



MSU Human Resources Other Eligible Individual (OEI) Form

Under the Other Eligible Individual (OEI) program, MSU benefits-eligible employees (and retirees*) who do not have a spouse **may enroll one (1) OEI** in health, dental, supplemental life insurance, accidental death & dismemberment (AD&D) coverage, and voluntary benefits (with the exception of Critical Illness Insurance) **if ALL of the following eligibility criteria are met:**

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

Children of an employee’s OEI may be eligible on their health, dental, supplemental life insurance, accidental death & dismemberment (AD&D) coverage, and voluntary benefits (with the exception of Critical Illness). Find additional information on required documentation for OEI children at <https://hr.msu.edu/benefits/documents/EligibleDependents.pdf>.

Eligibility to continue coverage for an OEI and/or OEI children cease 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 and complete an [Affidavit of Termination of Other Eligible Individual Partnership Form](#).

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

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

*Retirees who do not have a spouse may enroll one (1) OEI in health and dental benefit plans only.

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

- There are tax implications, for Active Employees, 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. More information regarding taxation can be found at <https://hr.msu.edu/benefits/other-eligible-individual/index.html>.
- There is a difference between **registering** your OEI to become eligible for benefits and **enrolling** your OEI in benefits. You may register an OEI who meets all the eligibility requirements at any time by completing this form. You can only enroll an OEI in your benefits at certain times, including during annual health plan open enrollment periods, within 30 days from your date of hire or within 30 days of experiencing a work status change that makes you newly eligible for benefits.
- If you registered 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 MSU Human Resources, 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.

Employee/Retiree Information

Employee/Retiree Name (Last, First, Middle Initial)

MSU NetID Email Address

Employee Group (Faculty, Staff, Retiree, Grad Assistant)

Employee/Retiree Daytime Phone Number

OEI Information

OEI Name (Last, First, Middle Initial)

OEI Date of Birth (MM/DD/YYYY)

OEI Social Security Number (SSN)

OEI Gender (Male, Female)

Certifications and Signature

Please initial each of the below statements and sign & 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 for Active Employees and, if applicable, will be responsible for paying the taxes associated with any benefits in which I choose to enroll my OEI and/or OEI child(ren). More information regarding taxation can be found at <https://hr.msu.edu/benefits/other-eligible-individual/index.html>.

I understand that if I enroll or continue enrollment of OEI 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 my MSU annual health plan open enrollment period unless I am a new hire or newly eligible for benefits.

Employee/Retiree Signature

Date

Please return this form to MSU Human Resources by email (SolutionsCenter@hr.msu.edu), fax (517-432-3862) or drop-off in person at 1407 S. Harrison Rd., Suite 110, East Lansing, MI 48823.