

Letter 10 with Response

From: [Ernzen, Savannah - DNR](#)
To: [ETF SMB Board Feedback](#)
Subject: Refund on Transit Flexible Spending Accounts
Date: Thursday, October 22, 2020 11:11:39 AM

Hi there,

Is there an effort underway, or could there be, to work with Connect Your Care to allow employees to get their Transit Flexible Spending Account money refunded? Many staff are no longer allowed to work in their office because of COVID, so there is no use for bus passes. In my situation, for example, I have put nearly \$500 in my account that I no longer have any need for.

I called Connect Your Care and they said they currently do not do refunds. Hoping the State can work with them to change this.

Please let me know if there is a Board meeting coming up where I can speak on this topic.

Thank you,

Savannah Ernzen

We are committed to service excellence.

Visit our survey at <http://dnr.wi.gov/customersurvey> to evaluate how I did.

Savannah Ernzen

Property Planner – Bureau of Facilities and Lands

Internal Services Division

Wisconsin Department of Natural Resources



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From: [ETF SMB Board Feedback](#)
To: [Ernzen, Savannah - DNR](#); [ETF SMB Board Feedback](#)
Cc: [Stamm, Brian - ETF](#); [Mallow, Eileen K - ETF](#); [Vang, Xiong - ETF](#)
Subject: RE: Refund on Transit Flexible Spending Accounts
Date: Wednesday, November 11, 2020 8:16:00 AM

Dear Ms. Ernzen:

Thank you for reaching out to the Department of Employee Trust Funds (ETF) regarding your concerns of the possibility of a refund for your transit flexible spending account money. I'm sorry to learn about your situation and regret to say that there is not a refund option at this time due to Internal Revenue Service (IRS) Regulations. I'm including some information below as to why. If after your review, you find that you still have questions, please feel free to reach out to my staff noted below.

Currently, under the Transit Account, participants are not eligible to receive a distribution of funds in any form unless the claims are submitted for eligible transit expenses such as bus passes, car service apps (uberPOOL and Lyft Line), and train/subways used for the purpose of work-related commute. A list of transit eligible expenses can be found at <https://www.connectyourcare.com/tools/commuter-benefits-eligible-expenses/>.

Additionally, IRS does not allow for the return of Transit Account contributions if the balance is not used in full by the end of each plan year. However, any remaining balance in the Transit Account at the end of the 2020 plan year is eligible for carryover onto the 2021 plan year and made available for use on April 15, 2021 with ConnectYourCare (CYC). Your carryover balance of \$500 can be used to pay for transit expenses in 2021 as long as you remain an active State employee. If you terminate from State services, your Transit Account will be terminated, and you will not be able to incur transit expenses.

While we do not have open forums at the Board meetings, a copy of your message will be included in the meeting materials for the November 18, 2020 Group Insurance Board meeting. Board members will have a chance to review your request and consider it for potential future changes.

Thank you, again, for contacting ETF. We appreciate the feedback that we receive from members of the Group Health Insurance Program and consider the feedback when we negotiate with vendors for future benefits. Unfortunately, IRS does not allow ETF or CYC to refund remaining contributions with the Transit Account. I hope this helps to answer your question, but if you have additional questions please do not hesitate to reach out to me for further clarification via email Xiong2.Vang@etf.wi.gov or via phone at (608) 266-5875.

Sincerely,

Xiong Vang, HSA and ERA Accounts Program Manager
Department of Employee Trust Funds

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