



For Office Use Only:

Agr. I.D. # _____

HealthFlex Enrollment/Change Form

New hires and newly eligible participants must provide complete information on each eligible dependent. Enrolled participants making changes should provide only the information that has changed. If you wish your mail to go to a different address, please see Part 9.

Part 1 – Plan Sponsor Information

Participant name _____ Social Security # _____

Legal address _____ Primary phone # _____

_____ Alternate phone # _____

Marital status: Single Married Divorced Widowed Effective date of marital status _____

Conference/Plan sponsor/Employer(s) _____ Employer(s) # _____

Membership: Clergy Lay Date of hire _____

Appointment/Employment status _____ Effective date _____

Percentage of employment: Quarter-time Half-time Three-quarter-time Full-time

Processing event code (please use codes listed in Part 8) _____ Event date _____

Part 2 – Dependent Information

- List yourself and all eligible dependents, including your spouse, even if you are declining coverage. If you are currently enrolled and are adding/deleting a dependent, list only that dependent's information.
- Indicate whether you wish to cover yourself, your spouse and/or dependent children.
- If you are declining coverage on yourself or a dependent, indicate whether that person has other health coverage and sign Part 5. (See the letter in your enrollment packet for the description of other health coverage. Use the description of "other employer-sponsored group health coverage" if you are a retiree.)

Name	Social Security #	Birth date	Relationship	Gender	Disabled		Cover		Other Health Coverage ¹	
					Yes	No	Yes	No	Yes	No
_____	_____	_____	self	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	spouse	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	child	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

¹ For retirees and dependents of retirees, "other health coverage" means other employer-sponsored group health coverage as described in the HealthFlex Rules Regarding Retired Participants.

Part 3 – Participant Signature

I attest that the above participant information is true to the best of my knowledge. In addition, if I am an active participant, I have received, read and I understand the HIPAA Notice of Special Enrollment Rights, the HIPAA Notice of Pre-existing Condition Exclusion and the HIPAA Notice of Privacy Practices, which are included in my New-hire Enrollment Kit.

Participant signature _____ Date _____

Part 4 – Plan Sponsor Authorization of Enrollment/Change

Plan sponsor signature _____ Date _____

Part 5 – Declination of Coverage

If you are declining to cover yourself or any eligible dependents, it is important you understand certain plan rules. By declining coverage, you are declining coverage for the balance of the current plan year, and all subsequent plan years unless you enroll for such coverage during a subsequent annual election period for coverage commencing on the following January 1. Also, any persons for whom coverage is being declined will be subject to late entrant provisions under the plans, which include possible benefit limitations on pre-existing conditions. In certain circumstances, you may be able to enroll for coverage for yourself or eligible dependents prior to a subsequent annual election period. These circumstances include marriage, birth, adoption or legal guardianship, or loss of other health insurance as provided under the Health Insurance Portability and Accountability Act of 1996 and change of status rules under HealthFlex. If you understand the above and still wish to decline coverage for yourself or any eligible dependents, indicate whether those eligible persons for whom you are declining coverage currently have other health coverage in Part 2, and sign on the line immediately below.

Once you are covered as a retired participant, you must maintain continuous coverage in the plan. If you terminate coverage for any reason, at any time while a retired participant, you will **permanently** lose eligibility to return to HealthFlex. Your spouse and dependents are subject to the same one-time election rule and other eligibility rules of your plan sponsor.

At the time of your retirement, you may postpone HealthFlex coverage for you and your eligible dependents if and only if you have other employer-sponsored group health coverage. If you wish to decline coverage for yourself or any eligible dependent, indicate whether the eligible persons for whom you are declining coverage currently have other employer-sponsored group health coverage in Part 2, and sign on the line immediately below.

Participant signature _____ Date _____

Part 6 – Retirees Only

No change in information from previous *HealthFlex Enrollment/Change* form (for retirement HealthFlex benefit enrollment purposes only).

Part 7 – Default Rules for Retirees

If you do not complete and return this form to your plan sponsor, you are deemed to have refused coverage in retirement and you forfeit your eligibility under the plan.

Part 8 – Event Codes

	Event	Event Name
New Enrollment	1	New hire
	2	Newly eligible
	5	Special enrollment/new dependent
	6	Special enrollment/divorce
	7	Special enrollment/spousal death
	8	Special enrollment/spouse loses other coverage
Add Dependent for Covered Participant	3	New dependent
	4	Spouse loses other coverage
Delete Dependent for Covered Participant	9	Divorce
	14	Spouse gains other coverage
	17	Dependent child ineligible

	Event	Event Name
Death	33	Participant death
	34	Retiree death
	37	Dependent death
Termination	31	Declines coverage/non-payment
	36	Participant losing eligibility
Others	10	New Retiree
	11	Divorced spouse/legal decree
	21	Regaining eligibility/same plan year
	30	Late enrollment/annual election
	32	Retiree to active
	35	Continuation

Part 9 – Preferred Mailing Address

Mailing address _____

Part 10 – Additional Dependents

Name	Social Security #	Birth date	Relationship	Gender	Disabled		Cover		Other Health Coverage ²	
					Yes	No	Yes	No	Yes	No
_____	_____	_____	self	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	spouse	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	child	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

² For retirees and dependents of retirees, “other health coverage” means other employer-sponsored group health coverage as described in the *HealthFlex Rules Regarding Retired Participants*.