

State of California

MEMORANDUM

To: PERSONNEL MANAGEMENT LIAISONS

Date: January 10, 1992

Reference Code: 92-07

THIS MEMORANDUM SHOULD BE DISTRIBUTED TO:

ALL PERSONNEL OFFICERS, PERSONNEL TRANSACTIONS
SUPERVISORS AND PERSONNEL TRANSACTIONS STAFF

From: Department of Personnel Administration

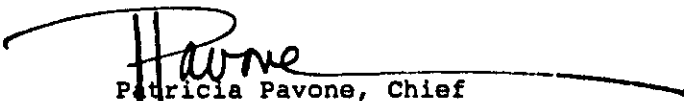
Subject: Revised 1992 FlexElect Permitting Event Code Chart

The purpose of this memo is to provide information concerning the FlexElect permitting event codes for the 1992 FlexElect Plan Year.

A revised FlexElect Permitting Event Code Chart is attached for your use. This chart has been revised to add a new permitting event code of 99. This code should be used when a permissive addition or deletion of dependents is occurring on the FlexElect participant's health plan and/or dental plan, which only results in a change to the party code. In other words, if a FlexElect participant only wants to add or delete dependents on their health or dental plan, and it is permissible under PERS for health and DPA for dental, it will also be permissible under the FlexElect rules. The appropriate permitting event code to use on the STD-701 for this event is Code 99. On the HBD-12 and STD-692, you should continue to use the appropriate permitting event code as listed in the Health Benefits and/or Dental Benefits Procedure Manuals.

If an employee is requesting an allowed action as the result of a permitting event which is listed on the FlexElect Permitting Event Code Chart AND, in addition, wishes to add or delete dependents, Permitting Event Code 99 is not required. In this instance, the dependents should be added or deleted with the appropriate FlexElect Permitting Event Code for the specific action.

To assist in the timely processing of submitted FlexElect packages, please continue to use the Remarks Section on all submitted enrollment forms, i.e., HBD-12, STD-692 and STD-701. The Remarks Section should be completed to provide additional information in order to clarify the action being taken. All documents for Flex participants which do not require DPA approval should be submitted as a package and forwarded to SCO for processing. Where appropriate SCO will forward the HBD-12 to PERS. If you have any questions regarding this information you may contact Janice Yates at (916) 324-0535 or ATSS 454-0535.


Patricia Pavone, Chief
Benefits and Training Division

Attachment



F L E X I E L E C T
PERMITTING EVENT CODES/DATES

EFFECTIVE DATES:

STANDARD

- first of the following month when correctly completed document is received at SCO by the 10th AND does not have to be returned to the agency for correction.

MANDATORY

- first of the month following the event.

<u>PERMITTING EVENT</u>	<u>ACTION ALLOWED</u>	<u>PERMITTING EVENT CODE</u>	<u>PERMITTING EVENT DATE</u>	<u>EFFECTIVE DATE OF ACTION</u>	<u>TIME LIMIT TO FILE DOCS</u>
Initial Appointment	May Enroll As Newly Eligible	01	Appointment Date	Standard	60 days after date of event
Perm-Intermittent Initial Appointment	May enroll in Pre-Tax	04	Appointment Date	August 1	60 days after date of event
Loss of, or commencement of, spouse's employment or Loss of spouse's medical/dental coverage	May enroll, or if currently enrolled cancel/change Flex elections, re-enroll in prior medical/dental plan(s)	05e	Date of Event	Mandatory	60 days after date of event
Commencement of spouse's medical/dental coverage or procuring independently maintained coverage	If currently enrolled cancel/change medical reimbursement account (New enrollments not allowed)	05f	Date of Event	Standard	60 days after date of event
Change of custody of child or adding child who is economically dependent on employee	If currently enrolled cancel/change reimbursement account(s) (New enrollments not allowed)	16	Date of Event	Standard	60 days after date of event

<u>PERMITTING EVENT</u>	<u>ACTION ALLOWED</u>	<u>PERMITTING EVENT CODE</u>	<u>PERMITTING EVENT DATE</u>	<u>EFFECTIVE DATE OF ACTION</u>	<u>TIME LIMIT TO FILE DOCS</u>
Newly acquired spouse/ stepchild to a 1 party enrollment	May enroll, or if currently enrolled cancel/change Flex elections	17	Date of Event	Standard	60 days after date of event
Newborn/adopted child to a 1 party enrollment	May enroll, or if currently enrolled cancel/change Flex elections	19	Date of Event	Mandatory	60 days after date of event
Newly acquired spouse/ stepchild to a 2 or 3 party enrollment	May enroll, or if currently enrolled cancel/change Flex elections	21	Date of Event	Standard	60 days after date of event
Newborn/adopted child to a 2 or 3 party enrollment	May enroll, or if currently enrolled cancel/change Flex elections	22	Date of Event	Mandatory	60 days after date of event
Child entering military service	If currently enrolled cancel/change reimbursement account(s) (New enrollments not allowed)	26a	Date of Event	Standard	60 days after date of event
Marriage of child	If currently enrolled cancel/change reimbursement account(s) (New enrollments not allowed)	26b	Date of Event	Mandatory	60 days after date of event

<u>PERMITTING EVENT</u>	<u>ACTION ALLOWED</u>	<u>PERMITTING EVENT CODE</u>	<u>PERMITTING EVENT DATE</u>	<u>EFFECTIVE DATE OF ACTION</u>	<u>TIME LIMIT TO FILE DOCS</u>
Death of child (Mandatory deletion from medical/dental plan)	If currently enrolled cancel/change reimbursement account(s) (New enrollments not allowed)	26c	Date of Event	Mandatory	60 days after date of event
Child attains age 23 (Mandatory deletion from medical/dental plan)-Unless disabled-	If currently enrolled cancel/change reimbursement account(s) (New enrollments not allowed)	26d	Date of Event	Mandatory	60 days after date of event
Divorce	May enroll, or if currently enrolled cancel/change Flex elections, re-enroll in prior medical/ dental plan(s)	27a	Date of Event	Mandatory	60 days after date of event
Death of Spouse	May enroll, or if currently enrolled cancel/change Flex elections, re-enroll in prior medical/ dental plan(s)	27b	Date of Event	Mandatory	60 days after date of event
Medical/Dental Plan no longer available	If currently enrolled cancel, change medical/ dental plan(s), change reimbursement account(s) (New enrollments not allowed)	33	Date of Event	Standard	60 days after date of event



<u>PERMITTING EVENT</u>	<u>ACTION ALLOWED</u>	<u>PERMITTING EVENT CODE</u>	<u>PERMITTING EVENT DATE</u>	<u>EFFECTIVE DATE OF ACTION</u>	<u>TIME LIMIT TO FILE DOCS</u>
Move out of group practice plan service area (YOU MAY NOT CHANGE MEDICAL/DENTAL PLANS IF YOUR PLAN IS STILL AVAILABLE)	If currently enrolled cancel/change Flex elections (New enrollments not allowed)	34	Date of move into an area which is not covered by the the current carrier	Standard	31 days prior to move; no limit after move
Loss of SB 2465 Subsidy and Subsequent Change of Health Plan	If currently enrolled may change health plan. May cancel or decrease medical reimbursement account	35	Date of Event	Date of enrollment in new health plan	Time limit does not apply
Change in employee's or spouse's employment status (i.e. NDI leave; switch from full time to part time)	If currently enrolled cancel, decrease reimbursement account(s) (New enrollments not allowed)	37	Date of Event	Standard	60 days after date of event
Employee change in bargaining unit or employee designation (due to transfer, promotion, etc.)	If currently enrolled change medical/dental plan(s) per union requirements. Delta Dental enrollee's may change from basic to enhanced or vice-versa (New enrollments not allowed)	40	Date of Event	Standard	Time limit does not apply
PI-Cancellation due to loss of eligibility or valid family status change	Cancel Flex Enrollment	41	Date of Event	Mandatory	Time limit does not apply

PERMITTING EVENT

Permissive additions or deletions of dependents on Health Plan or Dental Plan.

ACTION ALLOWED

May change party code number in Flex Health Plan or Flex Dental Plan*

PERMITTING
EVENT CODE

99

PERMITTING
EVENT DATE

Date of Event

EFFECTIVE DATE
OF ACTION

Standard

TIME LIMIT
TO FILE DOCS

Same time limit applied to related Health or Dental transaction

*If employee is taking an action as allowed by the permitting event code chart, and in addition, wishes to change the party code on their health or dental plan, Permitting Event Code 99 is not required.