



How to Enroll and Manage Pre-tax Savings Accounts

For State Employees

Pre-Tax Savings Accounts for State Employees



When to Enroll or Change Coverage*



Within 30 days of date of hire



Annual open enrollment period in the fall



Qualifying life event

You cannot cancel your benefit election(s) mid-year without a qualifying life event

*Parking and Transit Accounts enroll or change anytime during plan year

Employee Enrollment Options

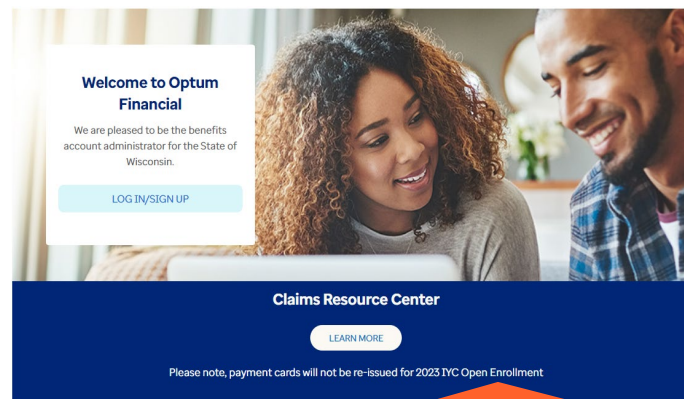
Check with your benefits specialist about how to enroll:

User ID:

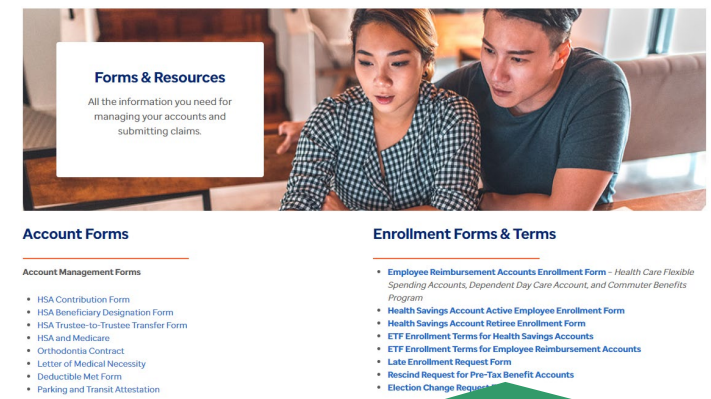
Password:

[Sign In](#)

Payroll Center e-Benefit



Optum Financial e-Enrollment



Paper

Retiree HSA Enrollment Requirements

Currently Enrolled

2 options:

1. Enroll online via Optum Financial portal
2. Complete the [HSA Enrollment Form – Retirees Only](#)



HSA enrollment is required each year!

New Enrollment

- Complete the [HSA Enrollment Form – Retirees Only](#)



Age 65+

- Not eligible



Following Enrollment

Welcome Brochure

- How to set-up and manage account
- Responsibilities
- Key dates

Payment Card

- No card for Dependent Day Care Account, Parking Account, or Transit Account

Account Information



Minimum \$50 Balance Requirement



Applies to

- Health Care Flexible Spending Account (FSA)
- Limited Purpose Flexible Spending Account (LPFSA)
- Parking Account
- Transit Account

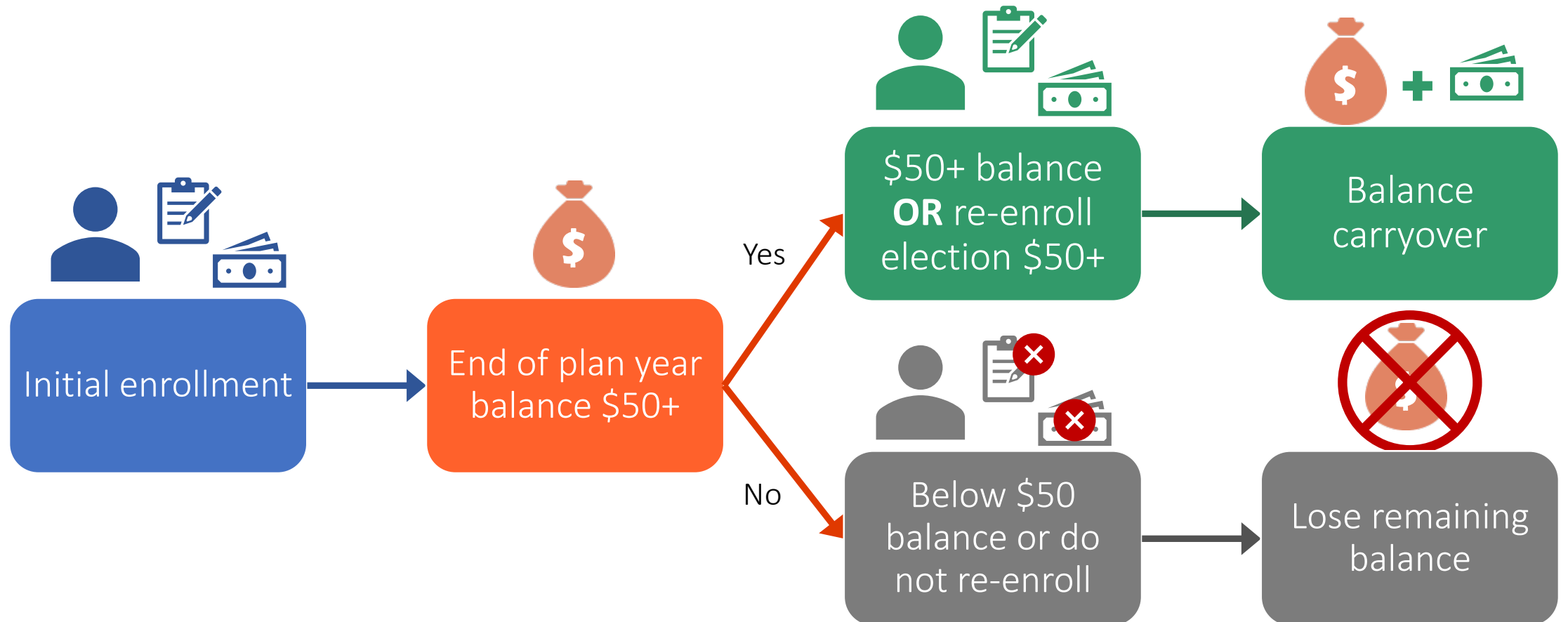
Required each plan year

- \$50 election **OR** \$50 balance to carry over
- Carryover cannot exceed annual limit, if applicable



Keep track of your account balance!

How the \$50 Minimum Carryover Works





Submitting a Claim

Payment card:

- Claims automatically created
- Save documentation in case it is required
- If receipt is needed, notified within 10 days of payment card transaction



Submit claim options:

- Online or on the mobile app
- Use claim forms at myoptumfinancial.com/etf



Limitations

- Eligible expenses must be incurred during the plan year
- Submit claims by the end of the plan year
- Provide claim documentation by the end of the 90-day run-out period



Questions About Pre-Tax Savings Accounts?

Optum Financial[®]

Available 24/7 for
program-specific questions:

- myoptumfinancial.com/etf
- 1-833-881-8158

Active state employees



- Contact your benefits specialist for questions about:
 - Eligibility
 - Paycheck deductions

Resources

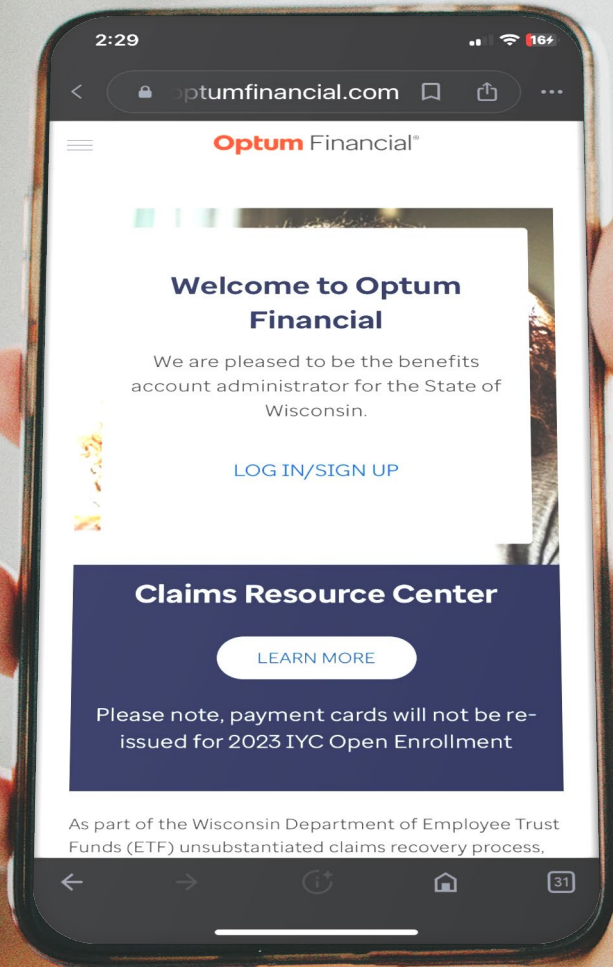
- Optum Website
- Benefits Available to Me



Optum Website

Access and manage your
pre-tax savings accounts at:

myoptumfinancial.com/etf



Benefits Available to Me

Find benefits available
by employer

etf.wi.gov/benefits-by-employer





Stay Connected



etf.wi.gov



ETF E-mail Updates



1-877-533-5020

