	ZIP Code:
Daytime Phone:	Home Phone:	State Agency or Higher-Education Institution Name:		
Date of Event Creating the SOE:		Employer Use Only		
		Benefit Effective Date:		Effective Payroll Date:

DEBIT CARD HOLDERS: Your debit card will become inactive if your Medical FSA participation as an employee ends. After that, submit claims online, or by mobile app, fax, email, or mail before the end of the claims filing period. See instructions in the Medical FSA and DCAP enrollment guides.

Section II – Event That Creates a Special Open Enrollment (SOE)

Events that create an SOE for employees enrolled in Medical FSA or DCAP are listed in Washington Administrative Code 182-08-199: (Check the box below that applies to you)

- A qualified tax dependent becomes eligible under PEBB rules and enrolls in benefits. Includes: marriage or registering a domestic partnership, birth, adoption, assuming a legal obligation for total or partial support in anticipation of adoption, when a child becomes eligible as an extended dependent, or a change in the number of family members qualifying for DCAP.
- Employee or eligible dependent has a change in employment status that affects the employee's or a dependent's eligibility for Medical FSA or DCAP. If on Family Medical Leave Act (FMLA) period, provide dates of FMLA period below.

Start date _____ End date _____

Additional events for employees enrolled in a Medical FSA that create an SOE:

- A qualified tax dependent no longer meets PEBB eligibility. Examples: change in marital status, domestic partnership dissolved, or dependent dies.
- A court order or National Medical Support Notice requires the subscriber or another individual to provide insurance coverage for an eligible dependent.
- Employee or an eligible dependent loses coverage under a group health plan or through health insurance coverage, as defined by the Health Insurance Portability and Accountability Act (HIPAA).
- Employee or an eligible dependent becomes entitled (eligible and enrolled) to Medicare, Medicaid, or a Children's Health Insurance Program (CHIP), or loses eligibility for PEBB benefits or a medical assistance program, including Medicaid or CHIP.

Additional events for employees enrolled in DCAP that create an SOE:

- A change in dependent care provider or provider changes the cost of care.
- A change in enrollment under another employer-based group health plan during their annual open enrollment that does not align with PEBB annual open enrollment.
- A change in the number of qualifying individuals as defined in Internal Revenue Code 26 U.S.C. § 21 (b)(1)

Change due to termination or leave of absence (ineligible for benefits):

Check the box below to select how your employer will handle your contributions. Please check with your employer to find out which section is allowed by your payroll/benefits office.

Medical FSA:

- Accelerate contributions from last paycheck to continue participation with your employer for total annual contributions on a pre-tax basis, **if allowed by payroll/benefits office.**
- Continue Medical FSA participation (by submitting COBRA election form) and pay monthly contributions through employer and participation to plan year-end on an after-tax basis. This is available to participants who have claimed less than they have contributed.
- Arrange a schedule with employer's payroll/benefits office to "catch up" Medical FSA payments when returning to work. (Applies only to leave under FMLA and requires **prior** employer approval. You will not be able to claim expenses incurred during the leave. Or make arrangements with your employer about your contributions before going on leave.)
- Terminate contributions and participation. (For FMLA leave: when you return to work you may resume the same deductions through your employer (automatically decreases annual election) or increase deductions to maintain your annual election.) Any expenses incurred during FMLA leave are not eligible for reimbursement.

DCAP:

- Stop contributions and allow reimbursement for eligible expenses. (Note: only expenses incurred while working or looking for work will be reimbursed).

Section III – Change of Election for Medical FSA and/or DCAP

Medical FSA:

$$\frac{\text{New per paycheck}}{\text{New per paycheck}} \times \frac{\text{\# of paychecks remaining}}{\text{\# of paychecks remaining}} + \frac{\text{Year to date contributed}}{\text{Year to date contributed}} = \frac{\text{New annual election}}{\text{New annual election}}$$

DCAP:

$$\frac{\text{New per paycheck}}{\text{New per paycheck}} \times \frac{\text{\# of paychecks remaining}}{\text{\# of paychecks remaining}} + \frac{\text{Year to date contributed}}{\text{Year to date contributed}} = \frac{\text{New annual election}}{\text{New annual election}}$$

Section IV – Signature

Employee's Signature _____ Date _____

Employer's Signature _____ Date _____

RETURN THIS FORM TO YOUR EMPLOYER WITH SUPPORTING DOCUMENTATION

Separation from Service: If the employee revokes existing elections due to termination and experiences more than 30 days break in PEBB benefits coverage, they cannot enroll or reenroll in a Medical FSA or DCAP during the same plan year.

Agency Transfer: Do not use this form. You must complete the *Agency Transfer Form* to continue your Medical FSA or DCAP election(s) and notify your new employer's personnel, payroll, or benefits office to continue your contributions for your Medical FSA and/or DCAP account. You must notify your new employer about your Medical FSA or DCAP account **no later than 30 days after you transfer and before December 31, 2018**. You cannot change your election due to an agency transfer.

For personnel, payroll, or benefits office staff: Review this form, check Section III for accuracy, and sign Section IV. Return the completed form to Navia Benefit Solutions by fax, email or mail.

Fax: (425) 233-6366 **Email:** election@naviabenefits.com **Mail:** P.O. Box 53250 Bellevue, WA 98015

Customer Service Line: (800) 669-3539 or visit us at <http://pebb.naviabenefits.com>