**Client Name:**

**Plan(s**)(list all to which these provisions will apply)**:**

**Effective Date:**

**Account Manager:**

**Date submitted:**

**The amendment will be drafted according to the specifications provided on this Checklist.**

**Option A**

***Plan provisions going forward***

1. Choose either a or b below:
   1. **Same rules for all employees**
   2. **Applies only to the categories checked below** (Also complete Option B to specify the provisions for the other categories of employees)

Salaried employees

Hourly employees

All union employees

Union employees in following unions only:

Employees located in the following states:

(no other categories of employees permitted)

1. FT status(choose **one**):
   1. Current hours requirement in plan document
   2. Hours per week (must be 30 or fewer to avoid ACA penalties)
2. Coverage begins for new FT EEs (choose **one**):
   1. Current participation date in plan document
   2. Other – specify:       (e.g., first of month following 30 days of employment, but must not be later than (c))
   3. First of month following 90 days of employment (latest day permitted under ACA)
3. Coverage begins for EEs who change from PT to FT status (choose **one**)
4. Day of status change (Recommended)
5. First of month following status change (risk Part A penalty if EE had 130 hours during month of status change)
6. Other – specify:
7. Coverage ends following change from FT to PT status (choose one):
   1. First of month following status change (Recommended unless coverage extends beyond this date as specified in (c) below)
   2. Day of status change (risk Part A penalty if EE had 130 hours during month of status change)
   3. Other – specify:
8. Break-in-service rule for break of 4 weeks or more (if rehired within less than 4 weeks, always treat as continuously employed)

(choose **one**):

1. Rule of parity (treat as continuously employed if break is less than 13 weeks (26 for EEs of educational organizations) ***and*** break is shorter than the prior period of service; otherwise treat as new EE)
2. 13-week rule (treat as continuously employed if break is less than 13 weeks (26 for employees of educational organizations); otherwise treat as new EE)
3. Current break-in-service rules in plan document (permitted only if more generous than (a) and (b)
4. If continuous EE under (6) above, and eligible for coverage upon return, restore coverage (choose **one**):
   1. Date of rehire (recommended)
   2. First of month following rehire

**Option B – for all categories not checked under Option A**

***Plan provisions going forward***

1. FT status for all categories of employees not checked in Option A above (choose one):
   1. Current hours requirement in plan document
   2. Hours per week (must be 30 or fewer to avoid ACA penalties)
2. Coverage begins for new FT EEs (choose **one**):
   1. Current participation date in plan document
   2. Other – specify:       (e.g., first of month following 30 days of employment, but must not be later than (c))
3. First of month following 90 days of employment (latest day permitted under ACA)Coverage begins for EEs who change from PT to FT status (choose **one**):
4. Day of status change (Recommended)
5. First of month following status change (Risk Part A penalty if EE had 130 hours during month of status change)
6. Other – specify:
7. Coverage ends for EEs who change from FT to PT status (choose **one**):
   1. First of month following status change (Recommended unless coverage extends beyond this date as specified in (c) below)
   2. Day of status change (Risk Part A penalty if EE had 130 hours during month of status change)
   3. Other – specify:
8. Break-in-service rule for break of 4 weeks or more (if rehired within less than 4 weeks, always treat as continuously employed)

(choose **one)**:

1. Rule of parity (treat as continuously employed if break is less than 13 weeks (26 for EEs of educational organizations) ***and*** break is shorter than the prior period of service; otherwise treat as new EE
2. 13-week rule (treat as continuously employed if break is less than 13 weeks (26 for employees of educational organizations); otherwise treat as new EE)
3. Current break-in-service rules in plan document (permitted only if more generous than (a) and (b)
4. If continuous EE under (5) above, and eligible for coverage upon return, restore coverage (choose **one**):
   1. Date of rehire (recommended)
   2. First of month following rehire