## OPEN ENROLLMENT CHECKLIST

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| ![ ]( ) | Spouse 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. |
| ![ ]( ) | Beneficiary Designations | Make sure all your beneficiaries are up to date. Check for each of the following:  
- CalPERS Retirement Plan  
- 403(b), 457, 401(k)  
- The Standard (life and AD&D insurance coverage)  
- Your last pay warrant |
| ![ ]( ) | 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 |
| ![ ]( ) | 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 provides tax savings.  
Be sure to enroll because this benefit doesn’t roll over.  
Keep in mind the following maximum contributions for 2023:  
- HCRA maximum contribution is $2,850 (annually)  
- DCRA maximum contribution is $5,000 (annually)*  
*The maximum contribution for married couples filing separate tax returns is $2,500. |
| ![ ]( ) | Health Care Needs |  
- Have the health care needs of you and/or your family changed over the last year?  
  If yes, it may be time to consider a health insurance plan with a different coverage option.  
- Be sure your medical doctor is still contracted with your current health plan.  
- Visit your campus benefit fair to meet with various vendors.  
- Review your benefits to determine the best options available to you and your family. |
| ![ ]( ) | Voluntary Plans | Check out the voluntary plans for additional coverage/services:  
- Auto, Home and Renters Insurance  
- Critical Illness and Accident Insurance  
- Legal Plan  
- Pet Insurance  
- Voluntary Life, AD&D and Long-Term Disability Coverage |
| ![ ]( ) | California State University 403(b) Supplemental Retirement Plan (SRP) (Plan Number 50537) | 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!  
You are entitled to complimentary Fidelity financial wellness consultations.  
To schedule your appointment, call (800) 642-7131.  
To enroll, visit [www.netbenefits.com/calstate](http://www.netbenefits.com/calstate) or call Fidelity at (877) 278-3699 or ask your campus benefits office for the enrollment form. |