

What changes in an employee's status need to be reported to CSI?

- a. **New hire**
 1. Determine [eligibility](#). (Refer to page 4, a-e.)
 2. If eligible, new participants must complete an [Employee Application Form](#). The employer must complete the box on the back side of the form including the salary to be paid and the participation date.

- b. **Change in salary**

Salary changes for the next Plan Year are reported on the enrollment form sent to schools in the spring. (Refer to page 6, j.) After the Plan Year begins, changes in salary can be reported on the [CSI Employee Benefits Billing Change Form](#). Mid-year salary changes may also be reported on the year-end Salary Verification Form.

- c. **Change in legal marital status**
 1. Marriage: submit a [Change of Beneficiary Form](#) to CSI.
 2. Death of Spouse: if beneficiary dies, participant will need to designate a new beneficiary.
 3. Divorce: submit a Change of Beneficiary Form to CSI and either a copy of the divorce decree or a [Declaration of Marital Status Form](#).

- d. **Change in number of dependents**

A change in the number of dependents does not need to be reported.

- e. **Termination of employment or death of employee**

Individuals have the option to leave money in the Plan or receive a cash refund. Report the date of termination or death and final salary paid during the Plan Year. In the case of death, a copy of the death certificate and a contact person will be required.

- f. **Leave of absence**

Participant will be given an inactive status. No contributions can be made.

- g. **Retirement**

If vested, inactive, and 55 or older, an individual may begin drawing a retirement benefit. He or she should call CSI for a retirement projection and an application. An [Application for Retirement Benefits](#) and a [Declaration of Marital Status Form](#) should be submitted to the pension office at least 30 days and not more than 90 days prior to the retirement date.

h. Residence change

All changes of address should be reported by the employee or the school.

i. Disability

1. All active participants are entitled to receive temporary disability benefits if they are unable to work due to a disability. The disability benefit pays 75% of the monthly salary being paid at the time the participant became disabled. Payment begins after a 28 day (four week) waiting period. The school must report when the disabled person returns to work.
2. An [Application For Temporary Disability Benefits](#) form and a [Certification of Disability](#) form must be completed. It is important that the physician is thorough in completing the Certification of Disability Form. Disability payments may be held up if the doctor does not provide complete information.
3. If the employee desires to have income tax withheld from the disability payment, an [IRS W4-S](#) form must be completed.
4. The Plan makes contributions for those disabled during the period of disability.
5. You, as the employer, are required to remit your share of the FICA payroll tax to the IRS as if the payments were made out of your own payroll. Also, you are responsible for providing a written statement to your employee(s) at year-end as well as other reporting requirements with respect to receipt of these sick pay benefits.

j. Annual enrollment

Each spring, enrollment materials are sent to each participating school for the next Plan Year. Included is a School Plan Selection Form a computer listing of current employees, and a supply of Employee Application Forms.

k. Change of beneficiary

Refer to 5, c., change in legal marital status.

up/reporting of status changes