

# Status Change Form

\*=Required Fields

## Step 1: Participant Information

\*Participant Name (First, MI, Last)

\*Social Security Number

\*Employer Name

Employee ID

\*Participant Mailing Address

\*City

\*State

\*Zip

Email Address

Day Telephone

\*Birth Date (mm/dd/yyyy)

\*Hire Date (mm/dd/yyyy)

## Step 2: Qualifying Event Information

\*Please select the qualifying event that applies to the request for an election change. In accordance with the IRS Consistency Rule, changes to a cafeteria plan election due to a change in status must be consistent with the effect the change in status has on eligibility under the plan.

Change in Number of Dependents	
<input type="checkbox"/>	Increase in number of dependents due to birth, adoption or marriage
<input type="checkbox"/>	Decrease in number of dependents due to death, divorce or loss of eligibility

Dependent Care Only Changes	
<input type="checkbox"/>	Change in day care provider
<input type="checkbox"/>	Change in the cost of day care
<input type="checkbox"/>	Judgment, decree or order requiring change in coverage

Employment Status	
<input type="checkbox"/>	Loss of eligibility due to a change in participant, spouse or dependent employment status
<input type="checkbox"/>	Gain of eligibility due to a change in participant, spouse or dependent employment status

Other	
<input type="checkbox"/>	Enrollment to or loss of Medicare or Medicaid coverage
<input type="checkbox"/>	Special requirements relating to Family and Medical Leave Act (FMLA)
<input type="checkbox"/>	COBRA election under employer's plan

## Common Status Change Events

<b>Change in Legal Marital Status</b>	This pertains to any event associated with a change in an employee's legal marital status. Common examples include marriage, death of a spouse, divorce, legal separation and annulment.
<b>Number of Dependents</b>	This pertains to any event associated with a change in an employee's number of dependents. Common examples include birth, death, adoption and placement of adoption. A dependent is formally defined to be a tax dependent under Code Section 152.
<b>Dependent Satisfies or Ceases to Satisfy Eligibility Requirements</b>	This pertains to any event that causes an employee's dependent to satisfy or cease to satisfy eligibility requirements for coverage. The most common example is a dependent attaining a certain age.
<b>Employment Status</b>	This pertains to any event associated with a change in employment status of an employee, the employee's spouse or an employee's dependent. Common examples include loss of employment, gain of employment and loss or gain of eligibility due to part-time or full-time status.
<b>Adoption Assistance</b>	This pertains to any event associated with the commencement or termination of an adoption proceeding.



# Status Change Form, continued

## Step 3: Election Change Information

Please check one:

Medical FSA    Limited FSA

\*Date of qualifying event (mm/dd/yyyy)

\*Date of first payroll deduction (mm/dd/yyyy)  
The first payroll the change in election will affect.

\*Previous annual election

\*New annual election  
The new annual election cannot be lower than the contributions to date or the total claims paid and cannot be greater than the employer designated maximum.

### Dependent Care FSA

\*Date of qualifying event (mm/dd/yyyy)

\*Effective date of change in election (mm/dd/yyyy)

\*Date of first payroll deduction (mm/dd/yyyy)  
The first payroll the change in election will affect.

\*Previous annual election

\*New annual election  
The new annual election cannot be lower than the contributions to date or the total claims paid and cannot be greater than the employer designated maximum.

## Step 4: Authorization and Signatures

I understand that this Status Change Form must be submitted within a reasonable amount of time as deemed by the IRS and my employer. Further, I understand the election change I have requested must be consistent with the change in status event, and the effective date of the election change may not be prior to the qualifying event date. I certify that the above information is accurate.

\*Employer Signature

\*Date

\*Participant Signature

\*Date