

ARE YOU OR A SPOUSE ENROLLED IN AN HSA? IF YES, STOP AND SPEAK WITH YOUR HUMAN RESOURCES DEPARTMENT BEFORE ENROLLING IN THIS PLAN



This is a two page form. Be sure it has a back side.

<b>Vestal Central School District</b>			<b>PLAN YEAR</b> Oct '21 Sept '22	ALL INFORMATION MUST BE PROVIDED. PLEASE PRINT IN INK.			
LAST NAME		FIRST	INITIAL	SOCIAL SECURITY NUMBER			
STREET ADDRESS (Please add any PO BOX#, Apt #, etc.)							
CITY			STATE	ZIP CODE			
SEX <input type="checkbox"/> MALE <input type="checkbox"/> FEMALE	DATE OF BIRTH		HIRE DATE	CURRENT MARITAL STATUS <input type="checkbox"/> MARRIED <input type="checkbox"/> SINGLE	<input type="checkbox"/> DIVORCED <input type="checkbox"/> SEPARATED	<input type="checkbox"/> WIDOWED	
WORK PHONE ( ) -		HOME PHONE ( ) -		JOB TITLE		LOCATION	

LIST BELOW DEPENDENTS THAT ARE DEFINED BY IRC SECTION 105(B) AS ELIGIBLE FOR TAX FREE HEALTH BENEFITS AND YOUR SPOUSE (According to Federal Law) OR DOMESTIC PARTNER WHO ARE DEPENDENTS FOR INCOME TAX RETURN PURPOSES

LAST NAME (IF DIFFERENT)	FIRST NAME	DATE OF BIRTH			RELATIONSHIP				Please indicate if any person is NOT covered by a group health plan.
		MO	DAY	YR	HUS	WIF	SON	DAU	

**Spousal Information**

If you or any of your dependents are covered under a health benefit plan not listed below, such as for children of divorced or separated parents, or children covered under NYS Child Health Plus, or yourself covered under a previous employer plan, please supply that information and attach to this form.

IS YOUR **SPOUSE** EMPLOYED?  YES  NO IF YES, NAME OF EMPLOYER : \_\_\_\_\_

IS YOUR **SPOUSE** COVERED UNDER **HIS/HER** EMPLOYER'S HEALTH PLAN?  YES  NO

NAME OF CARRIER: \_\_\_\_\_

MEDICAL COVERAGE  DENTAL COVERAGE  VISION COVERAGE

DOES THIS INSURANCE COVER :  SPOUSE ONLY  SPOUSE AND FAMILY

**ARE YOU** COVERED UNDER **YOUR** EMPLOYERS MEDICAL PLAN?  YES  NO  SINGLE  FAMILY

**ARE YOU** COVERED UNDER **YOUR** EMPLOYERS DENTAL PLAN?  YES  NO  SINGLE  FAMILY

I ELECT to enroll in the Flexible Benefits Program and hereby authorize the following salary redirection. I understand that:

- 1) I may not change my election during the year except for a change of status..
- 2) I will forfeit any balance remaining 90 days after the Plan Year.
- 3) If I terminate from this Plan, I have 90 days to submit claims incurred prior to my termination date for my Medical Flexible Spending Account and/or dependent care account. Inquire if you are eligible to elect COBRA for your Medical FSA.
- 4) I understand that this reduction of my cash compensation could affect my Social Security Benefits.
- 5) I understand I am responsible for keeping all my receipts/itemized bill/EOB's etc. for claim substantiation and potential tax purposes. My card could be suspended if I do not comply with substantiation requirements.
- 6) I am responsible for the cost of reissuing or replacing my debit card.
- 7) VAA-CAB \$2500, VEA \$2000  
ASA \$2700, AVSP \$1000, SOS \$2700

PLEASE READ THE REVERSE SIDE BEFORE SIGNING THIS FORM.

	Plan Year MAXIMUM	Employee Plan Year Election	Per Pay Period
UNREIMBURSED MEDICAL	REFER o #7 ABOVE	\$	\$
DEPENDENT CARE EXPENSES - (Daycare)	\$5000	\$	\$
<b>TOTAL</b>		\$	\$

By providing my email address below, I authorize SIEBA, LTD to contact me regarding claim questions and other information related to my flex plan. This email address will not be used for any other purpose.

email address \_\_\_\_\_

X \_\_\_\_\_ DATE \_\_\_\_\_

SIGNATURE

FOR OFFICE	EFFECTIVE DATE	EMPLOYEE'S PAY PERIOD FORMAT
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# QUALIFYING UNREIMBURSED MEDICAL EXPENSES

(only eligible expenses NOT reimbursed by other benefit source can be claimed)

Expenses are eligible in accordance with Section 213, Section 105(b) and Section 125 of the IRC. Refer to IRS publication 502 for guidance, as all eligible expenses that are deductible on your income taxes are NOT always reimbursable through a Flexible Benefit Program. Publication 502 can be found at [www.sieba.com](http://www.sieba.com).

Abortion (legal)	Fees cont:	Guide dog or other animal
Alcoholism & drug abuse center	Gynecologist	Hearing devices
Ambulance hire	Hospital	***Hospital bills
Artificial limbs & teeth	Laboratory	Iron lung, operating cost
Automobile modifications (hand controls, special equipment, mechanical lifts)	Lip reading lessons for the deaf	**Medicine including insulin
Birth control pills	Medical information plan	Menstrual Care Products
Braille books & magazines	Midwife	Nursing care
Childbirth classes - mother only	Nurse	Obstetrical expense
****Co-insurance amounts, co-pay amounts	Obstetrician	Operations & related treatments
Crutches	Ophthalmologist	Oxygen equipment
Deductibles	Optician	PPE-face masks, hand sanitizer
Elastic hose, medically prescribed	Optometrist	Refractive eye surgery
<b>*RX Eye glasses/contact lenses &amp; solutions</b>	Oral surgery	Rental of healing or medical equipment
Fees:	****Orthodontist	Seeing-eye dog
Acupuncture	Osteopath	Special education
Anesthetist	Pediatrician	Television set modifications to receive closed captions
Chiropractor	Physician	Support or corrective devices
Clinic	Physiotherapist	Telephone for deaf
Dentist	Podiatrist	Therapy treatments
Diagnosis	Practical nurse	Transportation expense
Examination, physical	Psychiatrist	Relative to illness
Eye examination	Psychologist	\$.17 for 2020
	Specialist	\$.16 for 2021
	Surgeon	X-rays
	Therapy as a medical treatment	Wheelchair

- \* **Contact lens or eye glass insurance or service agreements are NOT reimbursable through an unreimbursed medical account.**
- \*\* **Medicine/drug as excludable from gross income as allowed by §105(b). Illegally imported drugs are not reimbursable. Refer to “Things to Know” flyer for important changes regarding OTC products effective 1/1/20 as a result of the CARES Act.**
- \*\*\* **TV & Telephone charges from a hospital stay are not eligible for reimbursement through an unreimbursed medical account.**
- \*\*\*\* **Please contact SIEBA if you are using your account for Orthodontic services for a detailed explanation of eligible expenses.**
- \*\*\*\*\* **Medicare and other Insurance Premiums are NOT reimbursable through an un-reimbursed medical account.**

You cannot include in medical expense an item ordinarily used for personal, living, or family purposes unless it is used primarily to cure or alleviate a physical or mental defect or illness. Where an item purchased in a special form primarily to alleviate a physical defect is one that in normal form is ordinarily used for personal, living, or family purposes, the excess of the cost of the special form over the cost of the normal form is a medical expense.

Some of the above expenses may require additional documentation from your physician such as letters of medical necessity. If in doubt, please feel free to contact SIEBA, LTD.

Expenses categorized as **COSMETIC PROCEDURES** are **NOT** reimbursable. For example; The use of **RETIN A** for wrinkles, teeth whitening and bleaching, orthodontia for solely cosmetic purposes are **NOT** reimbursable. Spider Vein and Varicose Vein Treatment **COULD** also be considered Cosmetic in nature. Check with your health benefit carrier prior to making your election. If your health carrier considers the procedure as cosmetic in nature, your flex plan would as well.

## QUALIFYING DEPENDENT CARE EXPENSES

In brief, expenses must be paid to a dependent care center or care provider. (Overnight camp is ineligible) The provider must declare their income and provide the participant with a tax identification number or social security number (W-10). Form 2441 or Schedule 2 must be completed with your income tax return. Eligible expenses are those expenses paid for the care of a dependent under age 13 or expenses paid for care of other dependents who are physically or mentally incapable of caring for themselves. Expenses must be incurred to enable the employee and if married, his/her spouse, to be gainfully employed. The maximum amount allowable under IRS Guidelines to set aside on a pre-tax basis for eligible dependent care expenses is \$5000 if you are married, filing a joint tax return, or a single head of household, or \$2500 if you are married filing separate tax returns. **If your spouse is also eligible to participate in a dependent care account, the maximum amount allowable to set aside per household is \$5000.** Daycare expenses incurred while a parent is out on medical leave such as maternity leave or other leave of absence (paid or unpaid) are not eligible for reimbursement.

Please refer to IRS Publication 503 for specifics relating to eligible dependent care expenses which can be found at [www.sieba.com](http://www.sieba.com).

**Once an election has been made, it CANNOT be changed. We strongly recommend that if you have any questions regarding the eligibility of an expense, you contact the claim administrator, SIEBA, LTD. at (607) 786-3003 or (800) 252-4624 BEFORE making any election.**

Eligibility of expenses is subject to change based on current tax laws.

March 31, 2021

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