

EMPLOYEE REIMBURSEMENT ACCOUNT ANNUAL EXPENSE ESTIMATE WORKSHEET

This worksheet is intended to assist you with the enrollment process by helping you calculate your applicable expenses and determine which Employee Reimbursement Account (ERA) offerings are right for you. Enter your expenses below and determine the appropriate amount(s) to contribute to your ERA Account(s).

Medical/Dental/Vision Reimbursement Account

Annual medical expenses, such as:

Deductibles and co-pays \$ _____
 Physician visits \$ _____
 Prescriptions \$ _____
 Other: _____ \$ _____

Annual dental expenses, such as:

Deductibles and co-pays \$ _____
 Routine check-ups \$ _____
 Orthodontia \$ _____
 Other: _____ \$ _____

Annual vision expenses, such as:

Exams \$ _____
 Eyeglasses \$ _____
 Contact lenses, solutions, cleaners \$ _____
 Other: _____ \$ _____

Total Estimated Medical/Dental/Vision Expenses: \$ _____ ÷ _____ = \$ _____
Annual Amount (Cannot exceed \$2,550 IRS maximum) # of Pay Periods** Per Pay Period

Dependent Day Care Reimbursement Account

Annual dependent day care expenses, such as:

Payment to dependent care facility or individual \$ _____
 Payment to other care providers \$ _____
 Other: _____ \$ _____

Total Estimated Dependent Day Care Expenses: \$ _____ ÷ _____ = \$ _____
Annual Amount (Cannot exceed \$5,000 IRS maximum) # of Pay Periods** Per Pay Period

Parking & Transit Reimbursement Accounts

Annual parking and/or transit expenses, such as:

Parking fees for lots and/or ramps \$ _____
 Bus/train passes or vouchers \$ _____
 Vanpooling fees \$ _____
 Other: _____ \$ _____

Total Estimated Parking/Transit Expenses: \$ _____ ÷ _____ = \$ _____
Annual Amount* # of Pay Periods** Per Pay Period

*Cannot exceed IRS maximum \$255/month (\$3,060/year) for parking and \$130/month (\$1,560/year) for transit.

Total Per-Pay-Period Reduction

Add the total estimated medical/dental/vision expenses and the total dependent day care estimate.

\$ _____
Per Pay Period

**Weekly, 52 pay periods | Biweekly, 26 pay periods | Semimonthly, 24 pay periods | Monthly, 12 pay periods



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