

# FLEXIBLE SPENDING HEALTHCARE & DEPENDENT CARE ENROLLMENT

## Instructions

1. Complete this form in order to open a Flexible Spending Account. \* Required Field
2. Forward the completed form to your Human Resource Department.
3. If you have any questions regarding this form, please contact your Human Resource Department.

Group Name\*: 27J Schools

Group #: SCH304

Plan Year: 7/1/2024 - 6/30/2025

Employee Name\*: \_\_\_\_\_ Social Security Number\*: \_\_\_\_\_

Employee ID Number: \_\_\_\_\_ Email Address \*: \_\_\_\_\_

Address\*: \_\_\_\_\_ Gender:  Female  Male

City\*: \_\_\_\_\_ State\*: \_\_\_\_\_ Zip\*: \_\_\_\_\_ Date of Birth\*: \_\_\_\_\_

Home Phone\*: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Yes  I am enrolling in the Flexible Spending Account No  I am NOT enrolling in the Flexible Spending Account

### Healthcare Reimbursement Enrollment:

(Notes: Do not include premium contributions in this amount.  
See your employer for minimum and maximum amounts allowed.)

Per Pay Period Election:

Annual Election:

Total Amount Desired to Fund Healthcare Flexible

\$ \_\_\_\_\_

\$ \_\_\_\_\_

Spending Account (min. annual election) \$ 30/pay

Spending Account (max. annual election) \$ 2,400

### Dependent Care Reimbursement Enrollment:

(i.e., preschool, after school childcare, dependent daycare, etc.)

Total Amount Desired to Fund Dependent Care Flexible

Spending Account (max. annual election \$5,000)

\$ \_\_\_\_\_

\$ \_\_\_\_\_

**Flexible Spending Account Authorization Agreement:** The Plan requires a certification upon enrollment and each plan year thereafter that the flexible spending account will only be used for eligible expenses of the employee and the employee's spouse and dependents. As the Plan participant, I certify that any expense paid with the flexible spending account has not been reimbursed and that as the participant I will not seek reimbursement under any other plan covering these benefits. As the Plan participant, I also agree to acquire and retain sufficient documentation for any expense paid with the flexible spending account, including invoices and receipts and will submit them to H S A Bank as required per the IRS' documentation standards to validate my purchase. I further certify that if I should purchase items using my flexible spending account that are not deemed to be eligible expenses, I authorize my employer, or H S A Bank on my employer's behalf, to collect the improper payment from me. If this option is unsuccessful, I understand that I will be denied access to the flexible spending account until the debt is repaid by me.

**Enrollment Authorization:** By signing I certify that I understand the benefits available to me as well as the other rights and obligations that I have under the Plan. I understand this agreement revokes any prior election under this plan and that during the plan year this agreement is irrevocable and cannot be changed except under special circumstances as outlined in the Summary Plan Description. I understand that, except for certain family situations as defined by the SPD, my participation in this Plan is for the entire Plan Year. I understand that if my required contributions for the elected benefits are increased or decreased while this agreement remains in effect, my compensation redirection will automatically be adjusted to reflect that increase or decrease. I understand this redirection will reduce my P.E.R.A. Includable Salary used in calculation of my P.E.R.A. Benefits. I understand that amounts redirected into this account may not be used in any other benefit plan, refunded or carried over to the following year. Reimbursement will be available only for qualified health care expenses as described in the Summary Plan Description. I agree to notify my employer if I have reason to believe that any expense for which I have obtained reimbursement is not a qualifying expense. Prior to the beginning of each Plan Year, I will be given an opportunity to change the amount of my election or revoke my participation. If I do not submit a new election, my coverage will end with plan year of this election. The Plan Administrator may reduce or cancel my compensation redirection or otherwise modify this agreement in the event he believes it advisable in order to satisfy certain provisions of the Internal Revenue Service. This agreement is subject to the terms of the Employer's Flexible Benefit Plan as may be amended from time to time in effect, shall be governed by and construed in accordance with applicable laws, shall take effect as a sealed instrument under the applicable laws, and revokes any prior election and salary reduction agreement (if any) relating to such a plan.

Employee Signature \_\_\_\_\_ Date \_\_\_\_\_