

Healthcare Reimbursement Account (HFSA) Worksheet/Election Calculator

 **Examples of Eligible Expenses**

- | | | |
|--|---|--|
| Acupuncture
Birth control
Birth prevention surgery
Braille books & magazines
Chiropractic
Co-insurance
Co-payments
Contact lenses & solutions
Deductibles
Dental expenses
- Cleanings - Crowns
- Cavities - Root Canals | Dentures
Diagnostic fees
Drug addiction treatment
Durable medical equipment
Eye examination
Eye Glasses
Guide dog care
Handicapped person's care
Hearing aids & batteries
Infertility treatment
Insulin & diabetic supplies
Lab work / Diagnostic fees | Laser eye surgery
Learning disabilities care
Massage (Doctor Prescribed)
Obstetrical expenses
Orthodontia
Over the counter expenses
Oxygen equipment
Physical examinations
Prescription medications
Psychiatric care
Smoking cessation programs
Sterilization |
|--|---|--|

(Taken from the IRS Section 213(d) List which outlines all eligible expenses)

 **How Do You Determine Your Expenses?**

You can use this worksheet to estimate how much you will need to put into your HFSA. Please remember to be conservative, but don't forget that this account covers you and your dependents.

<u>Health Care Expenses</u>	<u>You</u>	<u>Your Spouse</u>	<u>Your Children</u>
Deductibles:			
Medical	\$ _____	\$ _____	\$ _____
Dental	\$ _____	\$ _____	\$ _____
Vision	\$ _____	\$ _____	\$ _____
Co-pays:			
Medical	\$ _____	\$ _____	\$ _____
Dental	\$ _____	\$ _____	\$ _____
Dental Care	\$ _____	\$ _____	\$ _____
Prescriptions	\$ _____	\$ _____	\$ _____
Vision Care:			
Eye Exams	\$ _____	\$ _____	\$ _____
Glasses	\$ _____	\$ _____	\$ _____
Contacts	\$ _____	\$ _____	\$ _____
Chiropractic	\$ _____	\$ _____	\$ _____
Other	\$ _____	\$ _____	\$ _____
Total Estimated Expenses	(A.) \$ _____	(B.) \$ _____	(C.) \$ _____

(Total Annual Election) (D.) \$ _____ (Add total of lines A, B and C above)

Number of Pay Periods	Divide Line D. Above By
In Plan Year (E.) _____	Line E. (This is your deduction per payroll) \$ _____

 **QUESTIONS?...** Please don't hesitate to contact HR Concepts!



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