



Southwestern University  
2022 Benefits New Employee/Change  
Form For Bi-Weekly Paid Employees

2022  
Semi-Monthly

**Employee Information**  Check box if New Address or Phone

Employee Name: (Last, First, Middle) <b>Please Print</b> _____ Phone: _____ Address: (Street, City, State, Zip Code) _____	Social Security #: _____ Email: _____ Date of Birth: (mm/dd/yyyy) Marital Status <input type="checkbox"/> Single <input type="checkbox"/> Married _____ <input type="checkbox"/> Male <input type="checkbox"/> Female				
	<table border="1" style="border-collapse: collapse;"> <tr> <td style="width: 50px;">HR Use Only</td> <td>MO/SM Contribution</td> </tr> <tr> <td>EBC</td> <td></td> </tr> </table>	HR Use Only	MO/SM Contribution	EBC	
HR Use Only	MO/SM Contribution				
EBC					

**Reason for Completing This Form** (this change form & required documentation must be submitted to Human Resources within 30 days of qualifying event)

<input type="checkbox"/> Open Enrollment <input type="checkbox"/> New Hire <input type="checkbox"/> Birth or Adoption <input type="checkbox"/> Divorce <input type="checkbox"/> Marriage <input type="checkbox"/> COBRA	<input type="checkbox"/> Death of Spouse or Dependent <input type="checkbox"/> Termination of other group health plan <input type="checkbox"/> Change in Spouse/Dependent's employment status <input type="checkbox"/> Qualified Medical Support Order <input type="checkbox"/> Return from Leave of Absence <input type="checkbox"/> Other _____	<input type="checkbox"/> Change in Health Savings Account (HSA) Deduction Amount Only (no qualifying event required) Event Date: _____ Benefits Change Effective Date: _____
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**Medical**  Yes, I wish to change my medical coverage.  No, I do not wish to change my medical coverage.  Waive Coverage

(Select ONE Dollar Amount) NOTE: All deductions are made on a Pre-Tax basis. Semi-Mon Prem/Code

Plan Choice:	Employee Only	Emp + Spouse	Emp + Child(ren)	Emp + Family	
<input type="checkbox"/> High Deductible Health Plan	<input type="checkbox"/> \$0.00	<input type="checkbox"/> \$93.08	<input type="checkbox"/> \$26.58	<input type="checkbox"/> \$160.91	_____
<input type="checkbox"/> Base PPO Plan	<input type="checkbox"/> \$24.48	<input type="checkbox"/> \$146.98	<input type="checkbox"/> \$62.94	<input type="checkbox"/> \$230.26	
<input type="checkbox"/> Buy-Up PPO Plan	<input type="checkbox"/> \$76.58	<input type="checkbox"/> \$248.13	<input type="checkbox"/> \$143.59	<input type="checkbox"/> \$365.18	

**Dental**  Yes, I wish to change my dental coverage.  No, I do not wish to change my dental coverage.  Waive Coverage

(Select ONE Dollar Amount) NOTE: All deductions are made on a Pre-Tax basis. Semi-Mon Prem/Code

Plan Choice:	Employee Only	Emp + Spouse	Emp + Child(ren)	Emp + Family	
<input type="checkbox"/> PPO Plans	<input type="checkbox"/> \$23.32	<input type="checkbox"/> \$40.13	<input type="checkbox"/> \$39.08	<input type="checkbox"/> \$60.85	_____
<input type="checkbox"/> High <input type="checkbox"/> Low					
<input type="checkbox"/> DMO-Managed Care	<input type="checkbox"/> \$5.66	<input type="checkbox"/> \$10.77	<input type="checkbox"/> \$11.34	<input type="checkbox"/> \$17.57	

Provider (PCDID) Number: \_\_\_\_\_

**Vision**  Yes, I wish to change my vision coverage.  No, I do not wish to change my vision coverage.  Waive Coverage

(Select ONE Dollar Amount) NOTE: All deductions are made on a Pre-Tax basis. Semi-Mon Prem/Code

Plan Choice:	Employee Only	Emp + Spouse	Emp + Child(ren)	Emp + Family	
<input type="checkbox"/> Vision	<input type="checkbox"/> \$3.58	<input type="checkbox"/> \$5.73	<input type="checkbox"/> \$5.85	<input type="checkbox"/> \$9.43	_____

**Subtotal amount to be deducted:**

\_\_\_\_\_  
Last name, first name, middle initial (print)

**Flexible Spending Accounts (FSA) / Health Savings Account (HSA) Election**

Yes, I wish to elect a **dependent care Flexible Spending Account (FSA)** with a semi-monthly contribution of: \$ \_\_\_\_\_ (DCB) (\$5,000 annual limit).

Decline dependent care flexible spending account.

Yes, I wish to elect a **medical Flexible Spending Account (FSA)** with a semi-monthly contribution of: \$ \_\_\_\_\_ (SAB) (\$2,850 annual limit). Do not choose this option if you wish to enroll in the High Deductible Health Plan (HDHP).

Decline medical care flexible spending account.

Yes, I wish to elect a **Health Savings Account (HSA)** (You must enroll in the HDHP and complete this section to elect coverage. Southwestern University will contribute \$50.00-single or \$100.00-employee + dependent on a semi-monthly basis into your HSA account if you choose to elect the High Deductible Health Plan (HDHP)). \$ \_\_\_\_\_ (EHB1)

In addition to what Southwestern University contributes to my HSA, I elect a semi-monthly contribution of: \$ \_\_\_\_\_ (IHB) (not to exceed the annual maximum of \$3,650 for employee only or \$7,300 for employee + dependent medical coverage; a \$1,000 catch up contribution for employees age 55 and up is available).

I do NOT wish to contribute into my Health Savings Account.

**Term Life / AD&D Election and Optional Dependent Life Coverage Effective: \_\_\_/\_\_\_/22**

Yes, I wish to elect **Term Life / AD&D Employee Coverage for 2 times my annual salary:**  
Salary \_\_\_\_\_ X 2 = \_\_\_\_\_ Rounded Amount \_\_\_\_\_ /1000= \_\_\_\_\_ X .167= \_\_\_\_\_ /2=( \_\_\_\_\_ x12)/26= \_\_\_\_\_ Approx. Bi-Wkly prem

I Waive Term Life / AD&D Employee Coverage

**Optional Life Dependent Coverage**

Yes, I wish to elect Optional Dependent Life Coverage

Option One: \$2.68 Bi-Wkly= \$25,000/\$10,000 of coverage       Option Two: \$1.11 Bi-Wkly= \$10,000/\$5,000 of coverage

I Waive Optional Dependent Life Coverage

**Total amount to be deducted:**

**Retirement Plan - TIAA/CREF Regular Retirement Plan 403(b)**

Not Eligible until after one year waiting period: Effective Date of Coverage: \_\_\_\_\_

Eligible as of : \_\_\_\_\_

ELIGIBILITY PENDING UNTIL DOCUMENTATION IS RECEIVED AND VERIFIED. \_\_\_\_\_

**Family Information** (Medical, Dental & Vision) Complete the following information for dependents only if you are adding or deleting dependent coverage. For additional dependents, please use a separate form. Enter names as they appear on the SS card.

Name	Add/ Drop	Sex M/F	Social Security Number	Birthdate (mm/dd/yyyy)	Married	Coverage
Spouse	<input type="checkbox"/> A <input type="checkbox"/> D	<input type="checkbox"/> M <input type="checkbox"/> F			N/A	<input type="checkbox"/> Medical <input type="checkbox"/> Dental <input type="checkbox"/> Vision
Child	<input type="checkbox"/> A <input type="checkbox"/> D	<input type="checkbox"/> M <input type="checkbox"/> F			<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Medical <input type="checkbox"/> Dental <input type="checkbox"/> Vision
Child	<input type="checkbox"/> A <input type="checkbox"/> D	<input type="checkbox"/> M <input type="checkbox"/> F			<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Medical <input type="checkbox"/> Dental <input type="checkbox"/> Vision
Child	<input type="checkbox"/> A <input type="checkbox"/> D	<input type="checkbox"/> M <input type="checkbox"/> F			<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Medical <input type="checkbox"/> Dental <input type="checkbox"/> Vision

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Last name, first name, middle initial (print)

**Authorization**

- I authorize Southwestern University to make periodic salary reductions from my paycheck to be deposited in my account for the election period specified above in an amount equal to the premiums required for the coverage elected above plus the specific dollar amounts, if any, elected for the Flexible Spending Accounts and/or the Health Savings Account. The salary reductions will be made in substantially equal amounts, to the extent administratively feasible. I further authorize WEX/Discovery Benefits to disburse funds from my account in accordance with the Plan and my elections.
- I further acknowledge that I must submit Reimbursement Requests to receive reimbursement from my flexible spending account(s) if I did not utilize my debit card to pay for services. Additionally, I understand that there may be times that I will be required to provide an itemized receipt when my debit card is used.
- My elections (other than the Health Savings Account contributions), including coverage types, cannot be altered without a qualified Change in Family Status as defined by the Internal Revenue Code.
- The Southwestern University plan year runs from January 1, 2022 through December 31, 2022. The grace period for incurring Health Care and Dependent Care Flexible Spending Account expenses has been extended to March 15, 2023. The deadline for filing all claims will be March 31, 2023.
- The unused balance of the Flexible Spending Accounts are forfeited if unclaimed by March 31, 2023. I understand that if my employment terminates prior to March 15, 2023, the unused balance of the Flexible Spending Accounts are forfeited if unclaimed within 45 days following my termination date, unless otherwise extended under applicable continuation coverage rules.
- I hereby verify that, if I have elected salary reduction contributions for the Dependent Care benefit in the amounts which will exceed \$2,500 in one calendar year, and if I am married, I will file a joint income tax return with my spouse.
- By participating and pre-taxing the above premiums, the computing and reporting of my federal income tax will be based on my reduced salary, as will my FICA (social security) contributions.
- If I enroll in the HDHP and elect contributions to the Health Savings Account, I understand that I will be required to submit additional documentation to the custodian of the Health Savings Account in order to open, and have contributions made to, the Account. Further, I understand the applicable eligibility requirements for Health Savings Account contributions and confirm I am eligible to make such contributions and have contributions made on my behalf. I understand that I am solely responsible for any tax consequences related to my participation in the Health Savings Account.

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Employee Signature

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Date