



# Flexible Spending Account Change of Status Form

Company Name	76-411618 Group Num	Location
Social Security Number <span style="float:right;"> <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> </span>		
First Name	MI	Last Name
Address		
City	State	Zip Code
Gender	Marital Status	Date of Birth

## CHANGE OF STATUS

Qualified Event Causing the Change:

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Marriage                 | <input type="checkbox"/> Birth or Adoption of Child    | <input type="checkbox"/> Change in Member's Employment |
| <input type="checkbox"/> Divorce                  | <input type="checkbox"/> Loss of Dependent Eligibility | <input type="checkbox"/> Change in Spouse's Employment |
| <input type="checkbox"/> Death of Spouse or Child | <input type="checkbox"/> Leave of Absence              | <input type="checkbox"/> Other: _____                  |

Qualified Event Date:   /   /

HEALTHCARE	New Contribution per Pay Period \$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	X	Number of Pay Periods Remaining in Plan Year <input type="text"/> <input type="text"/>	+	Year to Date Contribution Amount <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
= <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>					
New Annual Election Amount Cannot exceed \$2,500.00					

DEPENDENT CARE	New Contribution per Pay Period \$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	X	Number of Pay Periods Remaining in Plan Year <input type="text"/> <input type="text"/>	+	Year to Date Contribution Amount <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
= <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>					
New Annual Election Amount CANNOT EXCEED \$5,000 PER HOUSEHOLD					

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**AUTHORIZATION:** Sign and date your form and submit to your benefit services department.

I elect to participate in my employer's Flexible Spending Account Plan and agree to be bound by the terms of my employer's plan. I understand that the contribution(s) I have elected will be made with pre-tax salary reductions and that such reductions reduce my compensation for Social Security benefit purposes. I understand that this agreement is only for eligible services and treatment provided during the Plan Year and that said services must be provided before the submission of claims for reimbursement. I also understand that I am making a binding election for the entire Plan Year unless I have a qualified change of status as defined by my employer's plan. Any salary deductions that have not been used for expenses incurred in the Current Plan Year will be forfeited.

If the Plan Administrator determines that an expense I submitted for reimbursement was not a qualified expense under the Plan Documents, I shall immediately reimburse the plan for the entire amount of the unqualified expense. If I fail to timely reimburse the Plan, I understand that amounts may be withheld from wages or from otherwise valid expenses under the Plan in order to reimburse the unqualified expense.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

For Human Resources / Benefits Department Use:

**APPROVED BY:**

**COMMENTS:**