



# FSA Enrollment Form

For more information, please visit our website or contact Customer Service.  
www.benefitsworkshop.com/oaklandpark • (888) 537-3539 • info@benefitsworkshop.com



Name \_\_\_\_\_

Social Security Number \_\_\_\_\_ Is this a new address?  YES  NO

Address \_\_\_\_\_

City, State, ZIP \_\_\_\_\_

Phone \_\_\_\_\_  cell  home  work Email \_\_\_\_\_

**Please choose one.**

<input type="checkbox"/> <b>Election during Open Enrollment</b>  Effective Date <u>1/1/2021</u>	<input type="checkbox"/> <b>Election during a Plan Year</b>  Effective Date _____	<input type="checkbox"/> <b>Amendment to an existing election</b>  Effective Date _____
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**Please indicate your selection(s) below.**

<b>Health Care FSA</b>  Annual Amount        \$ _____ Number of Paydays    _____ Contribution each Payday    \$ _____  The maximum annual amount is \$2,750 per plan year.	<b>Dependent Care FSA</b>  Annual Amount        \$ _____ Number of Paydays    _____ Contribution each Payday    \$ _____  The maximum annual amount is \$5,000 per plan year, or \$2,500 if married & filing separately.
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**Order additional cards (optional).**

A BenefitsWorkshop Debit Card will be ordered in the employee's name only. A card can be ordered for your spouse or dependents for a \$5.00 handling fee, which will be deducted from your account balance. By providing the requested information, you are authorizing BenefitsWorkshop to deduct this fee from your account. Individual cards are not required to access the account.

Name \_\_\_\_\_ SS# \_\_\_\_\_  spouse  child

Name \_\_\_\_\_ SS# \_\_\_\_\_  spouse  child

By signing this form, I authorize my employer to redirect (reduce) my taxable pay by the indicated amounts. I understand and agree that: (1) I have read the plan materials available to me and I understand the operation and rules of the plan. (2) I cannot change or cancel my election for the remainder of the plan year unless I have a qualifying event. (3) I cannot transfer money between the reimbursement accounts. (4) Unspent funds will be forfeited after the grace period ends. (5) The elections I have made are in accordance with the plan documents and the provisions of Internal Revenue Service Code Section 125, and will be taken out in equal installments throughout the year. (6) I will only use the Debit Card to pay for eligible medical expenses for myself or my covered dependents. (7) I will not use the debit card for any medical expense that has already been reimbursed, and I will not seek reimbursement under any other health plan for expenses paid for with the debit card. (8) I will acquire and retain sufficient documentation for any expense paid with the debit card. (9) I understand that failure to submit documentation for debit card transactions (when required) in a timely manner may result in my debit card being block until the requested documentation is submitted. I also understand that repayment of ineligible or undocumented transactions may be required.

Participant Signature \_\_\_\_\_

Date \_\_\_\_\_