

Healthcare Spending Account Enrollment Form

Employer Name:

 enrollments@benstrat.com



603-647-4668 (15 page max)

Employee Information:

Name:

First/Last

Social Security Number:

Address:

City:

State:

Zip Code:

Date of Birth:

MM/DD/YYYY

Primary Phone:

Email Address:

Email is required to receive important account notifications such as claim confirmations, payment notifications and denial letters.

Flexible Benefit Plan Pre-Tax Elections:

Health Care Reimbursement Account: Eligible health expenses include professional medical expenses incurred by my dependents or myself during the Plan Year for the diagnosis, cure mitigation, treatment or prevention of disease, or for the purpose of affecting any structure or function of the body.

Per Pay Period Contribution

Number of Pay Periods x

Total Election = \$

Maximum Election Allowed:

Minimum Election Allowed:

Debit Card:

If you are a new enrollee a set of 2 debit cards will be mailed out to you automatically. If you and/or your dependents already have debit cards, they will automatically be reactivated.

Direct Deposit:

For faster reimbursement, sign up for direct deposit through our [online portal](#) or [direct deposit form](#).

Signature:

By signing below, I agree to the following terms and conditions. I cannot change this election during the Plan Year unless I have a qualifying change in family status. I must make all of my elections carefully and conservatively. Expenses from Reimbursement Accounts cannot be reimbursed from any other source and must be incurred during the Plan Year. Any money unclaimed from my reimbursement account(s) at the end of the Plan Year will be forfeited to my employer after a run-out period. I will not receive it back. For expenses reimbursed through this account I certify I have not been reimbursed and will not seek reimbursement under any other plan covering health benefits. The IRS requires me to keep documentation of all my expenses claimed and supply them to Benefit Strategies if requested. I have read and understood all of the plan details outlined in my Summary Plan Description.

Employee Signature:

First/Last

Date:

MM/DD/YYYY

Employer Acceptance:

First/Last

Benefit Effective Date:

MM/DD/YYYY

If this is a mid-year enrollment, please list the first payroll date for deductions.

First Payroll Date:

MM/DD/YYYY

