

# FLEXIBLE SPENDING ACCOUNT (FSA) EXPENSES & CONTRIBUTIONS WORKSHEET

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## HEALTHCARE FSA WORKSHEET

To help you determine how much to contribute to your Healthcare FSA, use the worksheet below to enter estimated annual expenses.

You should consider this when estimating your expenses and FSA contributions since Healthcare FSAs are subject to the “use-it-or-lose-it” rule unless your employer has elected an optional rollover of up to \$550. Unused funds may be forfeited at the end of the plan year.

Under healthcare reform, a Healthcare FSA annual contribution maximum of \$2,750 will be imposed for 2021.

ITEMS TO CALCULATE	ESTIMATED PLAN YEAR AMOUNT
COMPANY HEALTH PLAN DEDUCTIBLE FOR YOU AND YOUR FAMILY	\$
MEDICAL COINSURANCE (AMOUNT YOU PAY AFTER DEDUCTIBLE IS MET)	\$
DENTAL ANNUAL DEDUCTIBLES AND COINSURANCE	\$
MEDICAL PLAN COPAYMENTS (OFFICE VISITS)	\$
PRESCRIPTION MEDICATION COPAYMENTS	\$
OVER-THE-COUNTER MEDICATION PURCHASED TO TREAT AN ILLNESS OR DISEASE	\$
ANNUAL PHYSICAL EXAMS	\$
VISION CARE EXPENSES (EXAMS/GLASSES/CONTACTS/CONTACT LENS SOLUTION)	\$
OTHER ELIGIBLE HEALTHCARE EXPENSES	\$
VACCINATIONS AND IMMUNIZATIONS	\$
CHIROPRACTIC SERVICES	\$
ACUPUNCTURE SERVICES	\$
QUALIFIED LEARNING DISABILITY TREATMENT AND/OR SPECIAL EDUCATION AND TRAINING FOR PHYSICALLY OR MENTALLY HANDICAPPED DEPENDENT(S)	\$
MENTAL HEALTH SERVICES	\$
OTHER	\$
<b>TOTAL ESTIMATED HEALTHCARE EXPENSES</b>	<b>\$</b>