



# FSA ENROLLMENT FORM AND SALARY REDIRECTION AGREEMENT

If you would like to enroll in the flexible spending account (FSA) plan, please complete the following form and return it to a Human Resources contact in your organization.

- Annual Open Enrollment**     **Mid-Year Enrollment-New Hire**     **Change of Status** (choose reason below)
- Birth/Adoption     Marriage     Divorce     Leave of Absence     Death of Participant     Other
- Death of Spouse/Dependent     Job Change     Spouse Job Change     Return from Leave of Absence

Employer Name: Independent School District 15    Employee Name: \_\_\_\_\_

Social Security Number: \_\_\_\_\_    Email Address: \_\_\_\_\_

Address: \_\_\_\_\_    City: \_\_\_\_\_    State: \_\_\_\_\_    Zip Code: \_\_\_\_\_

Phone #: \_\_\_\_\_     W  H    Date of Birth: \_\_\_\_\_    Gender: \_\_\_\_\_    Date of Hire: \_\_\_\_\_

Employee ID: \_\_\_\_\_    Division: \_\_\_\_\_    Work Location: \_\_\_\_\_

**List tax dependents eligible for benefits:**

Name (First, Last)	Full Time Student?	Gender	Date of Birth	Relationship
Spouse				
Dependent				
Dependent				
Dependent				

**Choose your Election Amount:**

Please withhold the annual election amount below as pre-tax deductions from my paycheck during the designated plan year for deposit to the designated flexible spending account.

Plan Year: 2020-2021    Effective Date on Plan: 7/1/2020

Initials	Benefit	Total Annual Election
_____	Medical Flexible Spending Account	\$ _____ /annually (\$2,650 max)
_____	Dependent Care Flexible Spending Account	\$ _____ /annually (\$5,000 max)

This Agreement intends to conform with Sec(s). 79, 105, 106, 125, 129 of the I.R.S. Code providing employee benefits. As provided for in said Sections, Employer has created a Cafeteria Plan to provide Employee with benefits. Employer and Employee mutually agree as follows:

- I. Employee's per pay cash compensation shall be redirected by the amounts listed below effective the first pay period beginning on or after Employee becomes eligible for benefits and shall continue until this Agreement is amended or canceled. Employee's elections and participation shall be governed by the terms of the Dependent Care Reimbursement and Health Care Reimbursement Plans as amended from time to time.
- II. Redirected salary must reimburse expenses incurred during Plan Year and may not be carried into future years. Any amount not reimbursed for the current Plan Year will be returned to the Employer's general fund. If employment is terminated, this Agreement terminates; however, Employee retains the right to benefits in accordance with the Plan Document.
- III. By offering this Plan, the Employer has provided no tax advice regarding participation in this Plan, therefore, the Employee waives any claims against the Employer and holds the Employer harmless for any taxes or assessments that may be imposed by the Internal Revenue due to future interpretations or changes in the laws governing these Plans.

**Accepted by Employee**

Signature: \_\_\_\_\_    Date: \_\_\_\_\_

Claims: [claims@tasconline.com](mailto:claims@tasconline.com) | Toll-Free Fax 866-450-1480 | TASC | P.O. Box 7213 | Madison, WI 53707-7213

Service: [svchelp@tasconline.com](mailto:svchelp@tasconline.com) | Toll-Free 866-678-8322



## DIRECT DEPOSIT AUTHORIZATION

I hereby authorize TASC to initiate deposit of my medical and/or dependent care expense reimbursements to the bank account indicated below and, if necessary, debit entries and adjustments for any credit entries made in error to my account.

**Please attach a copy of a voided check if you are electing to have reimbursement sent to a checking account.**

**\*If you are electing to use your savings account please contact your bank for the Transit ABA Routing Number.**

If you are re-enrolling during Open Enrollment and are already signed up for direct deposit, you do not have to complete this form. We will continue to deposit reimbursements to the bank account on record.

This account is (Please check one of the following options)

New       Change       Cancel      Name of Bank: \_\_\_\_\_

\_\_\_\_\_  
Transit ABA Routing Number      Account Number      Account Type  
(Checking or Savings\*)

**Attach  
Voided Check  
OR  
Savings Deposit Slip  
HERE**

Bobby Brady 123 Main Street Anywhere, USA 55439	<b>3448</b>
Date _____	
Pay to the Order of _____	
_____ Dollars	
For _____	
:091000019 : 3564895891" 3448	

(Routing Number) (Account Number)

Employer Name: Independent School District 15       Address Change

Employee Name: \_\_\_\_\_      Last 4 of SSN: \_\_\_\_\_

Home Address: \_\_\_\_\_

Email Address: \_\_\_\_\_      Telephone: \_\_\_\_\_

\_\_\_\_\_  
Signature      Date