Understanding Your Flexible Spending Account Allocation

The Spending Account (SA) offers two account streams, a non-taxable Health Spending Account (HSA) and a taxable Wellness Spending Account (WSA). Eligible staff members will receive an annual allocation for their use within the program guidelines. For a term appointment of less than a full year, these amounts will be prorated. Every year in December you will be required to allocate your next year's Spending Account into one or both of the account streams.

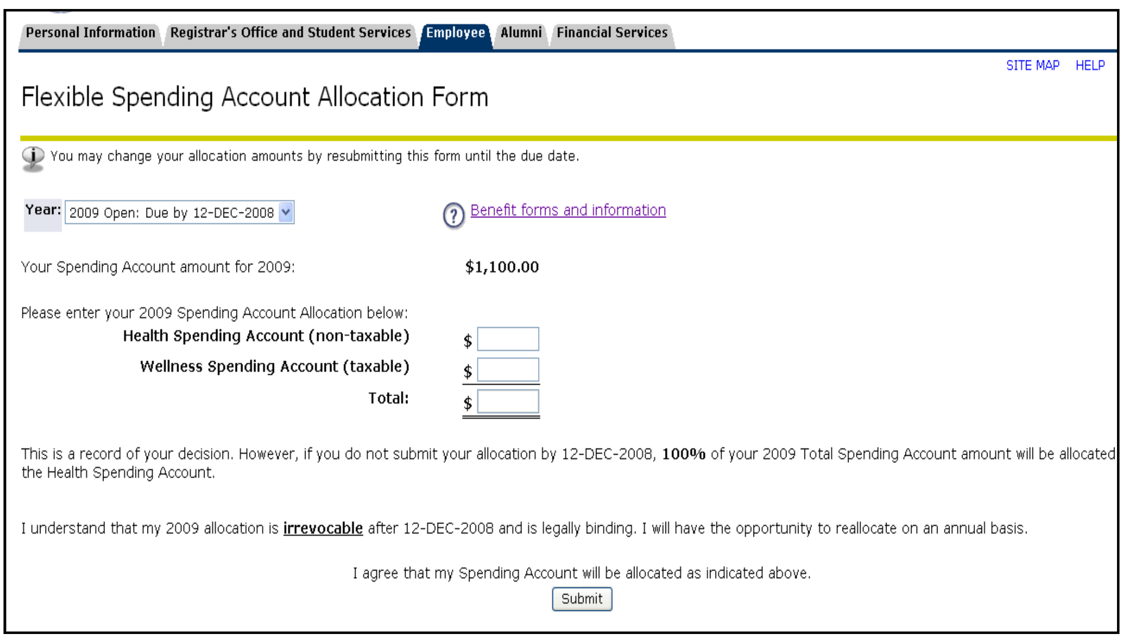
Accessing Your Flexible Spending Account Allocation Form

Before you can update your Flexible Spending Account allocation, you will need to navigate through The Bridge by clicking on the Employee tab, click on the Benefits and Deductions, and click on the Flexible Spending Account Allocation Form.

Submitting your Flexible Spending Account Allocation Form

1) Please make sure you are in the right year and it is open for entering.

2) Your screen will look similar to the below **EXAMPLE:**



3) You will be able to see your total Spending Account amount. (If you are eligible for a surplus, it will show on your form.) In this form, you can enter your Health Spending Account Allocation amount. It can be any value from $ 0.00 up to your total Spending Account amount.

Using the **EXAMPLE** above, you could enter any amount up to 1100.00. If you entered $500.00 in your Health Spending Account, your Wellness Spending Account amount would be automatically updated to $600.00. (Your total Spending Account amount will equal $1,100.00).

Once you have entered the amounts you wish to allocate and have read and understood the following statements:

1. **I understand that my 2013 allocation is irrevocable after Dec. 14, 2012 and is legally binding. I will have the opportunity to reallocate on an annual basis.**
2. **I agree that my Spending Account will be allocated as indicated above.**

You can click on the Submit button to update your allocation. The following message will appear:

✓ Your Spending Account Allocation was submitted successfully.

Please Note: If you receive the message "**"Spending account must be in a $ amount."** on your screen, it means you can not submit without entering a number in the amount (if you see NaN (not a number) in one of the amounts, it means you have blanked out the amount, please enter 0 or the amount you wish to allocate.**)**

This is the record of your allocation decision. If you wish a copy for your records, please print the screen.

Updating your Flexible Spending Account Allocation Form

If you wish to change your allocation before the annual due date, go back into the form (your Flexible Spending Account Allocation Form displays your current allocation amount), make your changes, read the statements and click on the Submit Changes

Please Note: If you receive the message "**"Spending account must be in a $ amount."** on your screen, it means you can not submit without entering a number in the amount (if you see NaN (not a number) in one of the amounts, it means you have blanked out the amount, please enter 0 or the amount you wish to allocate.**)**