



Southwestern University 2026
Benefits New Employee/
Change Form For Monthly Paid
Employees

2026
Monthly

Employee Information		<input type="checkbox"/> Check box if New Address or Phone	
Employee Name: (Last, First, Middle) Please Print	Social Security #:	Email:	
_____	_____-_____-_____	_____	
Phone: _____	Date of Birth: (mm/dd/yyyy) Marital Status <input type="checkbox"/> Single <input type="checkbox"/> Married		
Address: (Street, City, State, Zip Code)	_____		
_____	_____		
_____	<input type="checkbox"/> Male <input type="checkbox"/> Female		
	HR Use Only	Monthly Contribution	
	CONT		

Reason for Completing This Form (This change form & required documentation must be submitted to Human Resources within 30 days of qualifying event.)		
<input type="checkbox"/> Open Enrollment	<input type="checkbox"/> Death of Spouse or Dependent	<input type="checkbox"/> Change in Health Savings Account (HSA) Deduction Amount Only (no qualifying event required) Event Date: _____ Benefits Change Effective Date: _____
<input type="checkbox"/> New Hire	<input type="checkbox"/> Termination of other group health plan	
<input type="checkbox"/> Birth or Adoption	<input type="checkbox"/> Change in Spouse/Dependent's employment status	
<input type="checkbox"/> Divorce	<input type="checkbox"/> Qualified Medical Support Order	
<input type="checkbox"/> Marriage	<input type="checkbox"/> Return from Leave of Absence	
<input type="checkbox"/> COBRA	<input type="checkbox"/> Other _____	

Medical <input type="checkbox"/> Yes, I wish to change my medical coverage. <input type="checkbox"/> No, I do not wish to change my medical coverage. <input type="checkbox"/> Waive Coverage					
(Select ONE Dollar Amount) Note: All deductions are made on a Pre-Tax basis					Monthly Premium/Code
Plan Choice:	Employee Only	Emp + Spouse	Emp + Child(ren)	Emp + Family	
<input type="checkbox"/> High Deductible Health Plan	<input type="checkbox"/> \$0.00	<input type="checkbox"/> \$301.75	<input type="checkbox"/> \$129.22	<input type="checkbox"/> \$434.69	
<input type="checkbox"/> Base PPO Plan	<input type="checkbox"/> \$113.36	<input type="checkbox"/> \$432.13	<input type="checkbox"/> \$226.71	<input type="checkbox"/> \$625.16	
<input type="checkbox"/> Buy-Up PPO Plan	<input type="checkbox"/> \$206.89	<input type="checkbox"/> \$634.08	<input type="checkbox"/> \$387.90	<input type="checkbox"/> \$939.53	

Dental <input type="checkbox"/> Yes, I wish to change my dental coverage. <input type="checkbox"/> No, I do not wish to change my dental coverage. <input type="checkbox"/> Waive Coverage					
(Select ONE Dollar Amount) Note: All deductions are made on a Pre-Tax basis					Monthly Premium/Code
Plan Choice:	Employee Only	Emp+ Spouse	Emp + Child(ren)	Emp + Family	
<input type="checkbox"/> HUMANA PPO Low Plan (NO ortho)	<input type="checkbox"/> \$23.50	<input type="checkbox"/> \$46.98	<input type="checkbox"/> \$52.86	<input type="checkbox"/> \$ 81.05	
<input type="checkbox"/> HUMANA PPO High Plan (inc ortho)	<input type="checkbox"/> \$34.00	<input type="checkbox"/> \$67.97	<input type="checkbox"/> \$85.76	<input type="checkbox"/> \$128.55	

Vision <input type="checkbox"/> Yes, I wish to change my vision coverage. <input type="checkbox"/> No, I do not wish to change my vision coverage. <input type="checkbox"/> Waive Coverage					
(Select ONE Dollar Amount) Note: All deductions are made on a Pre-Tax basis					Monthly Premium/Code
Plan Choice:	Employee Only	Emp + Spouse	Emp + Child(ren)	Emp + Family	
<input type="checkbox"/> HUMANA Vision	<input type="checkbox"/> \$6.38	<input type="checkbox"/> \$12.74	<input type="checkbox"/> \$12.11	<input type="checkbox"/> \$19.03	

Subtotal amount to be deducted MONTHLY:
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Last name, first name, middle initial (print)

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Flexible Spending Accounts (FSA) / Health Savings Account (HSA) Election

<input type="checkbox"/>	Yes, I wish to elect a dependent care Flexible Spending Account (FSA) with a monthly contribution of : (\$7,500 annual limit/single or married if filing jointly or \$3,750 if married filing separately).	\$ _____ (DC) ^ Total ANNUAL amount
<input type="checkbox"/>	Decline dependent care flexible spending account.	
<input type="checkbox"/>	Yes, I wish to elect a medical Flexible Spending Account (FSA) with an ANNUAL contribution of: (\$3,400 annual limit). Do not choose this option if you enroll in the High Deductible Health Plan (HDHP). Amount is divided by the months employed.	\$ _____ (SA) ^ Total ANNUAL amount
<input type="checkbox"/>	Decline medical care flexible spending account.	
<input type="checkbox"/>	Yes, I wish to elect a Health Savings Account (HSA) . You must enroll in the HDHP and complete this section to elect this coverage. Southwestern University will contribute (\$75.00 single or \$150.00 employee + dependent) on a monthly contribution if you choose to elect the HDHP/High Deductible Health Plan.	\$ _____ (HSER)
<input type="checkbox"/>	In addition to what Southwestern University Contributes to my HSA, I elect a monthly contribution of: (not to exceed the annual maximum of \$4,400 for employee only (max \$3,500 employee contribution) or \$8,750 for employee + dependent (max \$6,950 employee contribution). A \$1,000 catch up contribution is available for employees age 55 and over.	\$ _____ (HSEE) ^ TOTAL each MONTH
<input type="checkbox"/>	I do NOT wish to contribute into my Health Savings Account.	

Term Life / AD&D Election and Optional Dependent Life Coverage Effective: ____/____/2026

Only new hires may elect from this form.
All others contact HR.

<input type="checkbox"/>	Yes, I wish to elect Term Life / AD&D Employee Coverage for 2 times my annual salary : Salary _____ X 2 = _____ Rounded Amount _____/1000= _____ X .167= _____/2= _____ approx prem
<input type="checkbox"/>	I Waive Term Life / AD&D Employee Coverage

Optional Life Dependent Coverage NOTE: you may not elect Optional Dependent Coverage without electing Term Life/AD&D for yourself

<input type="checkbox"/>	Yes, I wish to elect Optional Dependent Life Coverage
<input type="checkbox"/>	Option One: \$5.80 = \$25,000/\$10,000 of coverage
<input type="checkbox"/>	Option Two: \$2.40 \$10,000/\$5,000 of coverage
<input type="checkbox"/>	I Waive Optional Dependent Life Coverage

Total amount to be deducted MONTHLY:

Retirement Plan - TIAA/CREF Regular Retirement Plan 403(b)

After initial hire, changes must be made through the TIAA website

<input type="checkbox"/>	Not Eligible until after one year waiting period: Effective Date of Coverage: _____
<input type="checkbox"/>	Eligible as of : _____
<input type="checkbox"/>	ELIGIBILITY PENDING UNTIL DOCUMENTATION IS RECEIVED AND VERIFIED. _____

Family Information (Medical, Dental & Vision) Complete the following information for dependents only if you are adding or deleting dependent coverage.

A marriage Certificate is required for spouse. After initial hire, adding or dropping coverage requires proof of loss or eligibility.

Name	Add/ Drop	Sex M/F	Social Security Number	Birthdate (mm/dd/yyyy)	Married	Coverage
Spouse	<input type="checkbox"/> A <input type="checkbox"/> D	<input type="checkbox"/> M <input type="checkbox"/> F			N/A	<input type="checkbox"/> Medical <input type="checkbox"/> Dental <input type="checkbox"/> Vision <input type="checkbox"/> Life Ins
Child	<input type="checkbox"/> A <input type="checkbox"/> D	<input type="checkbox"/> M <input type="checkbox"/> F			<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Medical <input type="checkbox"/> Dental <input type="checkbox"/> Vision <input type="checkbox"/> Life Ins
Child	<input type="checkbox"/> A <input type="checkbox"/> D	<input type="checkbox"/> M <input type="checkbox"/> F			<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Medical <input type="checkbox"/> Dental <input type="checkbox"/> Vision <input type="checkbox"/> Life Ins
Child	<input type="checkbox"/> A <input type="checkbox"/> D	<input type="checkbox"/> M <input type="checkbox"/> F			<input type="checkbox"/> Y <input type="checkbox"/> N	<input type="checkbox"/> Medical <input type="checkbox"/> Dental <input type="checkbox"/> Vision <input type="checkbox"/> Life Ins

Use other side of page if more space is needed

Last name, first name, middle initial (print)

Monthly

Authorization - Including important information on HSA and FSA accounts

- I authorize Southwestern University to make periodic salary reductions from my paycheck to be deposited in my account for the election period specified above in an amount equal to the premiums required for the coverage elected above plus the specific dollar amounts, if any, elected for the Flexible Spending Accounts and/or the Health Savings Account. The salary reductions will be made in substantially equal amounts, to the extent administratively feasible. I further authorize WEX / Discovery Benefits to disburse funds from my account in accordance with the Plan and my elections.
- I further acknowledge that I must submit Reimbursement Requests to receive reimbursement from my flexible spending account(s) if I did not utilize my debit card to pay for services. Additionally, I understand that there may be times that I will be required to provide an itemized receipt when my debit card is used.
- My elections (other than the Health Savings Account contributions), including coverage types, cannot be altered without a qualified "Change in Family Status" as defined by the Internal Revenue Code.
- The Southwestern University plan year runs from January 1, 2026 through December 31, 2026. The grace period for incurring Health Care and Dependent Care Flexible Spending Account expenses has been extended to March 15, 2027. The deadline for filing all claims will be April 30, 2027.
- The unused balance of the Flexible Spending Accounts is forfeited if unclaimed by April 30, 2027. I understand that if my employment terminates prior to March 15, 2027, the unused balance of the Flexible Spending Accounts is forfeited if unclaimed within 45 days following my termination date, unless otherwise extended under applicable continuation coverage rules.
- I hereby verify that, if I am married and have elected salary reduction contributions for the Dependent Care benefit in the amounts which will exceed **\$3,750** in one calendar year, I will file a joint income tax return with my spouse.
- By participating and pre-taxing the above premiums, the computing and reporting of my federal income tax will be based on my reduced salary, as will my FICA (social security) contributions.
- If I enroll in the HDHP and elect contributions to the Health Savings Account, I understand that I will be required to submit additional documentation to the custodian of the Health Savings Account in order to open, and have contributions made to, the Account. Further, I understand the applicable eligibility requirements for Health Savings Account contributions and confirm I am eligible to make such contributions and have contributions made on my behalf. I understand that I am solely responsible for any tax consequences related to my participation in the Health Savings Account.

Employee Signature

Date