

FSA EMPLOYER ENROLLMENT CHECKLIST

- Prepare Enrollment material. The following enrollment forms can be printed from our website www.hradministrators.com/forms/administrators: Enrollment checklist, FSA Enrollment Form, FSA Q & A booklet and Over-the-counter Listing. If applicable, call to schedule Enrollment Meeting(s) with a Human Resource Administrators, Inc. Representative.
- Hold employee information meetings. An educational DVD for employee presentations may be requested from Human Resource Administrators, Inc., if desired.
- Distribute a blank FSA Enrollment Form to all eligible employees. (For your convenience, a blank enrollment form has been attached. Also, attached is a Q & A Booklet with a list of qualifying expenses as well as how to calculate tax savings). Other informative material such as IRS Publications 502 and 503 are posted on our Website at www.HRAdministrators.com. (Although these IRS Publications are designed for other tax purposes, they can generally be used as a guide to qualifying expenses.) ***Please note: Employees already enrolled in the current plan year will receive an Enrollment Kit at their home within the next few weeks from Human Resource Administrators, Inc. (unless otherwise previously specified by you).*** However all newly eligible employees, as well as eligible employees who are not currently participating, will need to complete an FSA Enrollment Form in order to join the plan. If applicable, current participants in the premium only portion of your plan DO NOT need to complete a new POP (Premium Only Plan) Enrollment form if there are no changes to their elected coverage(s).
- Collect completed employee Enrollment Forms. Double-check that ALL forms are SIGNED and DATED by the participant and the employer's Authorized Representative. ***This year, elections will be calculated by a different formula. Take the number of pays x the per pay amount to arrive at the annual election. For example, a participant that wishes to elect \$1000 and has 26 pays, the election would actually be \$999.96 (38.46 x 26 = \$999.96).***
- Update payroll records to accurately reflect new election information. It is your responsibility to set each employee's per pay deductions correctly by the first pay of the new plan year.
- Send the following items to Human Resource Administrators, Inc. by December 9, 2005:**
 - Spreadsheet summarizing employee enrollment information in electronic format. Attached is an enrollment_payroll contribution spreadsheet as well as instruction for completing it.
 - If you are currently submitting contributions via a paper check, please consider using Electronic Funds Transfer. Utilizing Electronic Funds Transfer assists with the expediting of contribution processing and claim reimbursement. Attached is an Electronic Fund Transfer Authorization Form for your convenience. This may be sent via fax or mail. *If you wish to continue to send the contributions via checks, this form is not necessary.*
- For questions or assistance regarding this information please contact:**

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Thank you.