



Business Services

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Flexible Spending Account (FSA) Data Collection Worksheet

Please complete and submit this worksheet to your employer. This is an internal document used by your employer for data collection purposes.

* = Required Fields

Step 1: Participant Information

*Employer Name (Do not abbreviate)		*Employee Identifier Number	
*Participant Name (First, MI, Last)		*Social Security Number	
*Participant Mailing Address		Email Address (If provided, all notifications will be sent via email)	
*City	*State	*Zip	
Day Telephone	*Birth Date (mm/dd/yyyy)	*Hire Date (mm/dd/yyyy)	
*Gender (Please circle one): Male / Female		*Marital Status (Please circle one): Married / Single	

Step 2: Employee Premiums

If you have a payroll deduction for insurance premiums, eligible premiums will be deducted before taxes are calculated. You will automatically be enrolled in this portion of your Section 125 Plan. However, if you wish, you may opt out of the Employee Premium Conversion part of the Plan by contacting your HR Department and filling out the waiver form. *Please Note: Insurance premiums are not eligible for reimbursement with your Medical Spending Account.

Step 3: Enrollment and Election Information

*Plan Type (if enrolled in an HSA, you are not eligible to enroll in the Medical FSA. However, you are eligible for Dependent Care FSA.)

- *Annual Election (if employer funded, note 'ER' next to amount)
- *Number of Pay Periods (if enrolling mid-year, please enter the number of remaining pay periods within the plan year)
- *Per Pay Period Amount (to be deducted each pay period)
- *Date of First Payroll (mm/dd/yyyy)
- *Participant Effective Date (mm/dd/yyyy)
- *Pay Frequency (please circle one)

Medical FSA Limit set by employer	Dependent Care Account Limit set by employer up to IRS maximum
\$	\$
÷	÷
=	=
Monthly / Semi-Monthly / Bi-Weekly 24 / Bi-Weekly 26 / Weekly / Other	

Step 4: Authorization

I authorize my employer to reduce my pay on a per pay period basis as indicated above. I understand my reduction is for one flex plan year and that I cannot change or revoke my election unless I experience a qualifying event in accordance with Internal Revenue Code Section 125 and submit my request within a reasonable amount of time as deemed by the IRS and my employer. I am aware of the plan's forfeiture provision and that my Social Security and federal unemployment benefits may be reduced because of my reduced salary for tax purposes. Further, I authorize the release of any information necessary to substantiate claims submitted against my Flexible Spending Account.

*Participant Signature	*Date
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Step 5: Refusal (**NOTE: only complete this step if you are NOT electing to enroll in a Flexible Spending Account)

I understand that if I choose not to participate in a Flexible Spending Account (FSA), I cannot enter the program until the next plan year unless I experience a status change in accordance with Internal Revenue Code Section 125 and submit the change within 30 days of the status change.

*Participant Signature	*Date
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