

Allowable Status Changes

This is a general listing of accepted status changes. Please be aware that your company may have different status change rules, so please check your company's plan documents for specific rules and exclusions. All status changes must be verified by your HR department, typically within 30 days, before any payroll changes can be made.

Six categories of events are allowed with strict consistency rules. Only events fitting within one of the categories can support an election change and the change must be absolutely consistent with the event. The following rules apply to the Premium Conversion, Medical Reimbursement, and Dependent Care Reimbursement Accounts:

Events Permitting Election Change	Notes
Change in legal marital status	
Change in number of dependents	
Change in employment status	Can be a change in the participant or dependent as long as it affects benefit eligibility
Dependent satisfies or ceases to satisfy dependent eligibility requirements	
Change in residence	Must have reasonable effect on eligibility
Commencement or termination of adoption proceedings	

Additional events are allowed for Premium Conversion and Dependent Care Reimbursement Accounts Only. These events do not apply to the Medical Reimbursement Account:

Events Permitting Election Change	Notes
Cost Changes, with automatic increase/decreases	Exception: If care giver is a relative, no change is permitted
Significant coverage change/curtailment	
Change in coverage of spouse or dependent under another employer's Plan	
Change in Coverage of Spouse or Dependent Under Other Employer's Plan	