



Section 125 Cafeteria Plan Change in Status Form

Complete this form when a change in status has occurred which affects your Cafeteria Plan election. All changes must be due to and consistent with the change in status.

Employee Name: _____	Company Name: _____
Social Security Number: _____	Phone: _____
Employee Address: _____	
Effective date of Change: _____	If terminating, date of last deduction: _____

As a participant in the Cafeteria Plan, I am entitled to revoke my prior benefits election and enter into a new election in the event of certain changes in status. I understand that the change in my benefits election must be due to and consistent with the change in status and that the change must be acceptable under the Regulations issued by the Department of Treasury.

I certify that I have incurred the following change in status:

Change in Marital Status

Change in legal marital status including marriage, death of the spouse, divorce, legal separation or annulment.

Change in Number of Tax Dependents

Change in the number of tax dependents including birth, adoption, placement for adoption or death of a dependent.

Changes in Spouse or Dependent's Eligibility Under an Employer's Plan

Change in dependent status in satisfying or ceasing to satisfy the eligibility requirements of the plan, such as attainment of limiting age or student status or change in marital status.

Judgment, decree or order including the imposition of a Qualified Medical Child Support Order. Gain or loss of Medicaid or Medicare entitlement.

Entitlement to COBRA.

Special requirement relating to the Family and Medical Leave Act (FMLA).

Change in Employment Status that Changes Eligibility Status

Change of employment status, such as termination or commencement of employment by the employee, spouse or dependent.

Change in work schedule, such as a reduction or increase in hours of employment by the employee, spouse or dependent, including a switch between part-time, and full-time, a strike or lockout, a change in worksite, or commencement of return from an unpaid leave of absence.

Return to work from Unpaid Leave of Absence.

Effective Date of Return _____.

Catchup Deductions Yes No (if no is selected please complete Election change at bottom of form)

Change in eligibility due to change in residency of the employee, spouse or dependent.

Change in Cost or Coverage (applicable for health insurance and dependent care assistance account elections only)

Significant cost increase in your or your dependent's coverage.

Significant curtailment of your or your dependent's coverage.

Addition or elimination of benefit package option under your or your dependent's employer's plan.

Change in coverage or open enrollment of spouse or dependent under other employee's plan provided that the employee, spouse or dependent elects coverage under the dependent's plan.

Dependent care provider is replaced by another.

Please change my election(s) as follows:

Premium Savings Account

Change **insurance premiums** to \$ _____ per pay period.

FSA Medical Expense Account

Change my annual election for my **Health Care Expense Account** from \$ _____ to \$ _____. My new per pay period election will be \$ _____ effective with the _____ payroll.

Dependent Day Care Expense Account

Change my annual election for my **Dependent Care Expense Account** from \$ _____ to \$ _____. My new per pay period election will be \$ _____ effective with the _____ payroll.

Employee Signature _____ Date _____

Company Representative: _____ Date _____

