

WA STATE PEBB CHANGE IN STATUS FORM

Navia Benefit Solutions



Employees may enroll or revoke their Medical Flexible Spending Arrangement (FSA) or Dependent Care Assistance Program (DCAP) elections, and make a new election, when a special open enrollment (SOE) event occurs. The change you make must correspond to and be consistent with the event. For example, if your dependent ceases to meet Public Employees Benefits Board (PEBB) eligibility rules mid-year, that event only allows you to decrease your DCAP election amount. 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 give your employer evidence of the qualifying event that created the SOE. (Exception: UW and WSU employees must make changes in Workday.)

Special flexibility due to COVID-19: An Internal Revenue Service (IRS) rule change that passed in December 2020 allows you to change your 2021 Medical FSA or DCAP election without a qualifying event. This opportunity is available three times: in March, June, and September 2021. To change your election, contact your payroll or benefits office for specific deadlines. (UW and WSU employees must use Workday.)

If you have transferred to another state agency or higher education institution to a position eligible for PEBB benefits, and you had 30 days or less between employments, do not use this form. Instead, use the *PEBB Agency Transfer Form*, available at pebb.naviabenefits.com, to continue your Medical FSA or DCAP elections. You must tell your new employer about your Medical FSA or DCAP account **no later than 31 days after your first day of work** with the new employer and before December 31, 2021. You cannot change your election due to a transfer.

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:	Name of state agency or higher-education institution:			
Date of event creating the SOE (if applicable):		Employer Use Only			
		Benefit effective date:		Effective payroll date:	

Section II – Event That Creates a Special Open Enrollment (SOE) or Allows an Election Change

Check the box below that applies to you. In most cases, you must submit documentation of the event with this form.

<p>Internal Revenue Service rule changes that allow employees to change their 2021 annual elections: (No qualifying event or supporting documentation required. Opportunity available only during the months listed below.)</p> <p><input type="checkbox"/> March 2021 <input type="checkbox"/> June 2021 <input type="checkbox"/> September 2021</p>
<p>SOE events that allow employees to change their election amount or enroll in Medical FSA or DCAP are listed in Washington Administrative Code 182-08-199: (Check the box below that applies to you)</p> <p><input type="checkbox"/> 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, a child becoming eligible as an extended dependent, or a change in the number of family members qualifying for DCAP.</p> <p><input type="checkbox"/> 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.</p> <p>Start date _____ End date _____</p>
<p>Additional SOE events that allow employees to change their election amount or enroll in a Medical FSA:</p> <p><input type="checkbox"/> A qualified tax dependent no longer meets PEBB eligibility. Examples: change in marital status, domestic partnership dissolved, or dependent dies (applicable only to employees looking to change their election amount).</p> <p><input type="checkbox"/> A court order requires the subscriber or another individual to provide insurance coverage for an eligible dependent.</p> <p><input type="checkbox"/> 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).</p> <p><input type="checkbox"/> 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.</p>
<p>Additional SOE events that allow employees to change their election amount or enroll in DCAP:</p> <p><input type="checkbox"/> A change in dependent care provider or provider changes the cost of care.</p> <p><input type="checkbox"/> A change in enrollment under another employer-based group health plan during their annual open enrollment that does not align with the PEBB Program annual open enrollment.</p> <p><input type="checkbox"/> A change in the number of qualifying individuals as defined in Internal Revenue Code 26 U.S.C. § 21 (b)(1)</p>

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 or 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 your payroll or benefits office.
- Continue Medical FSA participation (by submitting COBRA election form to Navia Benefit Solutions) and pay monthly contributions through the employer to participate until 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 payroll or 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).

Debit card holders: Your debit card will become inactive if your Medical FSA or DCAP participation as an employee ends (or if you retire). After that, submit claims online, or by mobile app, fax, email, or mail before the end of the claims filing period.

Section III – Change of Election for Medical FSA

Write your new contribution amount for each paycheck and fill in the rest of the fields to calculate your new annual election.

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

- Decrease Medical FSA annual election to \$** _____

I verify this amount is not lower than either the amount I have contributed or the amount I have spent to date, whichever is higher. The minimum annual election is \$240.

- Increase Medical FSA annual election to \$** _____ *Subject to the plan year maximum: \$2,750*

Section IV – Change of Election for DCAP

Write your new contribution amount for each paycheck and fill in the rest of the fields to calculate your new annual election.

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

- Decrease DCAP annual election to \$** _____

I verify this amount is not lower than either the amount I have contributed or the amount I have spent to date, whichever is higher.

- Increase DCAP annual election to \$** _____ *Subject to the new 2021 plan year maximum: \$10,500*

Section V – Signatures

Employee's Signature _____ Date _____

Employer's Signature _____ Date _____

RETURN THIS FORM TO YOUR EMPLOYER WITH SUPPORTING DOCUMENTATION (if required)

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

For payroll or benefits office staff: Review this form, check Sections III and IV for accuracy, verify any required supporting documentation, and sign Section V. Return the form to Navia Benefit Solutions by fax, email, or mail.

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

Customer Service Line: (800) 669-3539 or visit pebb.naviabenefits.com