



# 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

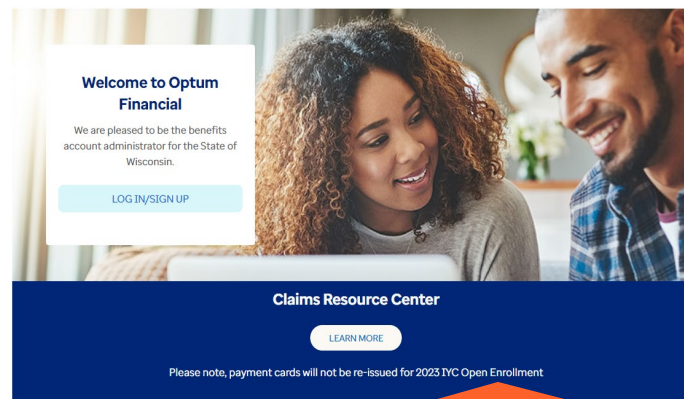
Check with your benefits specialist about how to enroll:

User ID:

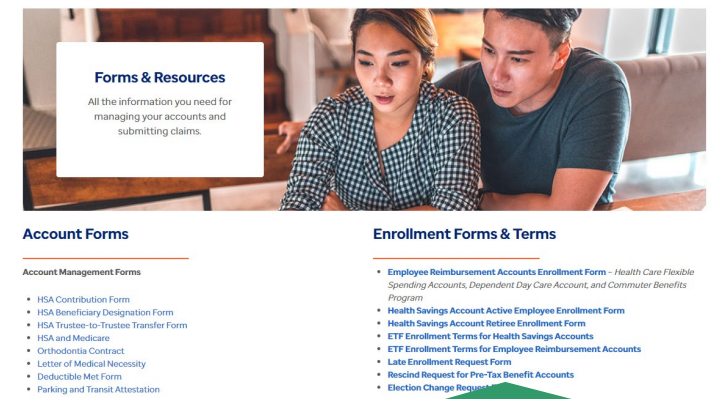
Password:

[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

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## 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

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# Minimum \$50 Balance Requirement



## Applies to

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

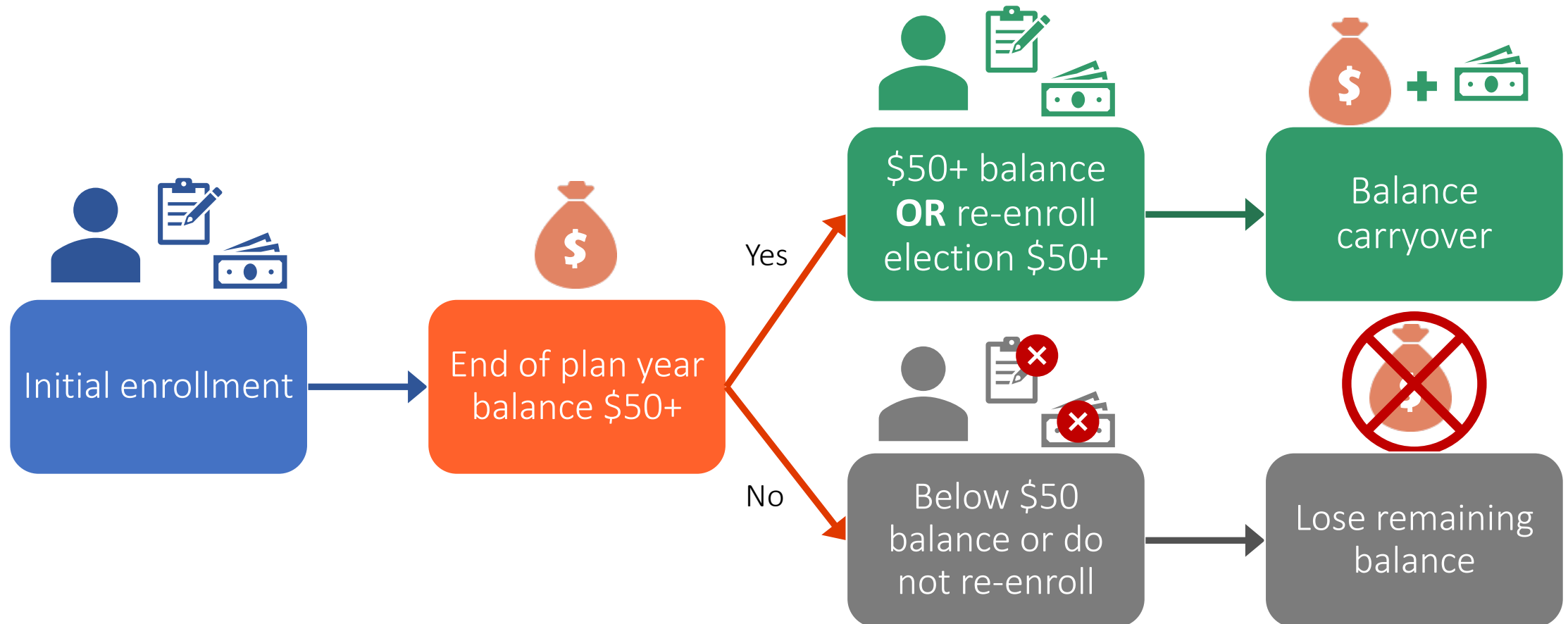
## Required each plan year

- \$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](https://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](https://myoptumfinancial.com/etf)
- 1-833-881-8158

Active state employees



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

# Resources

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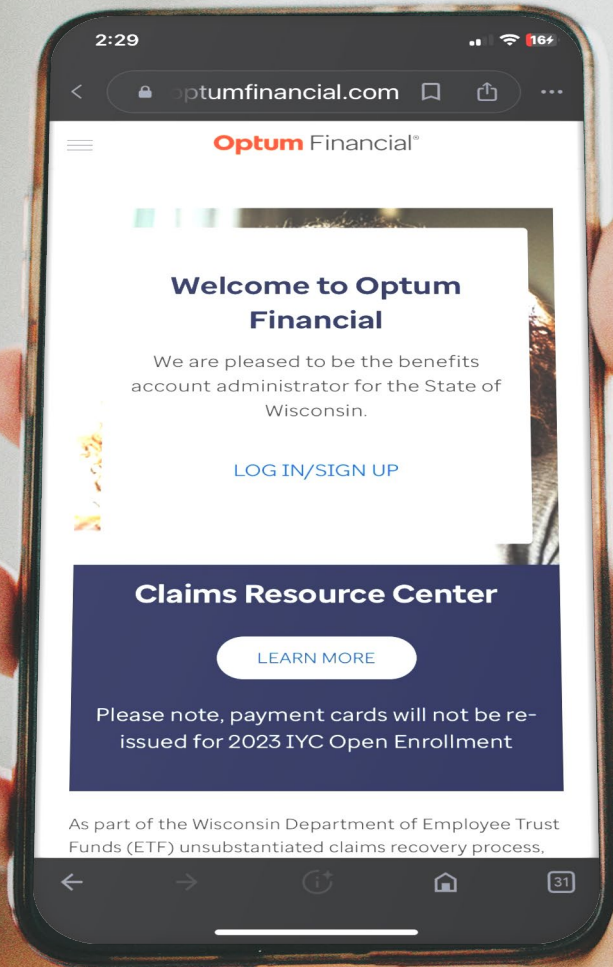
- Optum Website
- Benefits Available to Me



# Optum Website

Access and manage your  
pre-tax savings accounts at:

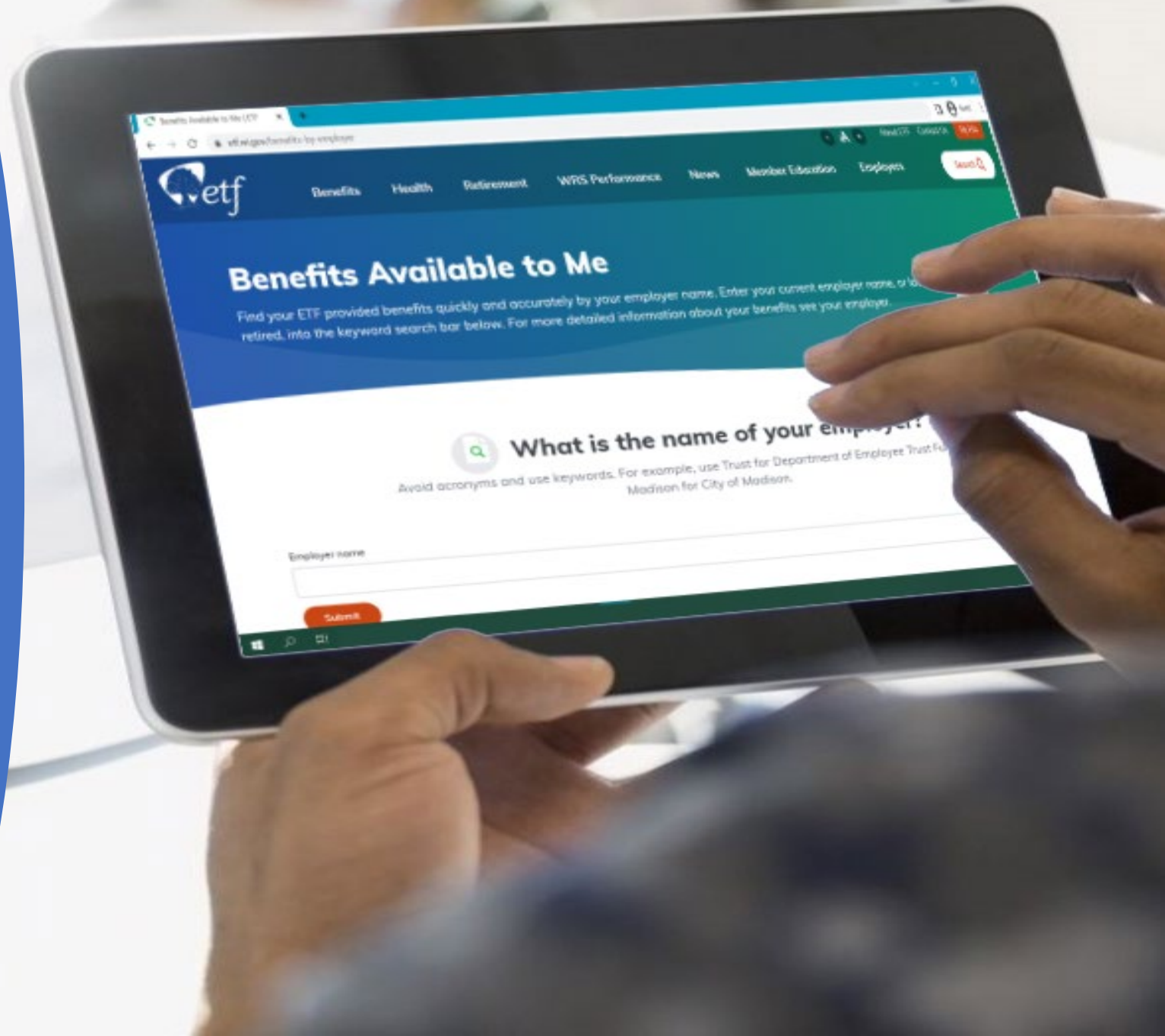
[myoptumfinancial.com/etf](https://myoptumfinancial.com/etf)



# Benefits Available to Me

Find benefits available  
by employer

[etf.wi.gov/benefits-by-employer](http://etf.wi.gov/benefits-by-employer)





# Stay Connected

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[etf.wi.gov](http://etf.wi.gov)



ETF E-mail Updates



1-877-533-5020

