

FlexElect Program Permitting Event Codes/Effective Dates

Effective Dates: **Standard** First of the following month when correctly completed enrollment form 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.

Newly Eligible Enrollments Not Currently Enrolled in Any FlexElect Option

Permitting Event Newly eligible due to the following:	Action Allowed	Permitting Event Code	Permitting Event Date	Effective Date of Action	Time Limit to File Document
<ul style="list-style-type: none"> – Initial appointment (includes reinstatement following a permanent break in service) – Change in time base/designation from one that was not eligible to one that is or a PI who changes to a permanent position with a time base of half-time or more – Marriage – Divorce, legal separation, or annulment – Death of a spouse – Return from an approved leave of absence (if employee was on an approved leave during the entire open enrollment period) or if the leave is concurrent to a valid change in status (e.g., birth of child/maternity leave) after the employee returns to work 	May newly enroll	01	Date of event	Standard*	60 days after date of event
<ul style="list-style-type: none"> – Loss or commencement of spouse's or domestic partner's employment 	May newly enroll in reimbursement accounts. No new cash enrollment allowed	01a	Date of event	Standard*	60 days after date of event
<ul style="list-style-type: none"> – Change in provider dependent care cost (only when provider is not a relative) – Change in physical custody of child – Change in dependent care provider 	May newly enroll in Dependent Care Reimbursement Account	01b	Date of event	Standard*	60 days after date of event
<ul style="list-style-type: none"> – Birth, adoption, or child placed for adoption, newly acquired dependent 	May newly enroll in reimbursement account(s)	01c	Date of event	Standard*	60 days after date of event
<ul style="list-style-type: none"> – Commencement of medical/dental coverage provided through spouse, domestic partner, or other source (due to an employment status change) 	May newly enroll in Cash Option	01d	Date of event	Standard*	60 days after date of event

* The last possible effective date for enrollment as newly eligible is December 1. Correctly completed documents must be received at SCO by November 10.

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Changes in Status Events

Participants Currently Enrolled in One or More FlexElect Options

Permitting Event	Action Allowed	Permitting Event Code	Permitting Event Date	Effective Date of Action	Time Limit to File Document
Loss or commencement of spouse's or domestic partner's employment	Cancel/change Flex elections	05d**	Date of event	Standard	60 days after date of event
Loss of medical/dental coverage provided through spouse, domestic partner, or other source (due to an employment status change)	If currently enrolled in the Cash Option, must cancel/change Cash Option elections. (New enrollments not allowed)	05e**	Date of event	Mandatory	60 days after date of event
Commencement of medical/dental coverage provided through spouse, domestic partner, or other source (due to an employment status change)	Cancel/enroll/change Cash Option elections	05f**	Date of event	Standard	60 days after date of event
Change of physical custody of child	Cancel/enroll/change Dependent Care Reimbursement account	16a	Date of event	Standard	60 days after date of event
Newly married	Cancel/enroll/change Flex elections	17**	Date of event	Standard	60 days after date of event
Birth, adoption, or child placed for adoption	Enroll/increase reimbursement account(s)	22	Date of event	Mandatory	60 days after date of event
Child entering military service	May cancel/decrease reimbursement account(s) (New enrollments not allowed)	26a	Date of event	Standard	60 days after date of event

** For employees cancelling the FlexElect Cash and enrolling into a state health and/or dental plan, the cancellation date for the FlexElect Cash enrollment **must** be the first of the month following the loss or cancellation of coverage.

FlexElect Program Permitting Event Codes/Effective Dates

Changes in Status Events

Participants Currently Enrolled in One or More FlexElect Options Continued

Permitting Event	Action Allowed	Permitting Event Code	Permitting Event Date	Effective Date of Action	Time Limit to File Document
Marriage of child	Cancel/decrease reimbursement account(s) (New enrollments not allowed)	26b	Date of event	Mandatory	60 days after date of event
Death of dependent (other than spouse)	Cancel/decrease reimbursement account(s) (New enrollments not allowed)	26c	Date of event	Mandatory	60 days after date of event
Child attains age 26 (Mandatory deletion from medical/dental plan unless disabled)	Cancel/change Flex accounts(s) (New enrollments not allowed)	26d	Date of event	Mandatory	60 days after date of event
Child attains age 13	May cancel/decrease Dependent Care Reimbursement Account (New enrollments not allowed)	26h	Date of event	Mandatory	60 days after date of event
Divorce, legal separation, or annulment	Cancel/change Flex elections, reenroll in prior medical/dental plan(s)	27a**	Date of event	Mandatory	60 days after date of event
Death of spouse or domestic partner	Cancel/enroll/change Flex accounts.	27b	Date of event	Mandatory	60 days after date of event

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Changes in Status Events

Participants Currently Enrolled in One or More FlexElect Options Continued

Permitting Event	Action Allowed	Permitting Event Code	Permitting Event Date	Effective Date of Action	Time Limit to File Document
Move out of group practice plan service area	May enroll in a new plan if your plan is no longer available. May change/cancel Cash. May not change reimbursement account(s) (New enrollments not allowed)	34**	Date of move into an area not covered by the current carrier	Standard	31 days prior to move; no limit after move
New health and/or dental plan(s) in area, plan(s) not previously available	If currently enrolled in a medical and/or dental plan, may change coverage. May cancel or change Cash Option. May not change reimbursement account(s) (New enrollments not allowed)	35**	Date of event	Standard	60 days after date of event
Change in employee's or spouse's work schedule (e.g., FMLA, NDI leave, IDL, time base change or reduction of hours that results in a loss or gain of eligibility and coverage, commencement or return from an unpaid leave of absence, separation, etc.) or worksite	Must cancel/change Dependent Care Reimbursement Account (New enrollments not allowed)	37***	Date of event	Mandatory	60 days after date of event

** For employees cancelling the FlexElect Cash and enrolling into a state health and/or dental plan, the cancellation date for the FlexElect Cash enrollment **must** be the first of the month following the loss or cancellation of coverage.

***First of the second month following the date of the event.

FlexElect Program Permitting Event Codes/Effective Dates

Changes in Status Events

Participants Currently Enrolled in One or More FlexElect Options Continued

Permitting Event	Action Allowed	Permitting Event Code	Permitting Event Date	Effective Date of Action	Time Limit to File Document
Change in dependent care provider	May cancel/enroll/change Dependent Care Reimbursement Account	38	Date of event	Standard	60 days after date of event
Change in provider dependent care cost	May cancel/enroll/change Dependent Care Reimbursement Account (only if the provider is not a relative)	39	Date of event	Standard	60 days after date of event
Employee change in bargaining unit or employee designation (due to transfer, promotion, etc.) that results in a loss or gain of eligibility for FlexElect	Change medical/dental plan(s) and/or change/cancel cash option elections per union requirements (New enrollments not allowed)	40**	Date of event	Standard	Time limit does not apply
Change in time base and/or appointment that results in a loss of FlexElect eligibility and coverage	Must cancel Flex election(s)	41	Date of event	See *** below	Time limit does not apply
2020 Plan year one-time exception due to National Emergency	May cancel/enroll/change Medical Reimbursement Account or Dependent Care Reimbursement Account	42	Employee signature date	Standard****	Time limit does not apply
Retiree enrolls in health and/or dental plan up to 30 days prior to retirement	Cancel Flex enrollment and reenroll in a health and/or dental plan(s)	88	Date HBD 12 (or STD 692) is received by the agency	Mandatory	30 days prior to retirement

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***First of the second month following the date of the event.

****The last possible effective date is December 1, 2020. Correctly completed documents must be received at SCO by November 10, 2020.