

Other Eligible Individual Registration Form

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Under the Other Eligible Individual (OEI) program, an MSU employee or retiree who does not have a spouse eligible to enroll for health and/or dental benefits may enroll (1) individual for health and/or dental coverage (“OEI” or “other eligible individual”), but only if ALL of the following eligibility criteria are met:

- The OEI currently resides in the same residence as the employee and has done so for the last 18 continuous months, other than as a tenant;
- The OEI is not a “dependent” of the employee as defined by the IRS; and
- The OEI is not eligible to inherit from the employee under the laws of intestate succession in the State of Michigan (see below).

Children who are qualified and claimed as IRS-defined dependents by an employee’s OEI are also eligible for health and dental benefits if they are members of the employee’s household or a full-time student and they are unmarried and under the age of 19 (up to age 23 if an IRS-defined dependent).

Eligibility to continue coverage for an OEI ceases at the end of the month in which the above criteria are not met. Employees and retirees must immediately notify MSU Human Resources of a change in eligibility status.

The following individuals **do not** fall within the eligibility criteria for this program:

- Spouse
- Children and their descendants (i.e., children, grandchildren)
- Parents
- Parents’ descendants (i.e., siblings, nieces, nephews)
- Grandparents and their descendants (i.e., aunts, uncles, cousins)
- Renters, boarders, tenants, etc.

OTHER IMPORTANT INFORMATION ABOUT THE OTHER ELIGIBLE INDIVIDUAL (OEI) PROGRAM

- There are tax implications to adding an OEI to your benefits. IRS regulations require the University to tax the fair market value of University-provided health and dental benefits for Other Eligible Individuals. The value of the benefits your OEI receives will be counted as taxable income and will result in an increase in the amount of taxes you pay.
- You can only enroll OEIs in your benefits at certain times, including during annual health plan open enrollment periods or within 30 days from your date of hire.
- If you register(ed) your OEI after January 1, 2009 and/or you retired or became eligible to retire after January 1, 2009, your OEI will not be eligible for the University contribution toward health care in retirement. You will still be able to enroll your OEI in benefits, but you will be billed for the full cost of coverage.
- Completing this form does **not** automatically enroll your OEI in benefits. After you complete this form to register your OEI and it has been processed by the Human Resources office, you will need to take additional steps using the EBS Portal to enroll your OEI in benefits in accordance with enrollment deadlines.
- After this form is processed, you will receive a notification email to your MSU NetID email address letting you know your OEI has been registered and, if applicable, giving you instructions for completing the process to enroll your OEI.

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Employee Information

Employee Name (please print neatly): _____

Employee daytime phone number: _____ MSU NetID email: _____

To which of the following groups do you belong?:

Faculty or Staff

Retiree

Graduate Assistant (GA)

OEI Information

Name of the Other Eligible Individual (OEI) you want to register (please print neatly):

OEI Date of Birth: _____ OEI Last 4 Digits SSN: _____

OEI Gender: Male Female

Certifications and Signature

Please initial each of the below statements and sign and date the form below.

_____ *I certify that the OEI named above meets the eligibility criteria as described on page 1 of this form and understand that any information falsified on this document may result in discipline up to and including termination from employment.*

_____ *I understand that OEI benefits are taxable and that I will be responsible for paying the taxes associated with any benefits in which I choose to enroll my OEI. (For further taxation info check out the OEI section of the HR website: www.hr.msu.edu/benefits/other-eligible-individual/index.html)*

_____ *I understand that if I enroll or continue enrollment of my OEI in benefits when I am retired, I will be billed for the full cost of that coverage. (Those who retired or became eligible to retire after January 1, 2009 and/or registered an OEI after January 1, 2009 are not eligible for a continuing university contribution toward OEI health care in retirement.)*

_____ *I understand that I can only enroll my OEI during MSU's annual health plan open enrollment period (unless I am a new hire).*

Employee Signature: _____

Date Submitted: _____

Please return this form to: MSU Human Resources
1407 S. Harrison Road, Suite 110
East Lansing, MI 48823-5287

You may also fax form to 517-432-3862

Questions?

Please contact MSU Human Resources at: 517-353-4434, 1-800-353-4434 or SolutionsCenter@hr.msu.edu