

**JEFFERSON UNION HIGH SCHOOL DISTRICT
ADMINISTRATIVE OFFICES**

DATE: September 16, 2021

TO: All Regular Employees (Working 50% or More)

FROM: Michelle Sherwin, Certificated Payroll Specialist
Mike Brust, Classified Payroll Specialist

RE: Enrollment in Jefferson Union High School District “Flexible Spending Account” Administered by PayFlex Systems USA, Inc.

Plan Year:

Current Employees: January 1, 2021 to December 31, 2021

New Employees: First of the Month Following Date of Hire thru December 31, 2021

Open Enrollment: Even if you participated in the health or dependent care reimbursement account during the 2021 plan year, you must complete a new enrollment form for the 2022 plan year.

Eligibility: Any employee shall be eligible as of their date of employment (or the effective date of the Plan, if later, and

- Certificated Day School unit members working at least 15 hours per week
- Certificated Adult School unit members working at least 12 hours per week
- Management, Confidential, Cafeteria, BISS and OSS unit members working at least 18.75 hours per week

Current Employees: Enrollment Forms must be received in the Payroll Department by **December 20, 2021** for an effective date of **January 1, 2022**. Be sure to make a copy of the enrollment form for your records and make copies of the claim form for future claims.

New Employees: Enrollment Forms must be received **within 30 days of your hire date**. Although you may include claims beginning on the first of the month following your date of hire, depending on when your enrollment form is processed, deductions from your paycheck will begin on the first or second full month following your date of hire. Be sure to make a copy of the enrollment form for your records and make copies of the claim form for future claims.

A Flexible Spending Account allows you to pay for transit spending account, child or elder care expenses, group insurance premiums, and your family's out-of-pocket health care expenses not covered by insurance with before-tax earnings. The obvious benefit to you is that by redirecting these expenses to a before-tax arrangement, you pay less tax and will have more spendable income

with the Flexible Spending Account.

You may deduct up to \$5,000 of untaxed salary (per calendar year per household) to pay for child or elder care expenses under the Dependent Care Reimbursement Account. The amount which you may consider in calculating the tax credit under the Federal Tax Credit is reduced, dollar-for-dollar, by any amount that you place into the Dependent Care Account.

For the Health Care Reimbursement Account, you may deduct up to **\$2,750.00** per plan year. ***You have 90 days from the end of the plan year to submit claims incurred during the plan year. Any monies left at the end of the plan year will be forfeited.***

Note: Effective January 1, 2011 distribution for over-the-counter medicines will only qualify if it is a prescribed drug or insulin.

Should you have any questions, please contact:

Certificated Staff:	Michele Sherwin, Ext. 7967	msherwin@jeffersonunion.net
Classified Staff:	Mike Brust, Ext. 7966	mbrust@jeffersonunion.net

If you have any questions about the Plan or want to discuss a confidential matter concerning your participation or the type of expenses eligible for reimbursement, please feel free to contact American Fidelity-Troy Pittock at 650-906-8675 or email: Troy.Pittock@americanfidelity.com

Employee Contributions to Medical Insurance:

Any premium contributions that you make towards district benefit plans are taken **pretax** from your paycheck which reduces your taxable income. Participation in the Flexible Benefit Plan also reduces Social Security taxes and may affect your Social Security benefits. If you do not want this **pretax** benefit, you must complete the appropriate waiver by July 1 or when eligible for coverage. Waiver forms are available in the payroll department.