



CAFETERIA PLAN ADVISORS
 – An Alera Group Company –
 120 Longwater Dr., Suite 102
 Norwell, MA 02061
 Tel.: 781-848-9848

Authorization for Pre-Tax Payroll Reduction

Enrollment Deadline is 5/31/2023.

*** Late Enrollments not Accepted. ***

INSTRUCTIONS: If Already in Plan: *Re-enrollment is NOT automatic!* To enroll for the new plan year via your online account portal, go to cpaemployee.lh1ondemand.com—*not the app*. Log-in on the *left* side of the sign-in screen. Once on your account homepage, click the blue **ENROLL/RE-ENROLL** button and follow the steps to enroll; click *Submit* at the end. (We recommend printing or saving your enrollment confirmation.)

New Enrollees: Complete & return this form to CPA via e-mail (info@cpa125.com) or fax (781-848-8477).

1 Personal Information:

**Southwick-Tolland-Granville
Regional School District**

Participant Name: _____ **Employer:** _____

Mailing Address: _____ **Plan Year:** **7/1/2023 to 6/30/2024**
 (for expenses incurred between these dates, plus an additional 75 days for Health Care FSA expenses)

City/Town, State: _____ **ZIP:** _____ **SSN:** _____ **DOB:** _____

E-Mail: _____ **Daytime Phone:** _____ ☐ personal ☐ work

2 I am paid: ☐ Bi-weekly 26 ☐ Bi-weekly 26 Lump

3 Flexible Spending Account (FSA) Benefit Election:

Health Care FSA Election: \$ _____ for the plan year for employee, legal spouse, and eligible dependents' qualified medical, dental, vision expenses. *Benefit card included.*

Maximum Annual Election Amount: **\$3,050.**

- **Ineligibility Note:** Per IRS rules, you are NOT eligible for the Health Care FSA plan if you or your spouse have a Health Savings Account ("HSA").
- **Grace Period.** Participants have an extra 75 days at the end of the plan year to continue to use any remaining balance from the plan year, if any.
- See Open Enrollment flyer for more plan info.

4 Direct Deposit Info.

Direct deposit is our preferred method of expense reimbursement. Unless your banking info. is already on file with Cafeteria Plan Advisors, please set up direct deposit online via your account portal once you receive enrollment confirmation.

5 Certification. I hereby authorize a salary reduction agreement for the amount(s) shown above and understand that:

- Cafeteria Plan Advisors will hold these funds until eligible expenses are incurred and a claim is submitted. FSA expenses must be consistent with allowable deductions under Internal Revenue Service (IRS) Publication 969, and funds may be forfeited in accordance with the same publication if eligible balance isn't incurred and/or submitted for reimbursement by plan year deadline.
- All claims for the Plan Year must be submitted within ninety (90) days of the end of the Plan Year.
- **This election cannot be revoked or changed** during the plan year unless the participant experiences a qualifying event as defined by the IRS.
- **Current participants must enroll each plan year; re-enrollment is not automatic.**
- **Health Care FSA cards**, if offered through your employer's plan, **will reload** at the start of each plan year when you re-enroll; **keep until they expire.**
- Additional certification for Dependent Care Plan Participants: I understand that the Dependent Care Reimbursement Plan Guidelines can be found at CPA125.com and I qualify to participate in the FSA Dependent Care plan. I agree to notify the plan administrator in writing within 30 days should I experience a change in need or no longer meet the IRS's eligibility criteria. Dependents must qualify under regulations set forth in IRC sections 152 and 129.
- **Tax advice:** It is suggested you consult with a tax advisor to determine your tax savings and/or limits on tax deductions.

➤ **Signature:** _____ **Date:** _____

A system-generated e-mail confirmation will be sent once your enrollment is processed.