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Flexible Spending Account Worksheet

When determining how much you would like to contribute to your Flexible Spending Account, you should keep in mind the following:

- In most cases, an employee may not make a mid-year change in the amount he or she has elected to contribute to a Flexible Spending Account.
- Money remaining in a Flexible Spending Account at the end of the plan year must be forfeited. However, up to $680 of unused funds may be carried over from one year to the next. In addition, any amount that is carried over does not count toward the maximum contribution limit.
- Over-the-counter medicines and drugs (other than insulin) are only reimbursable if accompanied by a prescription.

This worksheet can be used to estimate how much you should elect to contribute to your Flexible Spending Accounts.

Health Flexible Spending Account Expenses not covered by insurance may include:	
Deductibles, coinsurance or copayments	$
Dental care (exams, fillings, crowns, orthodontia, dentures, bridgework, partials)	$
Hearing care (exams, hearing aids, batteries)	$
Infertility treatment	$
Insulin and diabetic supplies	$
Prescription drugs (e.g., cholesterol medications)	$
Transportation expenses (to receive medical care)	$
Vision care (exams, contacts & supplies, eyeglasses, laser surgery)	$
Weight loss program (done at doctor's direction to treat an existing disease)	$
Wheelchairs and other special equipment	$
Other	$
Annual Health Flexible Spending Account Election	$

Dependent Care Flexible Spending Account Annual maximum allowable expense of $7,500.	
Day babysitters/Day care centers (day care expenses for dependents up to age 13)	$
Elder care	$
Day camp	$
After-school programs	$
Nursery school	$

Total pretax contributions to Flexible Spending Accounts:	$

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