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| **Topic**  | **Checklist**  |
| [ ]  **Spouses and Dependents** | Ensure your dependents are still eligible to participate* Is your dependent reaching the age of 26? You may be required to remove them soon.
* Are they under 26? They are still eligible for benefits.
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| [ ]  **Beneficiary Designations** | Make sure all your beneficiaries are up to date. Check for each of the following: * CalPERS Retirement Plan
* 403(b), 457, 401K
* The Standard (Life and AD&D Insurance Coverage)
* Your last pay warrant
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| [ ]  **Qualifying Events (QE)** | Have you recently experienced any of the following qualifying events?* Marriage or divorce
* Birth or adoption of a child
* Domestic partnership
* Death of a spouse/partner/child
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| [ ]  **Health Care Reimbursement** **Account (HCRA) & Dependent Care Reimbursement Account (DCRA)**  | * HCRA offers tax saving benefits that can be used to pay for out-of-pocket medical expenses not covered by insurance, such as copayments, eyeglasses or dental care.
* DCRA can be used for dependent care and also provide taxable savings.
* Be sure to enroll as this benefit doesn’t roll over.

Keep in mind the following maximum contributions for 2021: 1. HCRA maximum contribution is $2,750 (annually)
2. DCRA maximum contribution is $5,000 (annually)\*

\*If married and file separate tax return the maximum is $2,500. |
| [ ]  **Health, Dental and Vision Care**  **Needs** | * Have the health care (medical, dental and visions) needs of you and/or your family changed over the last year? If yes, it may be time to consider an insurance plan(s) with a different coverage option.
* Be sure your medical doctor is still contracted with your current health plan.
* Visit your campus virtual benefit fair to meet with various vendors.
* Review your benefits to determine the best options available to you and your family.
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| [ ]  **Voluntary Plans** | Check out the voluntary plans for additional coverage/services:* Legal Plan - For your legal needs (open enrollment only)
* Pet Insurance (enroll any time)
* Voluntary life, disability (only certain employee groups are eligible) and AD&D coverage (upon hire or during open enrollment)
* Critical illness coverage (open enrollment only)
* Accident coverage (open enrollment only)
* Home and Auto Insurance (enroll any time)
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| [ ]  **California State University 403(b)****Supplemental Retirement Plan (SRP)** | SRP helps you save money on taxes, invest in your future and supplement your income in retirement. Enrolling today could make a big difference in preparing for your retirement! |