



EMPLOYEES RETIREMENT SYSTEM OF TEXAS TEXTFLEX ENROLLMENT/CHANGE FORM

Information provided to ERS is maintained for managing your benefits. If you have questions about your information, or believe that information provided to ERS may be incorrect, please notify ERS.

You may complete your benefits election either by:

- using your online account at www.ers.texas.gov, or
- sending this completed form to your benefits coordinator or, for HHS Enterprise employees, the HHS Employee Service Center.

Only for participants with active employee benefits.

SECTION A: EMPLOYEE DATA

Employee Name:	SSN	ERS Employee ID
Type of employee: 9-month (higher education institutions)	12-month	

SECTION B: ACTION AND REASON CODE (Check only one box.)

FSC Family Status Change RED Reduction while on LOA	HIR New Hire RFL Return from Leave	REH Rehire DTA FTE to PTE/PTE to FTE	PHC Post Hire Change LOA Leave of Absence
Enter a reason code and event date if you checked the FSC box above. See the Family Status Change (FSC) Reference Chart on page 3 before completing.			
Reason Code:		Event Date: (mm-dd-yyyy)	

SECTION C: TEXTFLEXSM HEALTH CARE FLEXIBLE SPENDING ACCOUNT (FSA) (Fill out only one of the three options in this section, if applicable.)

TexFlex health care flexible spending account (FSA) – for eligible medical, vision and dental out-of-pocket costs excluding insurance premiums. Program has a minimum annual pledge of \$180 and a maximum annual pledge of \$3,300 per tax year. Enrollment/change must be made within 31 days of your employment or qualifying life event. You will receive a TexFlex debit card, at no cost, to pay for eligible expenses. There is no annual administrative fee for the TexFlex health care FSA. **Note:** If you do not check this box, you will not be enrolled in this account.

OPTION 1: NEW ENROLLMENT (Complete only if New Hire/Rehire or Family Status Change.)	
I want my monthly deduction to be (not to exceed \$275 per month):	\$.00
Number of months left in the plan year (September 1 – August 31):	x
Annual pledge:	\$.00
OPTION 2: INCREASE PLEDGE AMOUNT (Complete only if increasing pledge amount due to a Family Status Change.)	
Current annual pledge amount:	\$.00
Increase my annual pledge amount to:	\$.00
OPTION 3: REDUCTION (Complete only if reducing pledge amount due to a Family Status Change.)	
Current annual pledge amount:	\$.00
Reduce my annual pledge amount to:	\$.00

SECTION D: TEXTFLEX DEPENDENT CARE FLEXIBLE SPENDING ACCOUNT (FSA) (Fill out only one of the three options in this section, if applicable.)

TexFlex dependent care FSA – for eligible child or adult dependent care expenses. Program has a minimum annual pledge of \$180 and a maximum annual pledge of \$5,000 or the lesser of your spouse's or your annual income that is below \$5,000.* see Authorization section Enrollment/change must be made within 31 days of your employment or qualifying life event. The TexFlex debit card is not available to pay for dependent care expenses. There is no annual administrative fee for the TexFlex dependent care FSA. **Note:** If you do not check this box, you will not be enrolled in this account.

OPTION 1: NEW ENROLLMENT (Complete only if New Hire/Rehire or Family Status Change.)	
I want my monthly deduction to be (not to exceed \$416 per month):	\$.00
Number of months left in the plan year (September 1 – August 31):	x
Annual pledge:	\$.00
OPTION 2: INCREASE PLEDGE AMOUNT (Complete only if increasing pledge amount due to a Family Status Change.)	
Current annual pledge amount:	\$.00
Increase my annual pledge amount to:	\$.00
OPTION 3: REDUCTION (Complete only if reducing pledge amount due to a Family Status Change.)	
Current annual pledge amount:	\$.00
Reduce my annual pledge amount to:	\$.00

SECTION E: TEXFLEX LIMITED-PURPOSE FLEXIBLE SPENDING ACCOUNT (FSA)

(Fill out only one of the three options in this section, if applicable.)

Enrollment in the TexFlex limited-purpose flexible spending account (FSA) is only applicable if you are enrolled in Consumer Directed HealthSelectSM.

TexFlex limited-purpose FSA – for eligible dental and vision out-of-pocket costs excluding healthcare costs. Program has a minimum annual pledge of \$180 and a maximum annual pledge of \$3,300 per tax year. You must enroll or make any changes within 31 days of your employment or qualifying life event. You will receive a TexFlex debit card, at no cost, to pay for dental and vision expenses. There is no annual administrative fee for the TexFlex limited-purpose FSA. Note: If you do not check this box, you will not be enrolled in this account.

OPTION 1: NEW ENROLLMENT (Complete only if New Hire/Rehire or Family Status Change.)

I want my monthly deduction to be (not to exceed \$275 per month): \$.00

Number of months left in the plan year (September 1 – August 31): x

Annual pledge: \$.00

OPTION 2: INCREASE PLEDGE AMOUNT (Complete only if increasing pledge amount due to a Family Status Change.)

Current annual pledge amount: \$.00

Increase my annual pledge amount to: \$.00

OPTION 3: REDUCTION (Complete only if reducing pledge amount due to a Family Status Change.)

Current annual pledge amount: \$.00

Reduce my annual pledge amount to: \$.00

Authorization:

I understand my TexFlex health care, dependent care, and/or limited-purpose flexible spending account (FSA) enrollment is a designation for the entire plan year, unless I terminate employment or retire. I understand I cannot make prospective enrollment changes during the current plan year without a qualifying life event (QLE).

*I understand if I am a highly compensated individual based on IRS definitions and I elect to enroll in the TexFlex Dependent Care flexible spending account (FSA), the maximum amount I can elect is lowered to \$1,250 each year.

I understand I may be asked to provide receipts or an Explanation of Benefits (EOB) for purchases made using the TexFlex debit card in accordance with IRS regulations. If I fail to provide the required substantiation, my card may be suspended and I will not be able to use it for future purchases. I will, however, have access to file manual claims for reimbursement.

I authorize payroll deductions for the amount listed on this form.

I understand I have until August 31 to incur eligible health care expenses for the plan year and can carry over the unused funds within the IRS-allowed limit in my TexFlex health care FSA balance to the next plan year. I understand that I will forfeit any unused funds over the IRS-allowed carryover limit.

I understand I have until August 31 to incur eligible dental or vision expenses for the plan year and can carry over the unused funds within the IRS-allowed limit in my TexFlex limited-purpose FSA balance to the next plan year. I understand that I will forfeit any unused funds over the IRS-allowed carryover limit.

I understand I have until November 15 of the following plan year (that is, through the current plan year and the following Sept. 1 – Nov. 15 grace period) to incur eligible dependent care expenses for the plan year. The unused funds from my TexFlex dependent care FSA do not carry over past the grace period, and I will forfeit any unused funds.

I must file all eligible claims by December 31 of the associated plan year for reimbursement.

I understand that TexFlex account eligibility, enrollment and benefits information is available from my employer and at **www.ers.texas.gov**. I certify that I have read and agree to all of the conditions and participation rules for this program.

Sign: _____ Date: _____

Family Status Change (FSC) Reference Chart

A qualifying life event (QLE) is an eligible event that allows you to change your enrollment elections within 31 days of that event. The following are QLEs that correspond with a particular change in your employment or family status. Remember, rules will determine if you can enroll in or make your requested changes.

Event	Qualifying Life Event (QLE) Example	Reason
Employee Marital Status Change	Participant gets married	MAR
	Participant gets a divorce or an annulment	DIV
	Death of a spouse	DOD
Dependent Status Change	Birth of a newborn child	BIR
	Participant adopts, fosters, or gets court-appointed guardianship of child	ADP
	Participant gains or loses dependents through death	DOD
	Dependent becomes eligible or loses eligibility for insurance coverage (Example: Participant's spouse is covering their child. The child lost eligibility for the spouse's insurance because the child does not attend school.)	DEP
	Dependent is related by blood or marriage, and was previously claimed on the participant's income tax return, but is no longer eligible to be claimed on participants income tax return	XMO
	Child gets married	DGM
Employment Status Change	Participant/Dependent employment status change	ESC
	Dependent becomes eligible for insurance after a waiting period	DWP
Address Change that Changes Dependent Eligibility	Dependent moves out of health or dental plan service area	DMV
Medicare/Medicaid/CHIP Eligibility Change	Participant/Dependent gains Medicare/Medicaid/CHIP eligibility	MDG
	Participant/Dependent loses Medicare/Medicaid/CHIP eligibility	MDL
Significant Change in Cost/Coverage Imposed by Third Party	Significant change in cost by dependent care provider	SCC
	Significant change in cost/coverage of dependent's health or dental plan (excluding GBP)	SCC
	HIPP approval or loss of eligibility	SCC
Office of the Attorney General (OAG) - Ordered Coverage Change (Eligibility rules apply for these dependents)	Participant gains requirement to provide coverage for child through a National Medical Support Notice (NMSN) issued by the Office of the Attorney General (OAG) (Example: employee receives an NMSN to provide health coverage for his child.)	MSO
	Expiration of an NMSN, which is issued by the OAG and requires a participant to provide coverage for a child. (Example: employee's NMSN to provide health coverage for his child expires and the employee is no longer required to continue coverage for the child.)	MSD*
*Employees must contact their benefits coordinator (HHS Enterprise employees contact HHS Employee Service Center) to drop dependents added with a NMSN.		
Benefit changes must be consistent with the QLE. Dependent eligibility and enrollment rules apply.		