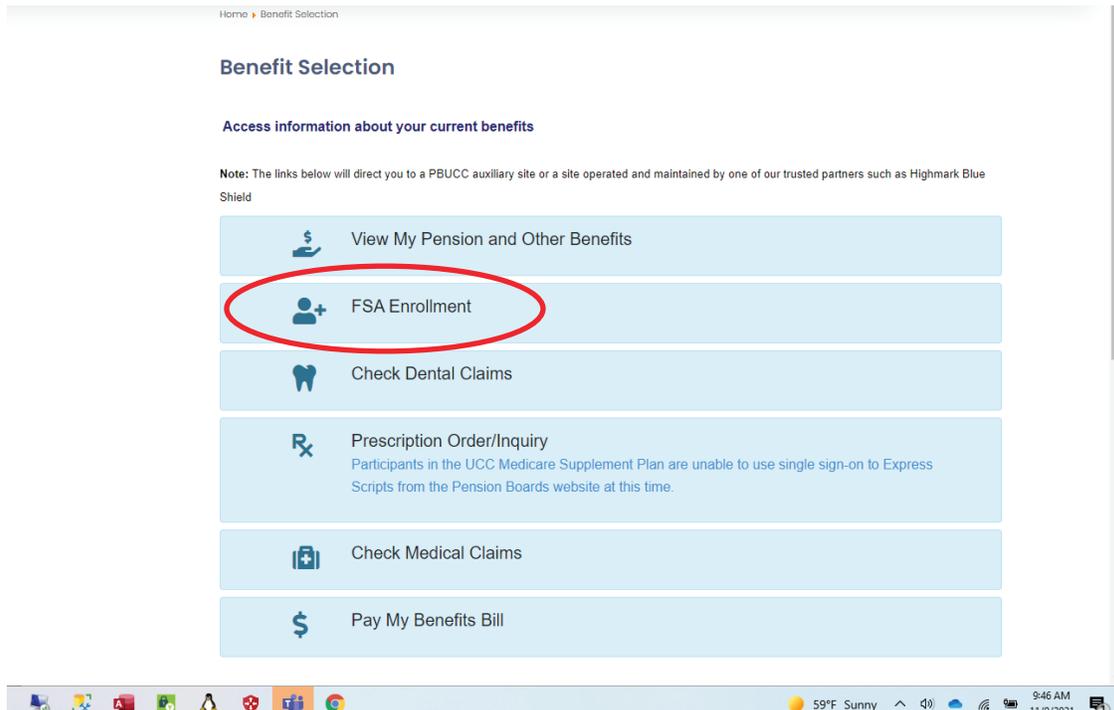




# FSA Online Enrollment Guide

## Member workflow

1. Visit the Pension Boards website and log in <https://www.pbucc.org>. Once logged in you will be redirected to the Benefits Selection page. Click on the **FSA Enrollment** link



2. The online FSA Enrollment form will load. Fill in your FSA elections and submit the form

The screenshot shows the 'FSA Enrollment' form. On the left, there is a navigation menu with 'Flexible Spending' and 'FSA Enrollment' highlighted. The main content area has the title 'FSA Enrollment' and a warning message: '\* FSA Enrollment is only available through your current UCC employer.' The form fields are: Member ID # (redacted), Member Name (redacted), Member Email: msharma@pbucc.org, Employer ID # (16235), Employer Name (BETHANY CONGL CHURCH UCC), Employer Email (myemployer@pbucc.org), FSA Plan Year (01/01/2022 through 12/31/2022). Below the fields, there is a statement: 'As an eligible employee in the Flexible Benefit Plan for UCC Ministries, I acknowledge that I have read the Highlights Brochure and understand the benefits available to me as well as the other rights and obligations which I have under the Plan.' There are two radio button options: 'My health coverage is through my spouse's/partner's\* UCC Health Plan. Name of spouse/partner:' (with a text input field) and 'I elect to receive medical reimbursements for the Plan Year.' (which is selected). A footnote states: '\* I can only receive reimbursement for my domestic partner's medical expenses if I claim him/her for federal income tax purposes.' At the bottom, there is a 'Salary redirection:' field.

the Administrator believes it advisable in order to satisfy certain provisions of the Internal Revenue Code.

- The reduction in my cash compensation under this agreement shall be in addition to any reductions under other agreements or benefit programs maintained by my Employer.
- The amounts that are not used during a Plan Year to provide benefits will be forfeited and may not be paid to me in cash or used to provide benefits specifically for me in a later Plan Year.
- Prior to the first day of each Plan Year, I will be offered the opportunity to change my benefit elections for the following Plan Year. If I do not complete and return a new election form at that time, I will be treated as having elected not to participate for the following Plan Year.
- **Because of the special tax treatment of the FSA, the IRS has a series of rules that must be followed. Therefore, my employer and I understand that contributions I make to the Flexible Benefit Plan for UCC Ministries must strictly be pre-tax deferrals. I also understand that my employer cannot make contributions on my behalf to my FSA and that all non-pre-tax contributions will be returned to the employer. In the event my employer makes any contributions to my account and I am audited by the IRS, the Pension Boards-UCC will not be held liable.**

THIS AGREEMENT IS SUBJECT TO THE TERMS OF THE EMPLOYER'S CAFETERIA PLAN, AS AMENDED FROM TIME TO TIME IN EFFECT, SHALL BE GOVERNED BY AND CONSTRUED IN ACCORDANCE WITH APPLICABLE LAWS , SHALL TAKE EFFECT AS A SEALED INSTRUMENT UNDER APPLICABLE LAWS, AND REVOKES ANY PRIOR ELECTION AND COMPENSATION REDUCTION AGREEMENT RELATING TO SUCH PLAN.

I accept terms & conditions.

Electronic Signature		
Employee Name:	MCKERLEY, KIMBERLY S	Date: 11/09/2021

Print

Submit

#### Flexible Spending

Flexible Benefit Plan for UCC Ministries

How to Make It Happen

Frequently Asked Questions

#### FSA Enrollment

Publications

Forms

### Preview FSA Enrollment Changes

The proposed Enrollment changes are shown below:

Member ID #	pbtest1
Member Name	pbtest1
Member Email	pscott@pbucc.org
Employer ID #	22222
Employer Name	Test, Employer
Employer Email	hr22auto@pbucc.org
FSA Plan Year	01/01/2022 through 12/31/2022
FSA Medical Care Coverage	Yes
FSA Medical Care Amount	\$2500.00
FSA Dependent Care Coverage	Yes
FSA Dependent Care Amount	\$450.00
Terms & Conditions	Accepted

Cancel to edit elections

Submit to complete elections

If you wish to make changes please click "Cancel" to go back to the previous page.

Cancel

Submit

Leave a message

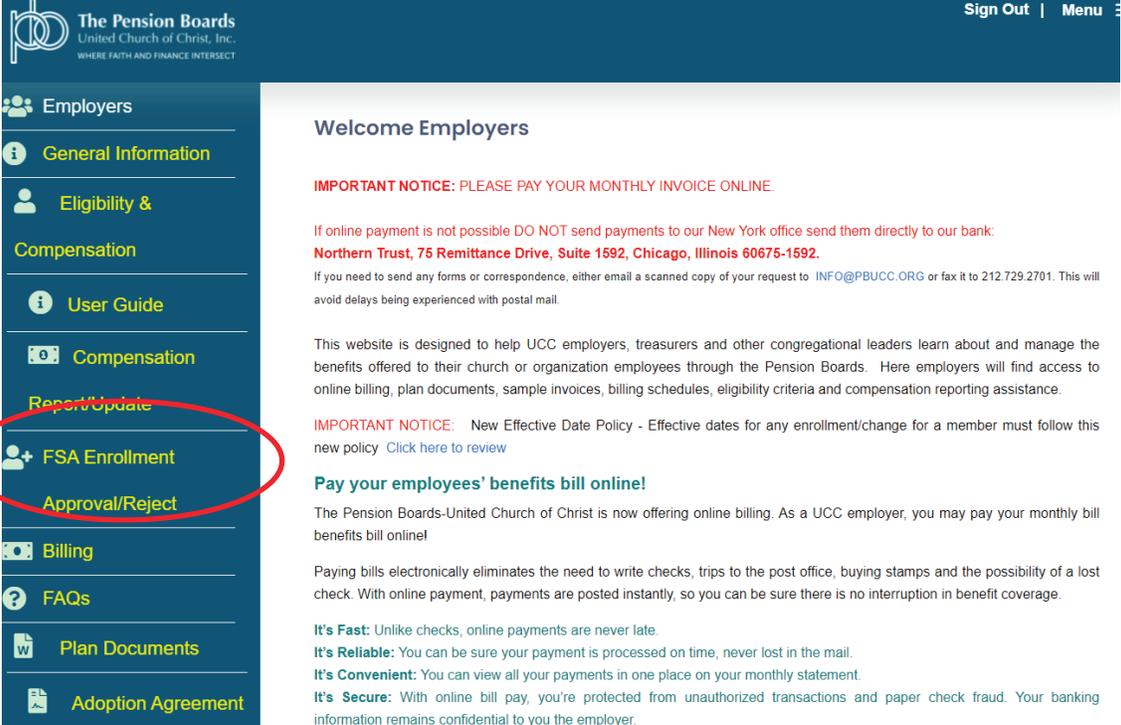
You will be able to review your selections and do a final submission

You also have the option to cancel and make changes to your selection at this point

3. Finally submit your enrollment for approval by employer.
4. Email confirmation is sent to the employee whenever they submit an enrollment form
5. Email notification is sent to the employer whenever an enrollment form is submitted by one of their employees

## Employer workflow

1. When an employer is ready to process an enrollment by one of their employees, they would navigate to <https://employers.pbucc.org> and login.
2. Click on the "FSA Enrollment" menu item



The screenshot shows the homepage of The Pension Boards website. The left sidebar contains a navigation menu with the following items: Employers, General Information, Eligibility &, Compensation, User Guide, Compensation, Report/Update, FSA Enrollment (circled in red), Approval/Reject, Billing, FAQs, Plan Documents, and Adoption Agreement. The main content area is titled "Welcome Employers" and contains several sections: an important notice about online payments, a note about online payment options, a section about the website's purpose, another important notice about the new effective date policy, and a section titled "Pay your employees' benefits bill online!" with details about online billing and its benefits.

3. The employer will be redirected to the approval page which list all the FSA applications waiting for approval.



The screenshot shows the "FSA Enrollment Approval/Reject" page. The left sidebar is the same as in the previous screenshot. The main content area displays the following information:

**Employer ID:** 22222  
**Employer Name:** test1  
**Email:** testpensionboard@gmail.com

\* Please click on view to approval or reject your employee's FSA Enrollment.

Search:

Member ID	Member Name	Enrollment Status	Action
pbtest1	pbtest1	Pending	<a href="#">View</a>

Showing 1 to 1 of 1 entries

4. Click the "View" link to see the FSA enrollment details

The screenshot shows the 'FSA Enrollment' page on the 'The Pension Boards' website. The header includes the logo and 'United Church of Christ, Inc. WHERE FAITH AND FINANCE INTERSECT'. The top right has 'Sign Out | Menu'. A left sidebar contains navigation links: Eligibility, Compensation, User Guide, Compensation, Report/Update, FSA Enrollment (with sub-link Approval/Reject), Billing, FAQs, Plan Documents, Adoption Agreement, Church Plan, and Certification. The main content area displays a table of enrollment details for member 'pbtest1'.

Member ID #	pbtest1
Member Name	pbtest1
Member Email	pscott@pbucc.org
FSA Plan Year	01/01/2022 through 12/31/2022
Spouse Coverage	No
FSA Medical Care Coverage	No
FSA Dependent Care Coverage	Yes
FSA Dependent Care Amount	\$450.00

Below the table, there is a section titled 'Please Choose Option For Approve/Reject Employee Enrollment:' with two radio button options: 'Approved' and 'Rejected'. At the bottom of this section are two buttons: 'Cancel' and 'Submit'. A green box with the text 'Choose Approve or Reject' has a line pointing to the radio button options. Another green box with the text 'Submit Approval or Rejection' has a line pointing to the 'Submit' button.

5. Choose "Approve" or "Reject" and click the submit button

6. An email notification will be sent to the employee who submitted the FSA Enrollment online.