

Flexible Spending Accounts (FSAs) and Commuter Accounts

Administered by ASIFlex



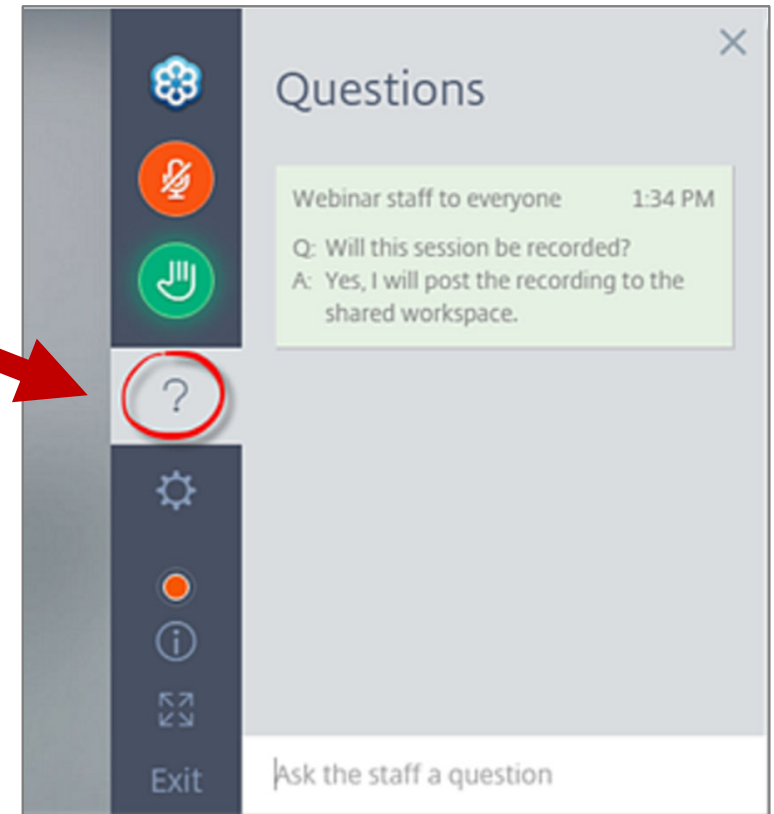
www.asiflex.com/ORPEBB

Presented by:
Linda Freeze



Webinar Tips

- ✓ Type in questions anytime during the live webinar. Questions will be answered at the end of the presentations.
- ✓ You will receive a follow-up email when the recording is available.
- ✓ Captions will be included in the recording.
- ✓ Additional benefit information is available at PEBBinfo.com.



Confirmation Letters and Corrections

- **Health Care FSA and Dependent Care FSA**
- **Parking and Transportation Commuter Accounts**

ASIFlex Confirmation Letters


ASIFlex members will receive one USPS mailing and one email for each ASIFlex benefit enrollment (FSAs, Commuter)


Letters are printed on different colors of paper depending on the type of enrollment:

- **Health Care FSA = Blue**
- **Dependent Care FSA = Pink**
- **Parking Account = Orange**
- **Transportation Account = Green**



Four Letters: Did you get one?

 **pebb**
Public Employees' Benefit Board
Kate Brown, Governor
November 8, 2019

 **Health**
Authority
Public Employees' Benefit Board
500 Summer Street NE, E-89
Salem, Oregon 97301-1063
Phone: 503-373-1102
Fax: 503-373-1654
www.oregon.gov/oha/PEBB
Email: inquiries.pebb@state.or.us

Dear PEBB Member:
IMPORTANT INFORMATION ABOUT YOUR DEPENDENT CARE FLEXIBLE SPENDING ACCOUNT* (DCFSA)
You may need to act to correct your PEBB benefit plan by December 20, 2019!

You are currently enrolled in a Dependent Care Flexible Spending Account (DCFSA) effective January 1, 2020.
You have chosen to contribute \$ 400.00 per month with 12 monthly withdrawals from your paycheck. Is this correct?
With a DCFSA you may deduct money from your paycheck pre-tax. You can then use this money to pay for the care of a qualified person. Expenses must be work-related and incurred during the months your account was active.

A DCFSA is this the account you mean to enroll in?

PEBB is hosting an informational webinar on Tuesday, November 19th at 10 am to answer questions regarding your ASIFlex enrollments. Register at www.PEBBWebinars.com.


There are specific rules that apply to DCFSA Accounts. For a complete list, please visit <http://www.asiflex.com/Commuter.aspx>.


You will need to act right away if you find that:
• You are enrolled in the wrong account.
• Your contribution amount is wrong.

You have until **December 20, 2019** to request a correction. You can do this by faxing a 2020 Commuter Program form to **PEBB at 503-373-1654**. You can find the form at: https://www.oregon.gov/oha/PEBB/FORMS/Commuter_Account.pdf

You don't need to take any action if you are enrolled correctly.
Note: If you do not send in a correction by December 20, 2019, your Transportation Commuter Account contributions will continue until you stop the deduction. PEBB will not be able to reimburse any contributions you made before you stopped the deduction.

PEBB Customer Service

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Dear PEBB Member:
IMPORTANT INFORMATION ABOUT YOUR PARKING COMMUTER ACCOUNT
You may need to act to correct your PEBB benefit plan by December 20, 2019!

You are currently enrolled in a Parking Commuter Account effective January 1, 2020.
You have chosen to contribute \$ 75.00 per month from your paycheck. Is this correct?
With a Parking Commuter Account, you may deduct money from your paycheck pre-tax. You can then use this money to pay for parking at or near your work location for the months your account was active in the plan year.
If you already have parking costs withheld from your paycheck, you should not be enrolled in a PEBB Parking Commuter Account.

Are you eligible for this account?

PEBB is hosting an informational webinar on Tuesday, November 19th at 10 am to answer questions regarding your ASIFlex enrollments. Register at www.PEBBWebinars.com.


There are specific rules that apply to Parking Commuter Accounts. For a complete list, please visit <http://www.asiflex.com/Commuter.aspx>.


You will need to act right away if you find that:
• You are enrolled in the wrong account.
• Your contribution amount is wrong.

You have until **December 20, 2019** to request a correction. You can do this by faxing a 2020 Commuter Program form to **PEBB at 503-373-1654**. You can find the form at: https://www.oregon.gov/oha/PEBB/FORMS/Commuter_Account.pdf

You don't need to take any action if you are enrolled correctly.
Note: If you do not send in a correction by December 20, 2019, your Transportation Commuter Account contributions will continue until you stop the deduction. PEBB will not be able to reimburse any contributions you made before you stopped the deduction.

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Dear PEBB Member:
IMPORTANT INFORMATION ABOUT YOUR TRANSPORTATION COMMUTER ACCOUNT
You may need to act to correct your PEBB benefit plan by December 20, 2019!

You are currently enrolled in a Transportation Commuter Account effective January 1, 2020.
You have chosen to contribute \$ 75.00 per month from your paycheck. Is this correct?
With a Transportation Commuter Account, you may deduct money from your paycheck pre-tax. You can then use this money to pay for work-related commuting expenses like van pools and bus passes for the months your account was active in the plan year. *It does not include parking or use of personal vehicles or bikes.*

If you already have transit costs withheld from your paycheck, you should not be enrolled in a PEBB Transportation Commuter Account. Are you eligible for this account?

PEBB is hosting an informational webinar on Tuesday, November 19th at 10 am to answer questions regarding your ASIFlex enrollments. Register at www.PEBBWebinars.com.

There are specific rules that apply to Transportation Commuter Accounts. For a complete list, please visit: <http://www.asiflex.com/Commuter.aspx>

You will need to act right away if you find that:
• You should not be enrolled in this account.
• You do not have eligible commuter expenses.
• Your contribution amount is wrong.

You have until **December 20, 2019** to request a correction. You can do this by faxing a 2020 Commuter Program form to **PEBB at 503-373-1654**. You can find the form at: https://www.oregon.gov/oha/PEBB/FORMS/Commuter_Account.pdf

You don't need to take any action if you are enrolled correctly.
Note: If you do not send in a correction by December 20, 2019, your Transportation Commuter Account contributions will continue until you stop the deduction. PEBB will not be able to reimburse any contributions you made before you stopped the deduction.

PEBB Customer Service



Kate Brown, Governor

November 8, 2019

Dear PEBB Member:

IMPORTANT INFORMATION ABOUT YOUR HEALTH CARE FLEXIBLE SPENDING ACCOUNT* (HCFSAs) You may need to act to correct your PEBB benefit plan by December 20, 2019!

You are currently enrolled in a Health Care Flexible Spending Account (HCFSAs) effective January 1, 2020.
You have chosen to contribute \$ 100.00 per month with 12 monthly withdrawals from your paycheck. Is this correct?

With a HCFSAs you may deduct money from your paycheck pre-tax. You can then use this money to pay for uncovered or partially covered medical, dental or vision expenses during the months your account was active in the plan year.

Is this the account you meant to enroll in?

PEBB is hosting an informational webinar on Tuesday, November 19th at 10 am to answer questions regarding your ASIFlex enrollments. Register at www.PEBBWebinars.com.

There are specific rules that apply to HCFSAs. For a complete list, please visit: <http://www.asiflex.com/HCFSAs.aspx>.

You will need to act right away if you find that:

- You are enrolled in the wrong account.
- Your contribution amount is wrong.

Note: If you are an OUS or ODE employee with less than 12 paychecks in the plan year, check the monthly withdrawal to confirm the months are correct.

You have until **December 20, 2019** to request a correction. You can do this by faxing a FSA Open Enrollment Correction form to **PEBB at 503-373-1654**. You can find the form at: <https://www.oregon.gov/oha/PEBB/FORMS/Flexible-Spending-Open-Enrollment.pdf>

You don't need to take any action if you are enrolled correctly.

Note: If you do not send in a correction by December 20, 2019, your HCFSAs contributions will continue through December 2020. You may then only make changes to your 2020 account if you have a qualifying event.

PEBB Customer Service

*Health Care Flexible Spending Accounts are subject to non-discrimination testing.



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ASIFlex Confirmation Letters

The purpose of PEBB sending the letters and emails is to:

- Confirm the account(s) you selected during Open Enrollment are correct
- Explain how the account(s) work, what's covered, and what's not allowed
- Confirm your monthly contribution amount
- Confirm the number of months you plan to contribute
- Explain rules for making corrections
- Provide corrections deadline and penalties for not making corrections, if needed



Blue Letter: Health Care FSA



Kate Brown, Governor

November 8, 2019



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Dear PEBB Member:

**IMPORTANT INFORMATION ABOUT YOUR HEALTH CARE FLEXIBLE SPENDING ACCOUNT* (HCFSAs)
You may need to act to correct your PEBB benefit plan by December 20, 2019!**

You are currently enrolled in a Health Care Flexible Spending Account (HCFSAs) effective January 1, 2020. You have chosen to contribute **\$ 100.00** per month with 12 monthly withdrawals from your paycheck. Is this correct?

With a HCFSAs you may deduct money from your paycheck pre-tax. You can then use this money to pay for uncovered or partially covered medical, dental or vision expenses during the months your account was active in the plan year.

Is this the account you meant to enroll in?

PEBB is hosting an informational webinar on Tuesday, November 19th at 10 am to answer questions regarding your ASIFlex enrollments. Register at www.PEBBWebinars.com.

There are specific rules that apply to HCFSAs. For a complete list, please visit: <http://www.asiflex.com/HCFSAs.aspx>.

You will need to act right away if you find that:

- You are enrolled in the wrong account.
- Your contribution amount is wrong.

Note: If you are an OUS or ODE employee with less than 12 paychecks in the plan year, check the monthly withdrawal to confirm the months are correct.



Pink Letter: Dependent Care FSA



Kate Brown, Governor

November 8, 2019



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You have chosen to contribute \$ 400.00 per month with 12 monthly withdrawals from your paycheck. Is this correct?

With a DCFSA you may deduct money from your paycheck pre-tax. You can then use this money to pay for the care of a qualified person. Expenses must be work-related and incurred during the months your account was active in the plan year. This usually means day care expenses for an eligible child under age 13.

A DCFSA cannot be used for medical, dental or vision expenses.

Is this the account you meant to enroll in?

PEBB is hosting an informational webinar on Tuesday, November 19th at 10 am to answer questions regarding your ASIFlex enrollments. Register at www.PEBBWebinars.com.

There are specific rules that apply to DCFSAs. For a complete list, please visit:
<http://www.asiflex.com/DCFSA.aspx>.



Flexible Spending Account (FSA) Corrections

Act now to correct your:

- Enrollment (change/cancel)
- Contribution amount

Important!

- You can only make changes to your FSA enrollment during the FSA correction period, ending December 13, 2024.
- If you don't make changes during the correction period, your FSA contributions will continue through December 2025.
- After the correction period, you can only make changes to your FSA with a Qualified Status Change (QSC).



Flexible Spending Account (FSA) Corrections

pebb
Public Employees' Benefit Board

2025 Open Enrollment & Correction
Healthcare Flexible Spending Account (HC FSA)
Dependent Care Flexible Spending Account (DC FSA)

Open Enrollment 10/01/2024 -10/31/2024
FSA Correction Period 11/01/2024-12/13/2024

Office use only
Approved by: _____
Approved date: _____
Effective date: _____

All current FSA accounts terminate 12/31 each year. To have an FSA in 2025 you must sign up during Open Enrollment (10/01-10/31). You cannot make an Open Enrollment Correction without completing Open Enrollment.

Enrollment type

Open Enrollment FSA (new enrollment for 2025 plan year)

Open Enrollment correcting elections.
I am making a correction to my FSA:
 Amount Type Number of withdrawal months

Cancel my Healthcare FSA Cancel my Dependent Care FSA

Enrolling in (check all that apply)

Healthcare FSA Dependent Care FSA

Contact information (you must complete all fields)

PEBB benefit number (P#####), OR#, University ID or Lottery ID

Last name _____ First name _____ Middle _____ Gender M F Other

Check if new address

Contact address _____ Apartment # _____ City _____ State _____ ZIP _____

Residence ZIP code _____ Work ZIP code _____ Work email _____ Personal email (optional) _____

Date of birth (mm/dd/yyyy) _____ Work phone _____ Home phone (optional) _____

Page 1 of 3 MSC 5516 (09/2024)

Download and submit:
2025 FSA Open Enrollment and
Correction Form (MSC 5516)

Find the form at:
[PEBBinfo.com](https://pebbinfo.com) > Resources > Forms



Golden Letter: Parking



Public Employees' Benefit Board

Kate Brown, Governor

November 8, 2019



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Dear PEBB Member:

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You have chosen to contribute \$ 75.00 per month from your paycheck. Is this correct?

With a Parking Commuter Account, you may deduct money from your paycheck pre-tax. You can then use this money to pay for parking at or near your work location for the months your account was active in the plan year.

If you already have parking costs withheld from your paycheck, you should not be enrolled in a PEBB Parking Commuter Account.

Are you eligible for this account?

PEBB is hosting an informational webinar on Tuesday, November 19th at 10 am to answer questions regarding your ASIFlex enrollments. Register at www.PEBBWebinars.com.

There are specific rules that apply to Parking Commuter Accounts. For a complete list, please visit:
<http://www.asiflex.com/Commuter.aspx>.

You will need to act right away if you find that:



Green Letter: Transportation



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Kate Brown, Governor

November 8, 2019



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Dear PEBB Member:

IMPORTANT INFORMATION ABOUT YOUR TRANSPORTATION COMMUTER ACCOUNT
You may need to act to correct your PEBB benefit plan by December 20, 2019!

You are currently enrolled in a Transportation Commuter Account effective January 1, 2020.

You have chosen to contribute **\$ 75.00** per month from your paycheck. Is this correct?

With a Transportation Commuter Account, you may deduct money from your paycheck pre-tax. You can then use this money to pay for work-related commuting expenses like van pools and bus passes for the months your account was active in the plan year. ***It does not include parking or use of personal vehicles or bikes.***

If you already have transit costs withheld from your paycheck, you should not be enrolled in a PEBB Transportation Commuter Account. Are you eligible for this account?

PEBB is hosting an informational webinar on Tuesday, November 19th at 10 am to answer questions regarding your ASIFlex enrollments. Register at www.PEBBWebinars.com.

There are specific rules that apply to Transportation Commuter Accounts. For a complete list, please visit: <http://www.asiflex.com/Commuter.aspx>.

You will need to act right away if you find that:

- You should not be enrolled in this account.



Commuter Account Corrections

Act now to correct your:

- Enrollment (change/cancel)
- Contribution amount


If you already have parking expenses withdrawn directly from your paycheck, you are not eligible for the Parking Reimbursement program. If you enrolled by error, act now to cancel your enrollment.

Important!

You can change or cancel commuter accounts anytime, but **we can't refund money**. After six months of no activity, accounts become inactive, and the funds default to PEBB.



Commuter Account Corrections

 **2025 Commuter Program**
Public Employees' Benefit Board
For more information go to <http://orpebb.asiflex.com>

Office use only	
Approved by:	
Approved date:	
Effective date:	

If you already have parking expenses withdrawn directly from your paycheck DO NOT sign up for this program.

Contact information (You must complete all fields.)

PEBB benefit number (P#####), OR#, University ID or Lottery ID

Last name First name Middle Gender M F Other

Check if new address

Contact address Apartment # City State ZIP

Residence ZIP code Work ZIP code Work email Personal email (optional)

Date of birth (mm/dd/yyyy) Work phone Home phone (optional)

Parking
DO NOT enroll for this account if you have state parking and the cost of parking is deducted from your monthly pay as pre-tax and you have no other parking costs. The PEBB Parking account is not used to pay for monthly state lot parking.

New election
 Change my monthly parking contribution
 Cancel election

1. Parking Account Monthly contribution (minimum \$20)
(Maximum monthly contribution or reimbursement is \$315.00) \$ _____

1a. I am changing my monthly parking election amount. From: \$ _____ To: \$ _____

Page 1 of 2 MSC 5515 (09/2024)

Download and submit:
2025 Commuter Program Enrollment
Form (MSC 5515)

Find the form at:
PEBBinfo.com > Resources > Forms



ASIFlex Corrections

Before January 1, 2025:

- You must request changes to your 2025 FSA by **December 13, 2024**.
- Updates will be effective January 1, 2025.
- If you didn't enroll during Open Enrollment in October, you can't sign up for an FSA during the correction period.
- Make sure you understand your choices, amounts, and any penalties if you fail to make a change before January 1, 2025.



ASIFlex Corrections

As of January 1, 2025:

- All ASIFlex issues go to PEBB as appeals.
- No Health Care or Dependent Care FSA cancellations or changes unless you experience a Qualified Status Change (QSC).
- No retroactive FSA corrections or enrollments (members may lose money).
- No mid-year enrollments or prospective increases/decreases without a QSC.
- PEBB will adjust the number of months prospectively if you enroll mid-year with a QSC.



ASIFlex Corrections

University members only

- When enrolling online, be sure you select the correct number of contributions and indicate any months without contributions.
- Errors may impact your balance.

Summary for employee of 58030 Oregon State University		(Open)
Number of Contributions per year: <input checked="" type="radio"/> 9 <input type="radio"/> 10 <input type="radio"/> 11 <input type="radio"/> 12		No Contribution Months for the year: <input type="checkbox"/> June <input type="checkbox"/> July <input type="checkbox"/> August <input type="checkbox"/> September
Action	Plan Type/Plan Name	
Enroll	Dependent Care Flexible Spending Account	
Enroll	Health Care Flexible Spending Account	
Enroll	Transportation	
Enroll	Parking	
<hr/>		
Back Continue		



Understanding Your Flexible Spending Accounts (FSAs) and Commuter Accounts

Flexible Spending Accounts (FSAs)

What is an FSA?

- IRS-regulated spending account.
- Annual account to save pre-tax money for eligible expenses.
- Must enroll or re-enroll annually (enrollment does not carry over).
- Pretax contributions made through monthly payroll deductions.
- Pay for current year's eligible expenses.
- "Use it or lose it" – funds do not roll over at the end of the plan year.

Administrator:

- ASIFlex administers PEBB's FSA and Commuter Benefits.



Flexible Spending Accounts (FSAs)

IRS rules

- Enroll annually; elections last the plan year unless a Qualified Status Change (QSC) occurs.
- Not required to be covered under PEBB health insurance.
- Access full health care funds anytime during the year.
- Unused funds are forfeited if not used within the year.
- Expenses can be for spouse and dependent children (not domestic partners).
- Grace period extends 2.5 months (until March 15).



Flexible Spending Accounts (FSAs)

How FSAs work

1

Estimate your expenses for the upcoming year

2

Make pretax contributions via paycheck throughout the year

3

Incur eligible expenses

4

Submit claims to ASIFlex by the deadline

Get
reimbursed!



Flexible Spending Accounts (FSAs)

PEBB offers two types of FSAs

- **Health Care FSA:**

- Covers eligible medical, dental, and vision expenses
- Includes deductibles, copays, office visits, tests, supplies
- Find a full list of eligible expenses at <https://www.irs.gov/publications/p502>

- **Dependent Care FSA:**

- Covers your eligible dependent care expenses
- Includes childcare for children up to age 13 and care for dependent elders (daycare, after-school care, pre-school expenses)
- Find a full list of eligible expenses at <https://www.irs.gov/publications/p503>



Health Care FSA

Annual maximum

- \$3,200 per subscriber

Avoid forfeitures:

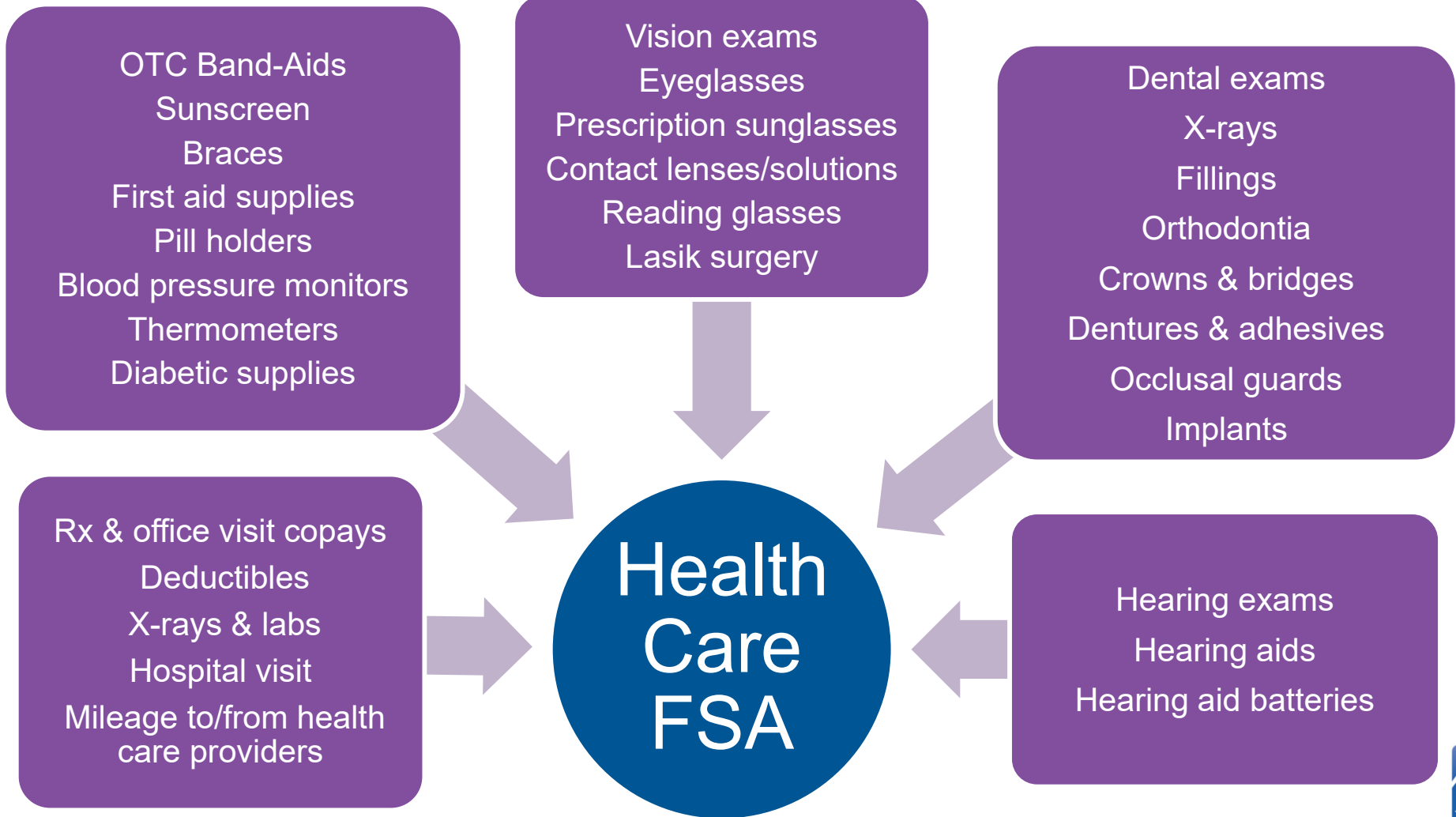
- Plan for predictable, recurring expenses.
- Review past expenses as a guide.
- Be conservative – elections are final once enrolled.
- Use these tools:
 - [ASIflex.com/ORPEBB](https://www.asiflex.com/ORPEBB) – expense estimator, eligible expense list
 - [FSASore.com](https://www.fsastore.com) for over-the-counter (OTC) products.
- Take advantage of the grace period – you have an extra 2.5 months to use your funds.

Use it or lose it!
Funds do not roll over to the next plan year.



Health Care FSA

Eligible expenses



Health Care FSA

Ineligible expenses

- Services not provided yet; pretreatment estimates
- Cosmetic treatments or medications
- Illegal operations
- Expenses paid by insurance
- Diapers, maternity clothes
- Insurance premiums
- Dancing, swimming lessons
- Holistic treatments, natural remedies, vitamins
- Warranties

Eligible FSA Expenses

Find a full list of eligible Health Care expenses:

<https://www.irs.gov/publications/p502>



Dependent Care FSA

Annual maximum

- \$5,000 per family
- \$2,500 if married and filing separate income tax returns
- See IRS Publication 503 for details:
<https://www.irs.gov/publications/p503>

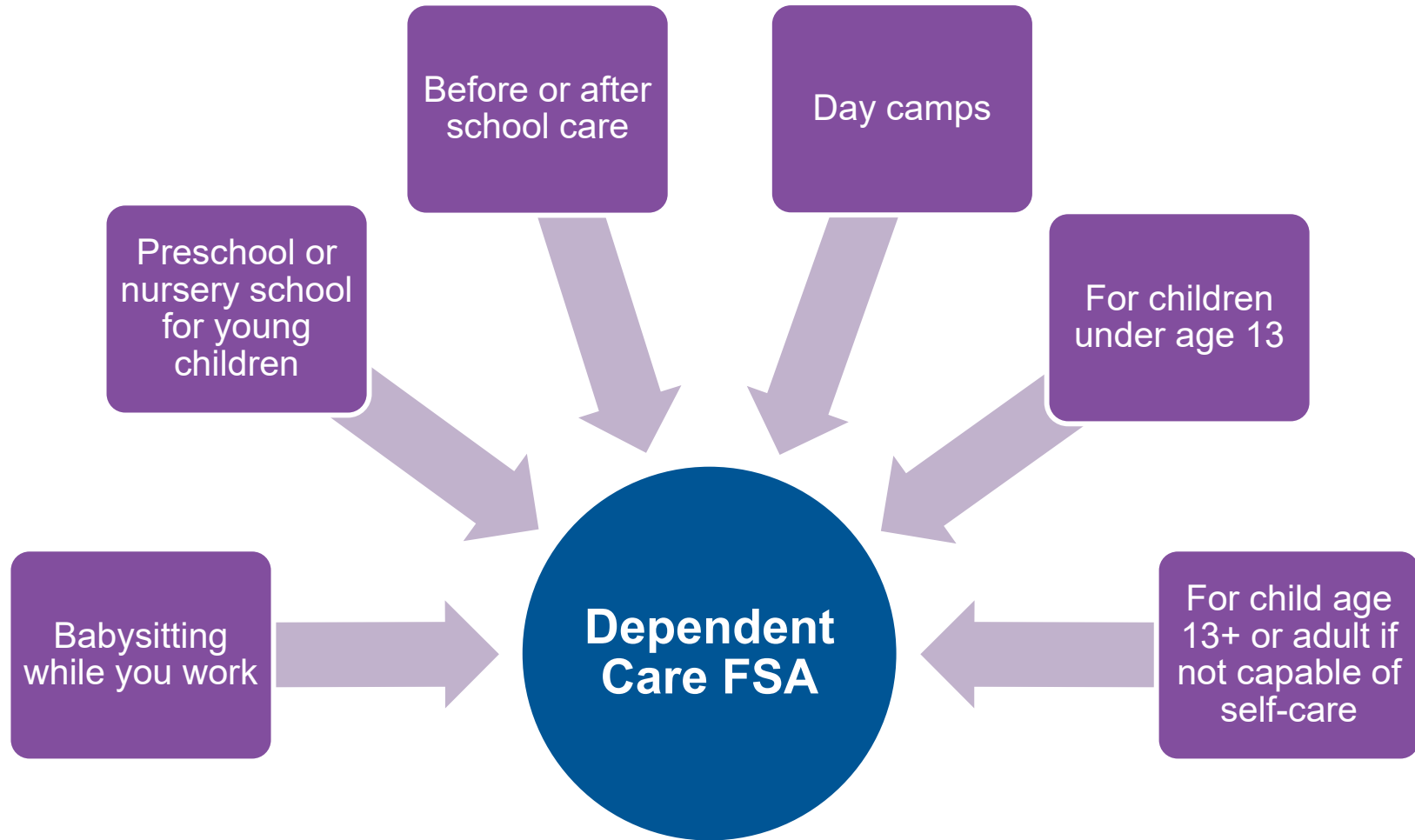
Use it or lose it!

Funds do not roll over to the next plan year.



Dependent Care FSA

Eligible expenses



Dependent Care FSA

Ineligible expenses

- Services not yet provided
- Educational or tuition expenses
- Kindergarten or higher education costs
- Overnight camp expenses
- Services during vacation, holidays, or leave of absence
- Only custodial parent's expenses eligible in divorce situations
- Expenses exceeding \$5,000 per family per calendar year

Eligible FSA Expenses

Find a full list of eligible Dependent Care expenses:

<https://www.irs.gov/publications/p503>



Dependent Care FSA

Helpful tips

- Start a Dependent Care FSA when you're ready to begin childcare, not at birth or during Open Enrollment.
- Notify PEBB within 30 days if your childcare situation changes in 2025 to adjust FSA contributions.
- Submit claims promptly to avoid losing funds.
- Dependent Care FSA cannot be used for healthcare expenses for your dependents.



Flexible Spending Accounts (FSAs)

Important dates

- Claims must be incurred between January 1 and March 15 of the following year (14 ½ months) or during your coverage period.
- Incurred means the service was received or the product secured, regardless of payment timing.
- Claims deadline: ASIFlex must **receive your claims by March 31** for expenses incurred the previous year.
- Submit early to avoid missing the deadline.



Commuter Benefit Accounts

How do they work?

- IRS-regulated account
- You can enroll, change, or cancel anytime
- Your election is month-to-month
- Make pretax contributions through payroll deductions
- Pay for current month commuting expenses
- Submit claims for parking or transit expenses incurred during your coverage period
- Reimbursements are capped at the IRS monthly limit
- Unused funds are forfeited after 6 months



Commuter Benefit Accounts

Two types: Parking and Transit

Parking Reimbursement Account pay for:

- Parking at your place of employment, or
- Parking at a location from which you commute to work

Note: You don't qualify for the Parking Reimbursement Account if you park at a state-owned lot or garage, and you pay the parking expense through payroll deductions.

Select a parking option:

- **State-owned lot:** Parking costs are deducted pretax from your paycheck by the State.
- **Non-state-owned lot:** Set aside a chosen amount into a pretax parking reimbursement account.

Important! You can only choose one option!

If you park at a state-owned lot or garage, and you pay the parking expense through payroll deductions, you aren't eligible for the Parking Reimbursement Account.



Commuter Benefit Accounts

Two types: Parking and Transit

Transit/Vanpool Reimbursement Account:

- Set aside a pretax amount for commuting expenses via a transit reimbursement account
- Bus, rail, ferry, vanpool expenses that you incur commuting to and from work
- Bicycles are NOT included



Parking Reimbursement Account

\$315 maximum per month*

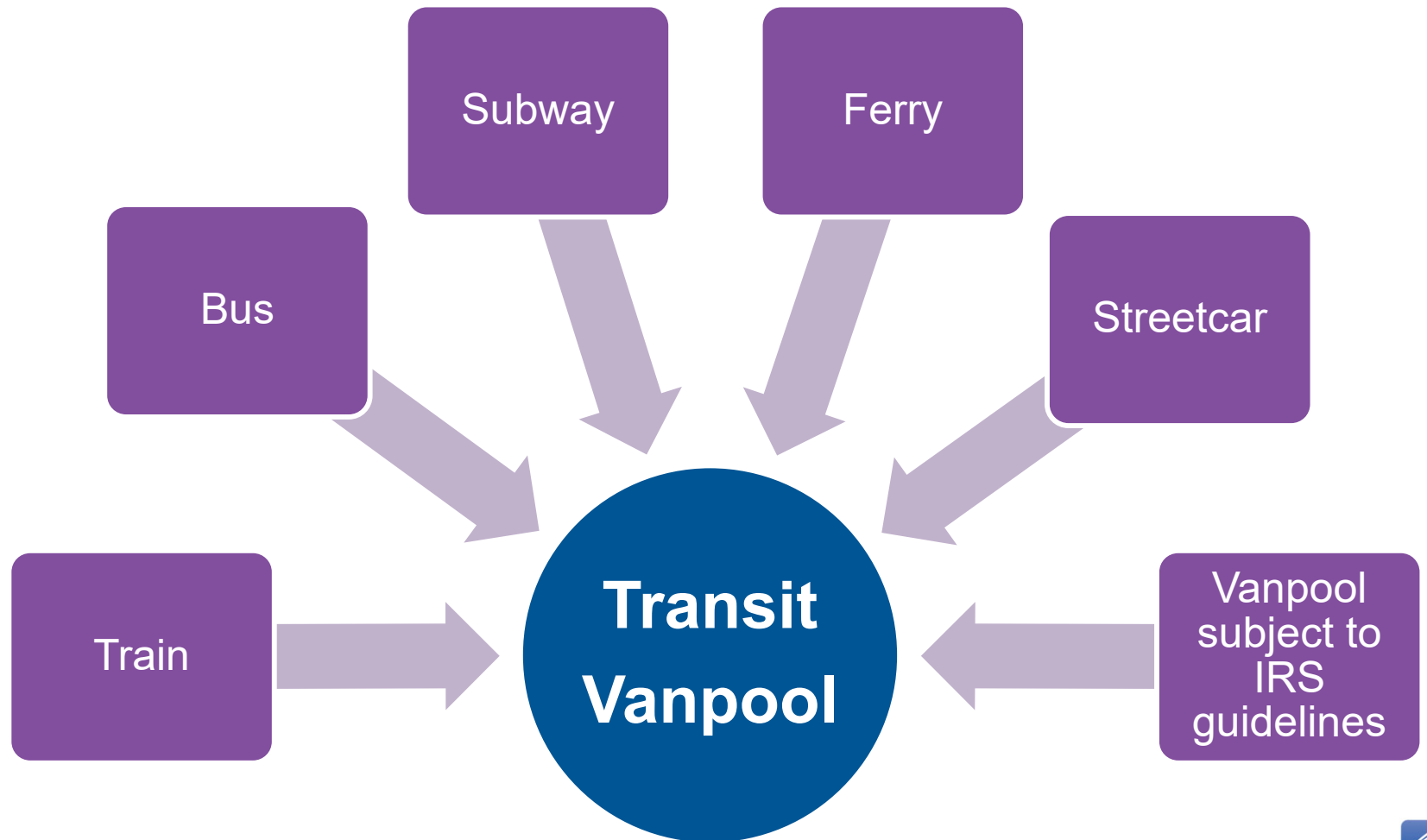


* Limits are set annually by IRS regulations.



Transit/Vanpool Reimbursement Account

\$315 per month*



* Limits are set annually by IRS regulations.



Commuter Benefit Accounts

Ineligible Expenses

- Non-work-related parking or transit costs
- Parking at a state-owned lot already deducted pretax
- Bicycle or repairs
- Rideshare (Uber, Lyft)
- Gas, fuel, or vehicle repairs





Commuter Benefit Accounts

IRS requires proof with claims

The IRS requires you to:

- **Certify** that expenses are eligible and not reimbursed elsewhere.
- **Provide third-party documentation**, or explain if unavailable (e.g., metered street parking).
- **Submit claim form:** Required for manual submissions (mail/fax), but not for online or debit card claims.



Commuter Benefit Accounts

Important dates

Claims deadline:

- ASIFlex must **receive your claims** by **March 31** for expenses incurred the previous year.

Inactive accounts:

- Accounts with no activity for 180 days are terminated, and balances are forfeited.



ASIFlex Customer Service



Contact ASIFlex for account details and claims questions.

Web: www.asiflex.com/ORPEBB

Email: asi@asiflex.com

Phone: 800-659-3035

Mailing address:

PO Box 6044

Columbia, MO 65205

Hours of operation:

Monday – Friday: 5 a.m. – 5 p.m. PT

Saturday: 7 a.m. to 11 a.m. PT

PEBB Member Services

Phone: 503-373-1102

Monday – Friday, 8 a.m. – 5 p.m.

Email: pebb.benefits@odhsoha.oregon.gov

Fax: 503-373-1654

Enroll: PEBBenroll.com

PEBB Forms:

<https://www.oregon.gov/OHA/PEBB/Pages/forms.aspx>

Plan Info: PEBBinfo.com

Language services are available. Email to set an appointment.