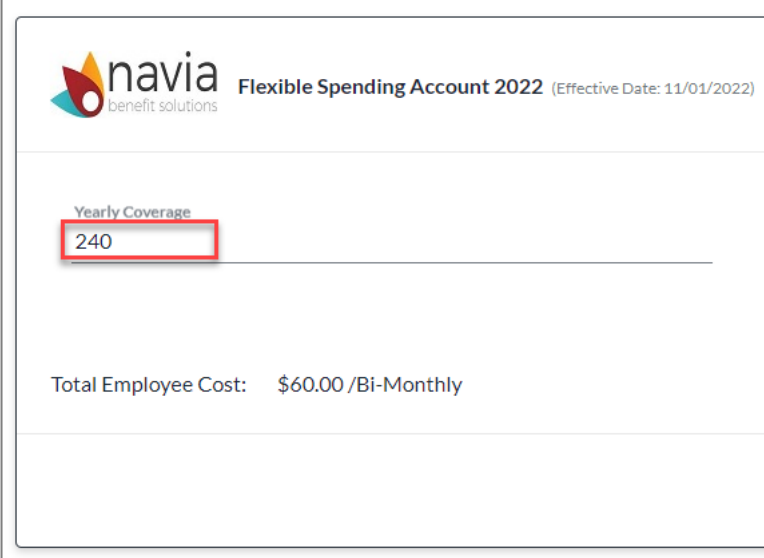
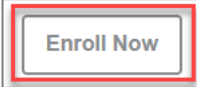
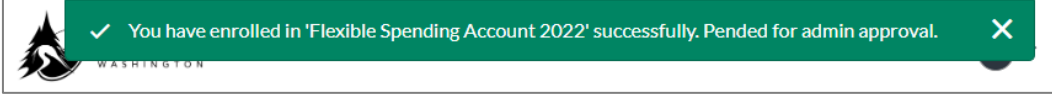
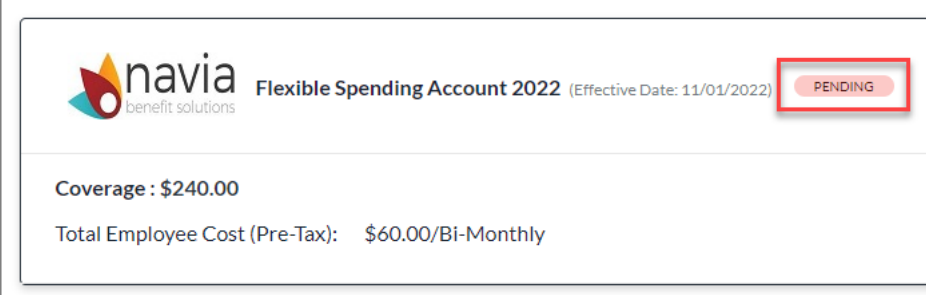


Standard Operating Procedure: Workterra Flexible Spending Account Enrollment



Purpose: Health Care Flexible Spending Accounts (FSA) have a maximum contribution of \$2,850 per plan year (\$3,050 max. in 2023). Day Care FSA has a maximum of \$5,000 per plan year (\$2,500 if married, filing separately).

Audience: Benefits eligible employees

Step	What to do	Visual Aid
1	<p>Type the annual amount that you would like deducted in the "Yearly Coverage" box and hit the Tab key. The system will calculate the bi-monthly amount that will be payroll deducted based on the number of pay periods remaining in the benefit year. (The Effective Date at the top right shows when the deductions would begin.)</p> <p>Note: To determine the bi-monthly deductions for other amounts, repeat the steps above (i.e., enter another amount and hit Tab).</p>	
2	<p>When ready, click the "Enroll Now" button.</p>	
3	<p>A banner will indicate successful enrollment and may also indicate "Pended for admin approval" if further HR review is needed.</p>	
4	<p>The Flexible Spending Account benefit will display as PENDING if you enroll outside of your new hire period.</p>	

Standard Operating Procedure: Workterra Flexible Spending Account Enrollment



Verification of competency: A person is considered to have mastered this task when they can perform all steps listed above without any assistance.

Revision History		
Revision Date	Summary of revision	Revision Author
10/3/2022	Initial development of SOP	D Emami
11/22/2022	SME Review	N Bruce