



Health FSA Worksheet

Keep these things in mind:

- Use the money in this account to pay for the diagnosis, cure, prevention or treatment of a disease.
- Expenses cannot be reimbursed by insurance or any other source.
- Be conservative. If you don't use the money in your account within the plan year, you lose it.
- You cannot change, midyear, the amount you set aside unless there is an IRS-approved status change event.
- For a Limited Health FSA, record only expenses for vision, dental and preventive care. (You can use your HSA for other eligible medical expenses, if offered by employer and stated in your SPD.)

Insurance deductibles	\$ _____
Co-pays/coinsurance	\$ _____
Exams	\$ _____
Prescription drugs	\$ _____
Diabetic supplies	\$ _____
Chiropractic	\$ _____
*Over-the-counter medicines	\$ _____
Hearing exams	\$ _____
Hearing aid	\$ _____
Hearing aid battery	\$ _____
Dental fillings, bridges, crowns	\$ _____
Dentures	\$ _____
Orthodontia	\$ _____
Vision exams	\$ _____
Glasses (lenses and frames)	\$ _____
Contact lenses	\$ _____
Contact lens solution	\$ _____
Corrective eye surgery	\$ _____

Total: Amount to set aside \$ _____
Divide by # of paychecks/year \$ _____



Dependent Care Account Worksheet

Keep these things in mind:

- \$5,000 annual maximum per household.
- Record expenses for dependent children under age 13 who you claim on your taxes, or a disabled spouse or dependent of any age.
- To qualify, you and your spouse must be employed, or your spouse must be a full-time student or looking for work.
- Be conservative. If you don't use the money in your account within the plan year, you lose it.
- Once the plan year has started, you cannot change your election unless there is an IRS-approved status change event.

January	\$ _____
February	\$ _____
March	\$ _____
April	\$ _____
May	\$ _____
June	\$ _____
July	\$ _____
August	\$ _____
September	\$ _____
October	\$ _____
November	\$ _____
December	\$ _____

Total: Amount to set aside \$ _____
Divide by # of paychecks/year \$ _____

***A few of you use your FSA to purchase over-the-counter (OTC) medications...**

As a result of Health Care Reform, the IRS will require a prescription for OTC medication to be eligible for reimbursement. This change is for medicine purchased on January 1, 2011 or later. Go to www.DiscoveryBenefits.com for other reform updates.