

## Benefit Enrollment / Change Form

<b>Employee</b>	<b>First Name:</b>	<b>M.I.</b>	<b>Last Name:</b>		<b>SSN:</b>	<b>Gender:</b> <input type="checkbox"/> Male <input type="checkbox"/> Female
	<b>Mailing/Street Address:</b>	<b>Apt./Ste.</b>	<b>City:</b>	<b>State:</b>	<b>Zip Code:</b>	
	<b>Birth Date:</b>	<b>Hire Date:</b>	<b>Marital Status:</b> <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced		<b>Phone Number:</b>	<b>Email:</b>
<b>Enrollment</b>	<b>Enrollment Type:</b>	<input type="checkbox"/> New Hire	<input type="checkbox"/> Open Enrollment	<input type="checkbox"/> Qualifying Event	<input type="checkbox"/> Decline ( <i>See Decline Section</i> )	
	<b>Qualifying Event Type:</b> ( <i>If applicable</i> )	<input type="checkbox"/> Marriage / Divorce		<input type="checkbox"/> Birth / Death		<input type="checkbox"/> Court Order
		<input type="checkbox"/> Loss of Coverage		<input type="checkbox"/> Reduction in Hours		<input type="checkbox"/> Change Name / Address
		<input type="checkbox"/> COBRA		<input type="checkbox"/> Other _____		
<b>Medical</b>	<b>Medical Plan Election:</b>	<input type="checkbox"/> Copay Plan		<input type="checkbox"/> HSA Plan	<input type="checkbox"/> Decline	
	<b>Medical Plan Coverage:</b>	<input type="checkbox"/> Employee Only		<input type="checkbox"/> Employee + Child(ren)	<input type="checkbox"/> Employee + Spouse	<input type="checkbox"/> Family
<b>Dependents</b>	<b>Name</b>	<b>SSN</b>	<b>Relationship</b>	<b>Sex (M/F)</b>	<b>Disabled (Y/N)</b>	<b>Include on Medical Plan</b>
<b>HSA Election</b>	<input type="checkbox"/> Yes, I would like to set up a Health Savings Account (This option is available if you enroll in the HSA plan). Your annual deduction will be divided into equal amounts and deducted from each pay period throughout the year.					
	I elect to have an ANNUAL deduction of \$_____ (maximum of \$3,500 for employee-only coverage, or \$7,000 for all other levels of coverage) reduced from my salary before taxes to reimburse me for qualified expenses which I incur during the plan year. Maximum contribution to the HSA Plan will be reduced by company contribution. Employees who are age 55 or older can make a catch-up contribution of \$1,000 in addition to IRS maximums.					
<b>Decline</b>	<input type="checkbox"/> I understand the benefits provided by the Group Insurance Contract under ERISA regulations include Health and/or Dental coverages. I have reviewed and understand the benefit options and requirements presented herein. I understand that I may not be eligible to enroll myself and dependents if I desire to apply for coverage at a later date, unless I qualify to enroll at a later date in accordance with the special enrollment conditions.					
	<input type="checkbox"/> I understand by not enrolling in this plan or a Marketplace health plan as mandated by PPACA, that I may be subject to a tax penalty.					
<b>Other Insurance</b>	<input type="checkbox"/> I do not have other insurance coverage			<input type="checkbox"/> I have enrolled thru the state or federal Marketplace		
	<input type="checkbox"/> I have other insurance coverage			<input type="checkbox"/> I have other insurance coverage, but intend to cancel that coverage		
	<b>Policy Holder Name:</b>			<b>Policy Holder Date of Birth:</b>		
	<b>Insurance Company Name:</b>			<b>Insurance Company Address:</b>		
	<b>Policy Number:</b>			<b>Group Number:</b>		
	<b>Names of Covered Individuals:</b>					
<b>Employee Authorization</b>	<input type="checkbox"/> I understand I have the option to pay the premiums for my employer-sponsored health plan through a before-tax reduction of my salary. I understand that if this amount increases or decreases during the plan year, my salary reduction will be adjusted to reflect that increase or decrease. I hereby apply for the coverage for which I am now or may be eligible under this group policy. I hereby authorize the deduction from my earnings of the required contribution, if any, toward the cost of such coverage. I authorize payment of medical benefits to all providers, where applicable, for those charges covered by my group insurance benefits. I authorize release to or by HealthEZ of any medical information including copies of medical records or insurance information as necessary for claims adjudication, utilization review, or coordination of benefits.					
	<input type="checkbox"/> To the best of my knowledge and belief, the information I have provided on this form is complete and correct. I acknowledge that the terms of the Summary Plan Description govern all payments made by the Plans.					

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

\_\_\_\_\_  
Date