

# Austin Independent School District



## Qualifying Event Instructions for Employee Benefit Plan Changes during the Plan Year (outside of open enrollment)

Austin ISD Benefit Plan is a Section 125 Flexible Benefit Plan (Cafeteria Plan) allowed for under the regulation of Section 125 of the Internal Revenue code.

**RULES:** Any “pre-tax” elections will remain in effect and **cannot** be revoked or changed during the Plan Year unless there is a qualifying event.

**TIMELINE:** Any change in benefit election must be made with **31 days** of the qualifying event and must be consistent with the change that has occurred.

**SUPPORTING DOCUMENT REQUIRED TO ENROLL/CANCEL COVERAGE:**

Documentation of the qualifying event, a Section 125 Revocation/Change Form, subsequent carrier and dependent verification documentation must be submitted to the Benefits Department within **31 calendar days** (including weekends and holidays) of the qualifying event date. *(NOTE: All documents faxed or emailed are considered by the time stamp when they were sent whether office is closed or open)*

**Benefits Department**

1111 W. 6<sup>th</sup> Street, Suite A330  
Austin, Texas 78703-5338

512-414-1739 (phone)  
512-414-9976(fax)

Example of Qualifying Event	Required Supporting Documentation
Birth of a child	Birth Certificate Verification of the birth from the hospital or other authority listing the name and the date of birth of the child
Adoption	Placement for adoption paperwork, legal documentation of the adoption
Death	Death Certificate
Marriage	Marriage Certificate
Divorce	Original signed divorce decree
Dependent’s enrollment in another employer’s benefits through job change or open enrollment	Proof of the enrollment listing: effective date of coverage, type of coverage (medical, dental, vision), and the names of dependents enrolled with their effective date of coverage. Examples: copy of enrollment forms or printouts from an on-line enrollment
Loss of benefits due to loss of job or loss of eligibility	Letter from former employer, COBRA notice, or print screens from insurance carriers listing the type of coverage lost, the last date of coverage and the names of dependents losing coverage

*Note: Switching among plans during the plan year is prohibited. When adding dependents they are added to current plan that employee is participating in.*

**EFFECTIVE DATES:** Day after benefits end when situation is a loss of benefits. Benefits become effective the date of the event for: births, adoptions, marriages, divorce, and death

**PREMIUM DEDUCTIONS:** AISD premium deductions are deducted from employee paycheck one month in advance. Double premium payments may be due based on effective date. Premiums are not pro-rated. Example of this: A child is born on the 10<sup>th</sup> of December; insurance premiums for December and January will be deducted from the December pay check if forms are returned within the payroll deadline.