



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. Worksheets returned to WEX Health, Inc. cannot be processed.

*=Required Fields

Step 1: Participant Information

*Employer Name (Do not abbreviate)		Employee ID Number	
*Participant Name (First, MI, Last)		*Social Security Number	
*Participant Mailing Address		*City	*State *Zip
Email Address		Day Telephone	
*Date of Birth (mm/dd/yyyy)	*Hire Date (mm/dd/yyyy)	*Gender (M/F)	*Marital Status (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. **Note:** Insurance premiums are not eligible for reimbursement with your Medical or Limited 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 both the Limited Medical FSA and Dependent Care FSA if offered through your employer.)

*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 check one):

☐	☐	☐	☐	☐	☐
Monthly	Semi-Monthly	Bi-Weekly 24	Bi-Weekly 26	Weekly	Other

Medical FSA
Limit set by
employer

Dependent Care Account
Limit set by employer
up to IRS maximum

Limited FSA
Limit set by employer if
this plan type is offered

\$	\$	\$
÷	÷	÷
=	=	=

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

Step 5: Refusal (Note: Only complete this step if you are NOT electing to enroll in a Flexible Spending Account)

Participant Signature	Date



IRS releases 2026 limits

The IRS released 2026 limits for FSAs, commuter benefits, adoption assistance, QSEHRAs, and more.

The new 2026 limits are:

FSA (medical, limited, combination, and post-deductible FSAs)	\$3,400 per year
Medical FSA carryover	\$680 per year
Commuter benefits (mass transit and parking)	\$340 per month
Adoption assistance	\$17,670 per year
QSEHRA	Single \$6,450 / Family \$13,100 per year

Previously announced 2026 limits:

HSA	Single \$4,400 / Family \$8,750 per year
Minimum deductible for qualifying HDHP	Single \$1,700 minimum deductible / Family \$3,400 minimum deductible
Maximum out-of-pocket expenses for HDHP	Single \$8,500 max out-of-pocket / Family \$17,000 max out-of-pocket
Dependent care FSA	\$7,500 per year

[Check out our blog](#) for a side-by-side comparison of the limits for 2025 and 2026.