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|--|---|-----------------------|---------------------------------|----------------------------|-----------------------|--------------------------------------|----------------------------|---------------|----------|---|----------|------------------------------|----------|---|----------|------------------|----------|-------|----------|--|----------|--|
| Instructions | <p>This worksheet is for estimating annual healthcare expenses only. To enroll, please complete a Flexible Spending Account Election Form.</p> <ol style="list-style-type: none"> 1. Enter your annual cost for each healthcare option you use 2. Add up the total annual healthcare expense 3. Determine your yearly number of pay periods 4. Divide the total annual expense by the number of pay periods to calculate the amount needed to be withheld every pay period. Note: Annual election amount must not exceed \$2,500/year as per IRS regulations. | | | | | | | | | | | | | | | | | | | | | |
| Medical Care | <table border="1"> <tr><td>Insurance Deductibles</td><td>\$ _____</td></tr> <tr><td>Co-pays</td><td>\$ _____</td></tr> <tr><td>Routine Exams</td><td>\$ _____</td></tr> <tr><td>Prescriptions</td><td>\$ _____</td></tr> <tr><td>Lab Expenses</td><td>\$ _____</td></tr> <tr><td>Medical Equipment</td><td>\$ _____</td></tr> <tr><td>Chiropractor Visits</td><td>\$ _____</td></tr> <tr><td>Physical Therapy</td><td>\$ _____</td></tr> <tr><td>Other</td><td>\$ _____</td></tr> <tr><td>Total Annual Medical Care Expense</td><td>\$ _____</td></tr> </table> | Insurance Deductibles | \$ _____ | Co-pays | \$ _____ | Routine Exams | \$ _____ | Prescriptions | \$ _____ | Lab Expenses | \$ _____ | Medical Equipment | \$ _____ | Chiropractor Visits | \$ _____ | Physical Therapy | \$ _____ | Other | \$ _____ | Total Annual Medical Care Expense | \$ _____ | |
| Insurance Deductibles | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Co-pays | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Routine Exams | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Prescriptions | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Lab Expenses | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Medical Equipment | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Chiropractor Visits | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Physical Therapy | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Other | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Total Annual Medical Care Expense | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Vision Care | <table border="1"> <tr><td>Eye Exam</td><td>\$ _____</td></tr> <tr><td>Glasses</td><td>\$ _____</td></tr> <tr><td>Prescription Sun Glasses</td><td>\$ _____</td></tr> <tr><td>Contacts</td><td>\$ _____</td></tr> <tr><td>Contact Lens Solutions</td><td>\$ _____</td></tr> <tr><td>Insurance Deductibles/Co-pay</td><td>\$ _____</td></tr> <tr><td>Total Annual Vision Care Expense</td><td>\$ _____</td></tr> </table> | Eye Exam | \$ _____ | Glasses | \$ _____ | Prescription Sun Glasses | \$ _____ | Contacts | \$ _____ | Contact Lens Solutions | \$ _____ | Insurance Deductibles/Co-pay | \$ _____ | Total Annual Vision Care Expense | \$ _____ | | | | | | | |
| Eye Exam | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Glasses | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Prescription Sun Glasses | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Contacts | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Contact Lens Solutions | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Insurance Deductibles/Co-pay | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Total Annual Vision Care Expense | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Dental Care | <table border="1"> <tr><td>Cleanings</td><td>\$ _____</td></tr> <tr><td>X-Rays</td><td>\$ _____</td></tr> <tr><td>Crowns</td><td>\$ _____</td></tr> <tr><td>Other</td><td>\$ _____</td></tr> <tr><td>Total Annual Dental Care Expense</td><td>\$ _____</td></tr> </table> | Cleanings | \$ _____ | X-Rays | \$ _____ | Crowns | \$ _____ | Other | \$ _____ | Total Annual Dental Care Expense | \$ _____ | | | | | | | | | | | |
| Cleanings | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| X-Rays | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Crowns | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Other | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Total Annual Dental Care Expense | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Orthodontia Care | <table border="1"> <tr><td>Orthodontia</td><td>\$ _____</td></tr> <tr><td>Retainers</td><td>\$ _____</td></tr> <tr><td>Total Annual Orthodontia Care</td><td>\$ _____</td></tr> </table> | Orthodontia | \$ _____ | Retainers | \$ _____ | Total Annual Orthodontia Care | \$ _____ | | | | | | | | | | | | | | | |
| Orthodontia | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Retainers | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| Total Annual Orthodontia Care | \$ _____ | | | | | | | | | | | | | | | | | | | | | |
| TOTALS | <table border="1"> <tr> <td>Total Annual Healthcare Expense</td> <td>÷</td> <td>Number of Pay Periods</td> <td>=</td> <td>Total Pay Period Deduction</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td>\$ _____</td> </tr> </table> | | Total Annual Healthcare Expense | ÷ | Number of Pay Periods | = | Total Pay Period Deduction | | | | | \$ _____ | | | | | | | | | | |
| Total Annual Healthcare Expense | ÷ | Number of Pay Periods | = | Total Pay Period Deduction | | | | | | | | | | | | | | | | | | |
| | | | | \$ _____ | | | | | | | | | | | | | | | | | | |