



THE EPISCOPAL DIOCESE OF MISSOURI

DATE: October 15, 2021

TO: Clergy and Lay Employees of the Congregations
in the Diocese of Missouri

FROM: Desirée Brattin
Canon for Finance & Administration

RE: Flexible Spending Account

It is that time of year where you are presented with a great opportunity regarding your benefits. The Flexible Spending Account (FSA) enrollment for our employees is now upon us. This is a *free* benefit that allows you to pay for out-of-pocket medical and dependent care expenses pre-tax. Expenses for you, your spouse and dependents can run through the program, saving you approximately 30 cents on the dollar.

For those of you that currently have a Health Savings Account (HSA) plan, you have the option of enrolling in a Limited FSA. Limited FSA's can be used for qualified dental, vision and preventive expenses.

Paylocity (formerly BeneFlex) will continue to administer our plan for 2022.

Eligibility and Enrollment

All full-time (20 hours or more per week) clergy and lay employees are eligible to participate in this program. **Employees who want to participate must have their enrollment form in to the Offices of the Bishop no later than November 12, 2021**, for the plan year January 1 through December 31, 2022. If we miss this date, it can delay the set up of the plan and delivery of FSA cards if you are new to the plan. Remember, if you are already in the plan; keep your Benny card as it is used year after year until it expires.

Resources

The following resources are attached to assist in your decision making:

- **FSA Enrollment Form** – Comprehensive Brochure Introducing FSA Benefits and Enrollment form
- **Medical Flexible Spending Account Eligible** – Comprehensive Listing of Medical FSA Eligible Expenses
- **Dependent Care Flexible Spending Account Eligible** – Comprehensive Listing of Dependent Care FSA Eligible Expenses
- **Limited Purpose Flexible Spending Account Eligible** – Comprehensive Listing of the Limited Purpose FSA Eligible Expenses

Enrollment Form

Please follow these very important instructions as you complete your enrollment form. The Effective Date in the plan is January 1, 2022. The Company for this purpose is the Episcopal Diocese of Missouri. The Department/Division is your employing church. Please do not forget to sign and date at the bottom of the form. Please return your form to Rita Benson via e-mail at rbenson@diocesemo.org or to:

Rita Benson
Episcopal Diocese of Missouri
1210 Locust Street
St. Louis, MO 63103

We hope you will take advantage of this tax savings opportunity. The maximum election for medical is \$2,750 and \$5,000 for dependent care. Our plan includes the \$550 carryover. The \$550 carryover allows you to rollover up to \$550 of unused medical/limited FSA funds at the end of the plan year. The carryover does not apply to the dependent care FSA.

If you have questions, please feel free to contact me or Rita Benson at 314-231-1220.