

Election Change Request for Pre-Tax Benefit Accounts

The Wisconsin Department of Employee Trust Funds (ETF) offers an Open Enrollment period each year for pre-tax benefit accounts. After that time, you may make changes to your elections and enrollment using this form.

For Health Care and Dependent Day Care Flexible Spending Account (FSA) changes, you must have a qualifying life change event, listed below, and your request must be received within 30 days of the qualifying life change event. For Health Savings Account (HSA), Parking Account, and Transit Account changes, you are not required to have a qualifying life event in order to make an election change. The contribution change will be effective the 1st of the month following the application received date.

Instructions:

- Employee: Complete this form and submit it to your Employer Benefits Specialist or Payroll Benefits Staff. Keep a copy for your personal records. NOTE: If changing your election prior to the start of the plan year (January 1), please use the Rescind Request Form at myoptumfinancial.com/etf.
- Employer: Update the employee's record in your HRIS/Payroll System. Retain a copy of the form for your records.

Employer Section

Change Effective Date

First Payroll Affected Date

STEP 1: Personal Information

First Name

Last Name

Employer Name

Employee ID

STEP 2: Election Changes

	Current Annual Election	New Annual Election	2025 IRS Contribution Limit	2024 IRS Contribution Limit
Health Savings Account	\$	\$	\$4,300 individual plan per year \$8,550 family plan per year	\$4,150 individual plan per year \$8,300 family plan per year
Health Care Flexible Spending Account	\$	\$	\$3,200 per year	\$3,050 per year
Limited Purpose Flexible Spending Account	\$	\$	\$3,200 per year	\$3,050 per year
Dependent Day Care Account	\$	\$	\$5,000 per year \$2,500 per year if married filing single	\$5,000 per year \$2,500 per year if married filing single
Transit Account*	\$	\$	\$315 per month	\$300 per month
Parking Account*	\$	\$	\$315 per month	\$300 per month

*UW Hospitals and Clinics employees are not eligible to elect the above Commuter Fringe Benefits.

One-Time HSA Contribution

I would like to make _____ (the number of) contributions to my HSA in the amount of \$_____ starting on/after _____ (specify the date).

STEP 3: Reason for Request – This section is only required for Health Care, Limited Purpose and Dependent Care FSAs	
<p>These changes apply to both Health Care, Limited Purpose and Dependent Day Care FSAs:</p> <ul style="list-style-type: none"> Change in employment status Change in hours worked (now less than 50%) Change in legal marital status Change in number of dependents COBRA Dependent satisfies or ceases to satisfy eligibility requirements Entitlement to Medicare/Medicaid FMLA Judgment, decree or order Other _____ 	<p>These changes only apply to Dependent Day Care FSAs only:</p> <ul style="list-style-type: none"> Addition/elimination of benefit package Change in coverage of spouse/dependent under other employer's plan Change in residence Change in the cost of coverage HIPAA special enrollment rights Loss of group health coverage sponsored by governmental or educational institutions Significant curtailment of coverage Exchange Event: Reduction in hours (fewer than 30) Exchange Event: Exchange enrollment during Exchange open or special enrollment period
STEP 4: Authorization and Certification	
I certify that the information on this form is accurate.	
Account Holder Signature	Date
Employer Signature	Date

Health savings accounts (HSAs) are individual accounts largely held at Optum Bank®, Member FDIC, and administered by Optum Financial, Inc. or ConnectYourCare, LLC, an IRS-Designated Non-Bank Custodian of HSAs, a subsidiary of Optum Financial, Inc. Neither Optum Financial, Inc. nor ConnectYourCare, LLC is a bank or an FDIC insured institution. Flexible spending accounts (FSAs), dependent care assistance programs (DCAPs), health reimbursement arrangements (HRAs), Commuter and Parking Benefits, Tuition Assistance Plans, Adoption Assistance Plans, Surrogacy Assistance Plans, Wellness Benefits, and Lifestyle Accounts (collectively, "Employer-Sponsored Plans") are administered on behalf of your plan sponsor by Optum Financial, Inc. or ConnectYourCare, LLC. Employer-Sponsored Plans are not individually owned and amounts available under the EmployerSponsored Plan are not FDIC insured.