

Flexible spending account Enrollment/change form

Attention: ASO Flex MS 2260

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HealthEquity



I am completing this form for (check all that apply):

- ☐ FSA enrollment ☐ Limited FSA enrollment ☐ Dependent care enrollment ☐ Name/address change ☐ FSA election change
(for use with an HSA health plan)

Section 1 – Employee information

Complete each item in this section.

Employee last name	First name	Middle	Social Security number <i>*required for FSA enrollment</i>	
Street address	City	State	Zip code	Phone
Employer name	Group number	Gender <input type="checkbox"/> Male <input type="checkbox"/> Female	Birth date: / /	
Date of hire: / /	Email address			

Section 2 – Dependent information (required for all dependents eligible for FSA reimbursements)

Complete each item with your spouse and dependent(s) information.

	Social Security number	Last name	First name	M.I.	Gender	Birth date	Relationship to employee
1 – Spouse					<input type="checkbox"/> Male <input type="checkbox"/> Female		
2 – Dependent					<input type="checkbox"/> Male <input type="checkbox"/> Female		
3 – Dependent					<input type="checkbox"/> Male <input type="checkbox"/> Female		
4 – Dependent					<input type="checkbox"/> Male <input type="checkbox"/> Female		

Please attach a separate document listing additional dependents and their information.

Section 3 – Flexible spending arrangement enrollment and pre-tax elections

Check the appropriate box for enrollment or to decline enrollment. Enter your total annual contribution amount in the box marked "Annual election amount." Your annual maximum may not exceed the lesser of your earned income, spouse's earned income or employer's maximum amount.

Health care FSA: See your employer materials for election maximum	Annual election amount
<input type="checkbox"/> Yes – I wish to participate in the health care FSA (please place election to the right)	\$
<input type="checkbox"/> No – I decline to participate in the health care FSA	
Dependent care FSA: Annual maximum up to \$5,000 (however, your elected amount cannot be greater than you or your spouse's earned income OR \$2,500 if you are married but file a separate tax return from your spouse)	Annual election amount
<input type="checkbox"/> Yes – I wish to participate in the dependent care account (please place election to the right)	\$
<input type="checkbox"/> No – I decline to participate in the dependent care account	

Section 4 – Pre-tax premium elections

On a separate enrollment form, I have enrolled in one or more health care coverages (medical, dental, vision) and I have received materials showing my share of the contributions for such coverage. I understand that an amount equal to such contributions will be deducted on a pre-tax basis from my paychecks to pay for the coverages that I elected. I understand that my contributions to premium may be automatically increased or decreased to coincide with changes made to my coverage premium(s).

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Section 5 – Employee certification

Read this section carefully then sign and date the form. Make or keep a copy for your records and submit the completed form to your payroll, personnel or benefits office.

As evidenced by the signature below:

- I certify that I will not seek reimbursement elsewhere for expenses that the health care FSA reimburses. Or, if I have been reimbursed for any amount that has also been paid or reimbursed by another health plan, I will arrange to repay that amount to my health care FSA.
- I understand any amounts remaining in my account(s) not used for eligible expenses incurred during the plan year will be forfeited in accordance with current plan provisions and tax laws.
- I understand that the deduction(s) listed above will be in effect for the plan year and cannot be revoked or changed unless I experience a change in my family status or termination of my spouse's employment, consistent with federal regulations.

Employee signature

Date

Section 6 – Employer information

Indicate any changes in family status such as marriage, birth or adoption or divorce.

Employer health care arrangement contribution (if applicable):

Change in status	Reasons for additions or changes <input type="checkbox"/> Marriage <input type="checkbox"/> Birth <input type="checkbox"/> Child by legal adoption/guardianship (attach copy of court form) <input type="checkbox"/> Other _____		Effective date of change / /
	Reason for deletions or changes <input type="checkbox"/> Marriage of dependent <input type="checkbox"/> Divorce <input type="checkbox"/> Death <input type="checkbox"/> Lost eligibility <input type="checkbox"/> Other _____		Effective date of change / /
Employee election change	Health care FSA	Old annual election amount \$	New annual election amount \$
	Dependent care account	Old annual election amount \$	New annual election amount \$
Employer signature			Date