

Required enrollment action

Spouse Medical Plan Surcharge Affidavit

If your medical coverage includes your spouse, you must sign a “Spouse Medical Plan Surcharge Affidavit” during annual enrollment confirming their access to employer medical plan coverage through their employer – regardless of whether they enrolled in that coverage. Verify submission requirements and deadlines with your employer. A copy of the form is in your enrollment packet, or visit pebcinfo.com to get a copy of the form.

Medical plan spouse surcharge

If your spouse’s employer offers a medical plan, your spouse did not enroll in that plan and you cover your spouse in your PPO medical plan or HDP, a **\$200 per month spouse surcharge** will apply to your retiree premium, unless your spouse is enrolled in their employer medical plan and you turned in the Affidavit on time.

The surcharge will also apply if you fail to turn in the required Spouse Medical Plan Surcharge Affidavit or if you were late turning it in.

The medical plan spouse surcharge will not apply if:

- Your spouse is enrolled in dental and vision coverage.
- Your spouse is enrolled in both their employer medical plan (proof of enrollment required) and your PPO plan or HDP; or
- Your spouse does not work outside the home and has no access to employer coverage; or
- Your spouse’s employer does not offer medical coverage, or your spouse is not eligible for that coverage; or
- Your spouse’s other coverage is Medicare, Medicaid, TRICARE® or care received at a Department of Veteran Affairs (VA) facility; and
- You turned in the required Spouse Medical Plan Surcharge Affidavit on time.

PLEASE NOTE: The surcharge will apply for each month the Spouse Medical Plan Surcharge Affidavit was not submitted by your employer's deadline (even if the surcharge does not apply or if it was submitted late) or if you fail to notify your employer of a change, which would have triggered or stopped the surcharge.

