

# MONEYPLUS ENROLLMENT FORM

## Plan Year 2016



Administered by:  
**WageWorks**

P.O. Box 14766, Lexington KY 40512-4766

**You must complete this form if you wish to start a tax-free Medical Spending and/or Dependent Care Spending Account or to enroll in or change a Health Savings Account.**

Please be sure to read the IMPORTANT information on the back of this form. Submit your completed form to your Benefits Administrator. Please press hard with a black ballpoint pen.

Name (Please Print) Last		First		MI	Social Security #	
Mailing Address Street (HSA participants cannot list a P.O. Box.)		City		State	ZIP Code	Date of Birth
Physical Address Street		City		State	ZIP Code	
Daytime Phone	Home Phone		Date of Hire	Email Address		

Complete **Section A** to enroll in or to change a **Health Savings Account**. (Additional forms will be required to establish your HSA. Refer to your *Tax-Favored Accounts Guide* for more information.) If you would also like to enroll in a **limited-use Medical Spending Account** for eligible dental and vision expenses, complete **Section B**. To enroll in a **Medical Spending Account**, complete **Section C**. To enroll in a **Dependent Care Spending Account**, complete **Section D**. In **Box #1**, indicate the dollar amount you elect to contribute for the upcoming plan year. In **Box #2**, indicate the number of regular payroll checks you will receive during the upcoming plan year. In **Box #3**, indicate the reduction amount per paycheck. (Note: If Box #2 times Box #3 does not equal Box #1 exactly, the amount in Box #3 may be changed slightly by WageWorks, due to rounding.)

**IF YOU ENROLL IN A HEALTH SAVINGS ACCOUNT (SECTION A), YOU CANNOT ENROLL IN A MEDICAL SPENDING ACCOUNT (SECTION C), BUT MAY ENROLL IN A LIMITED-USE MEDICAL SPENDING ACCOUNT (SECTION B).**

A Health Savings Account (Additional forms are required.)			B Limited-Use Medical Spending Account	
<input type="checkbox"/> NEW ACCOUNT <input type="checkbox"/> CONTRIBUTION AMOUNT CHANGE			<input type="checkbox"/> NEW ENROLLMENT <input type="checkbox"/> RE-ENROLLMENT (Available to HSA Participants only)	
Select which type of SHP Savings Plan coverage you have: <input type="checkbox"/> Individual (\$3,350 maximum in 2016) <input type="checkbox"/> Family (\$6,750 maximum in 2016) <input type="checkbox"/> Over 55 Catch-up (additional maximum \$1,000)			Receive reimbursement for eligible dental and vision expenses incurred by you, your family members or both. Maximum allowable contribution is \$2,550 annually.	
	<b>EMPLOYEE</b>	<b>FOR BA USE ONLY: EMPLOYER</b>		
<b>Box #1</b> 2016 Plan Year Total Dollar Amount (January 1, 2016 – December 31, 2016)			<b>Box #1</b> 2016 Plan Year Total Dollar Amount (January 1, 2016 – December 31, 2016)	
<b>Box #2</b> Number of Regular Paychecks ÷			<b>Box #2</b> Number of Regular Paychecks ÷	
<b>Box #3</b> Reduction per Regular Paycheck = <small>Wells Fargo will deduct a \$1.75 monthly administrative fee from your HSA. Your employer will deduct a \$1.50 monthly administrative fee from your paycheck.</small>			<b>Box #3</b> Reduction per Regular Paycheck = <small>Your employer will automatically deduct the monthly fee of \$3.14 in addition to the above amounts.</small>	

C Medical Spending Account	D Dependent Care Spending Account (for child/adult day care)
<input type="checkbox"/> NEW ENROLLMENT <input type="checkbox"/> RE-ENROLLMENT	<input type="checkbox"/> NEW ENROLLMENT <input type="checkbox"/> RE-ENROLLMENT
Receive reimbursement for eligible medical expenses incurred by you, your family members or both. Maximum allowable contribution is \$2,550 annually.	Tax filing status, please check one <input type="checkbox"/> Married, filing separate (Maximum - \$2,500) <input type="checkbox"/> Single, head of household (Maximum - \$5,000) <input type="checkbox"/> Married, filing joint (Maximum - \$5,000)
<b>Box #1</b> 2016 Plan Year Total Dollar Amount (January 1, 2016 – December 31, 2016)	<b>Box #1</b> 2016 Plan Year Total Dollar Amount (January 1, 2016 – December 31, 2016)
<b>Box #2</b> Number of Regular Paychecks ÷	<b>Box #2</b> Number of Regular Paychecks ÷
<b>Box #3</b> Reduction per Regular Paycheck = <small>Your payroll center will automatically deduct the monthly fee of \$3.14 in addition to the above amounts.</small>	<b>Box #3</b> Reduction per Regular Paycheck = <small>Your payroll center will automatically deduct the monthly fee of \$3.14 in addition to the above amounts.</small>

Please read reverse side before signing this form below.

	<b>EMPLOYEE SIGNATURE:</b>	<b>DATE:</b>

<b>FOR BA USE ONLY:</b>	For MONEYPLUS eligibility purposes, I certify that this employee is eligible for the Account(s) in which the employee is enrolling. If the employee has enrolled in an HSA, I certify that the employee is also enrolled in the State Health Plan Savings Plan, and, if applicable, has correctly accounted for the Employer Contribution.			
	<b>EMPLOYER/BENEFITS ADMINISTRATOR SIGNATURE:</b>		<b>DATE:</b>	
	Effective Date	Payroll Date	Employer	Payroll Frequency    Group Number

<b>ADMINISTRATOR USE ONLY</b>	DATA ENTRY	VERIFICATION	SCANNED	INDEXED
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**BENEFITS ADMINISTRATORS: Send signed form to Enrollment Processing, P.O. Box 14766, Lexington KY 40512-4766**

# IMPORTANT

## General (applies to all sections)

- I hereby authorize my employer to reduce my gross salary, before taxes are calculated, by the total amount of annual salary deduction indicated on reverse.
- I understand that the funds in one account cannot be used to reimburse expenses covered by another account.
- I understand that expenses for which I am reimbursed cannot be deducted on my income tax return.
- I certify that I expect to receive the number of paychecks listed in Box #2 of any and all sections, unless the early retirement/termination box is also selected.

## Health Savings Accounts (Section A)

- I understand when starting an HSA and electing my initial HSA contribution amount, **I am required to complete additional forms available through the custodial bank link (Open HSA Bank Account) on PEBA's insurance benefit website.** (Refer to your *Tax-Favored Accounts Guide* for more information.) I also understand my HSA will not be created until this documentation is properly completed and received by the HSA Custodian.
- If I have enrolled in an HSA, I certify that I am covered by the State Health Plan Savings Plan (high-deductible health plan), and I am not covered by a health plan other than the Savings Plan that provides any of the same benefits as a HDHP. I have reviewed and agree to the terms and conditions found in the Health Savings Custodial Account, Disclosure Statement and Funds Availability Disclosure Statement amendments thereto. (*Contact your benefits administrator for a copy of this statement.*) I assume sole responsibility for all consequences relating to my actions concerning this HSA. I understand that I may revoke this HSA on or before seven (7) days after the date of establishment as outlined in the Funds Availability Disclosure Statement. (*Contact Customer Care at 800.342.8017.*) I have not received any tax or legal advice from the custodian, and I will seek the advice of my own tax or legal professional to ensure my compliance with related laws. I release and agree to hold the HSA custodian harmless against any and all claims or losses arising from my actions. I also understand: 1) the HSA maximum contributions, established by the federal government and subject to change, are tied to the rate of inflation; 2) the maximum monthly contribution is calculated based on the annual allowable amount and number of months remaining in the contribution year; and 3) a subscriber age 55 and older may make "catch-up" contributions to an HSA. In 2016, that subscriber can contribute up to \$1,000 above the limit.
- **I understand I can change my HSA contribution once a month.** The change is effective at the beginning of the first month after the change is requested. Re-enrollment is not required each plan year.

## Spending Accounts (Sections B, C & D)

- I understand that the funds in any spending account can only be paid to reimburse payment of eligible expenses actually incurred during my period of coverage and any applicable grace period. (There is no grace period for Dependent Care Spending Accounts.)
- I understand that any amount remaining in any spending account not used during this plan year, and following any applicable grace period (**ending March 15**) will be forfeited, since it cannot be carried forward to the next plan year. *You have a 90-day run-out period (until March 31) at the end of the plan year to request reimbursement of eligible spending account expenses incurred during your period of coverage within the plan year and any applicable grace period.*
- I understand that the amount of salary deduction will include the items specified on the reverse side of this form and will continue in effect unless I terminate employment or file an approved Change in Status form with the contract administrator within 31 days of the event.
- I understand and agree that my employer and WageWorks, the contract administrator, will not incur any liability resulting from either my participation in any account or my failure to sign or accurately complete this enrollment form. I further understand that if I elect not to participate in salary deduction with respect to the benefits listed on the reverse side, I hereby forego my right to participate during the upcoming plan year.
- I certify that: 1) I will only use my spending account to pay for IRS-qualified expenses eligible under my employer's plan, and only for me and my IRS-eligible dependents; 2) I will exhaust all other sources of reimbursement, including those provided under my employer's plan(s) before seeking reimbursement from my spending account; 3) I will not seek reimbursement through any additional source; and 4) I will collect and maintain sufficient documentation to validate the foregoing.

**Note:** Employees who participate in both a Medical Spending Account (either limited-use or regular) and a Dependent Care Spending Account will only pay one \$3.14 monthly fee.

## Direct Deposit Authorization

I hereby authorize WageWorks, to initiate credit entries to the custodian bank for deposit into my HSA in accordance with my HSA election. I also authorize it to initiate, if necessary, debit entries and adjustments for any credit entries made in error. This authorization is to remain in full force and effect until WageWorks has received written notice from me of its termination in such time and manner as to afford WageWorks and the custodial bank a reasonable opportunity to act on it.