CSU The California State University

# DEPENDENT CARE/HEALTH CARE REIMBURSEMENT ACCOUNT PLANS ENROLLMENT AUTHORIZATION

**Please type or print clearly with ballpoint pen. Return completed form to campus Benefits Officer.**

**SEE PRIVACY NOTICE ON REVERSE OF EMPLOYEE COPY**

1. TYPE OF ENROLLMENT (Check appropriate box)
   - ☒ OPEN ENROLLMENT ☐ NEW ENROLLMENT
   - ☐ CHANGE DUE TO PERMITTING EVENT (i.e., Change in Status)
   - ☐ CANCELLATION

2. SOCIAL SECURITY NO.

3. MARITAL STATUS ☐ Married ☐ Single

4. NAME (first) (initial) (last)

5. REIMBURSEMENT PLAN ELECTIONS: To establish a Dependent Care (DCRA) and/or Health Care Reimbursement Account (HCRA), enter the amount you want to have deducted EACH month on a pre-tax basis from your pay warrant. **The minimum monthly pre-tax deduction amount for each account is $20.00, up to a maximum of $254.16 for HCRA ($3,050 annual maximum) and $416.66 for DCRA ($5,000 annual maximum), as allowed by the Plan.**

*For HCRA participants only: All new enrolling participants will automatically receive a set of two ASI Debit Cards which can be used to pay for qualifying expenses.*

| Benefit Deduction Item (Pre-Tax) | 6. DED/ORG Code | 7. Monthly Deduction Amount | SCO Use Only |
|---|---|---|---|
| **Dependent Care Reimbursement Account (DCRA) Employee Initial here ____ Please note: This plan is for eligible dependent day care related expenses only** | 380-037 | A. $ _____. ___ | |
| **Health Care Reimbursement Account (HCRA) Employee Initial here ____ Please note: This plan is for eligible health care related expenses only** | 378-037 | B. $ _____. ___ | |

8. Coverage Statement

**I UNDERSTAND THAT MY ENROLLMENT INTO THE DEPENDENT CARE AND/OR HEALTH CARE REIMBURSEMENT ACCOUNT PLAN(S) IS FOR ONE PLAN YEAR AT A TIME – MY ENROLLMENT WILL NOT AUTOMATICALLY RENEW. IF I WISH TO CONTINUE ENROLLMENT FOR THE NEXT PLAN YEAR, I MUST RE-ENROLL ANNUALLY DURING OPEN ENROLLMENT.**

I hereby agree to have my monthly pay reduced on a pre-tax basis by the amount(s) specified above. I understand that IRS regulations require that my monthly pre-tax deductions authorized by this form are irrevocable during this plan year, unless I experience an allowable "change in status event," as defined in these regulations and described in the Dependent Care and/or Health Care Reimbursement Account brochure(s).

This reduction in pay is effective with the December pay period (January pay warrant), unless this is a mid-year enrollment, and will continue for each succeeding pay period until the end of the Plan Year. My agreement to have my pay reduced is made on the condition that the CSU contribute the amounts from my pay warrant to the Reimbursement Account(s) that I have specified on this form.

Each Plan Year begins on January 1 and ends December 31. I understand that requests for reimbursement must be for eligible services/supplies incurred between the effective dates of my participation in the Plan(s) through the end of the Plan Year, or the following 2 ½ month grace period extension (January 1 – March 15) if I am enrolled in the Plan(s) through December 31. All reimbursement requests for the current Plan Year must be postmarked by June 30 of the following Plan Year in order to be reimbursed. I further understand that any unclaimed amount remaining in my Dependent Care and/or Health Care Reimbursement Account(s) after that date will be forfeited.

I have read the above statements and agree to the terms and conditions of the Dependent Care and/or Health Care Reimbursement Account(s) Plan(s) as specified on this form and described in the applicable brochure(s).

**Employee's Signature**: ▶ **Date Signed**: ▶

**FOR CAMPUS HR OFFICE USE ONLY**

| 9. Effective Date of Action Mo | Day | Year | 10. Employee CBID | 11. Permitting Event Date Mo | Day | Year | 12. Permitting Event Code |
|---|---|---|---|---|---|---|---|
| 01 | -1- | 2024 | | 09 | 18 | 2023 | 00 |

13. Remarks:

Open Enrollment

| 14. Agency Code | 15. Unit Code | 16. Campus Name |
|---|---|---|
| 226 | | CSU-Monterey Bay |

17. Authorized Campus Signature

I hereby certify under penalty of perjury as follows: That I am the duly appointed, qualified and acting officer of the herein named agency and that I am authorized to make this certification; that the employee named herein is eligible for enrollment in the CSU HCRA and/or DCRA Plan(s).

Print Name: Terri Giroux

E-mail address: tgiroux@csumb.edu

Signature: ▶

18. Date Received:

19. Telephone Number: 831-582-4426

**DISTRIBUTION**: **ORIGINAL -** State Controller's Office **COPY** – Campus **COPY W/PRIVACY NOTICE** – Employee

REV. 07/2023 – Plan Year 2024 or later

**The California State University**
**DEPENDENT CARE/HEALTH CARE REIMBURSEMENT ACCOUNT PLANS**
**ENROLLMENT AUTHORIZATION**
(REV. 07//2022) (REVERSE)

PRIVACY NOTICE

The Information Practice Act of 1977 (Civil Code Section 1798.17) and the Federal Privacy Act (Public Law 93-579) require that this notice be provided when collecting personal information from individuals.

Information requested on this form is used by the State Controller's Office and the program administrator, for the purposes of identification and account processing.

It is mandatory to furnish all information requested on this form except for employee's gender and marital status, which may be furnished on a voluntary basis. Failure to provide the mandatory information may result in the DCRA and/or HCRA enrollment action(s) not being processed or being processed incorrectly.

The State Controller's Office requires the employee's social security number and name for identification purposes. Legal references authorizing maintenance of this information include Government Code Sections 1151 and 1153, Sections 6011 and 6051 of the Internal Revenue Code, and Regulation 4, Section 404.1256, Code of Federal Regulations, under Section 218, Title II of the Social Security Act.

Information provided on the form will be forwarded to the Claims administrator. Copies of the Dependent Care/Health Care Reimbursement Account Plan(s) Enrollment Authorization Form(s) are maintained in confidential files of the State Controller's Office for five years. Employees have the right of access to copies of their Dependent Care and/or Health Care Reimbursement Account Plan(s) Enrollment Authorization forms upon request. The official responsible for the maintenance of the forms is: Chief of Personnel/Payroll Operations Bureau, State Controller's Office, P. O. Box 942850, Sacramento, California 94250-5878, Attention: Benefits Unit.