Healthcare Flexible Spending Account Worksheet

Start by reviewing prior years' receipts for medical expenses (healthcare, dental, and vision) that you paid for out-of-pocket. This may be helpful in determining your annual Flexible Spending Account election for next year.

Budget only for expenses that are eligible for reimbursement through a medical Flexible Spending Account and that will be incurred during the next plan year.

(Be sure to include expenses for you, your spouse, and other eligible dependents.)

Review list of eligible expenses for more information on whether a specific expense may be reimbursed.

Type of Service	Number of Visits per Year	Cost per Visit	Mileage Cost per Visit $= Average\ miles\ per\ Visit^*$ X $Mileage\ Rate\ (\$0.17/mile)$	Annual Cost $= Number\ of\ Visits$ X $(Cost\ per\ Visit + Mileage\ Cost\ per\ Visit)$
Office Visits (including Specialists)	*Example: 10 visits*	*Example: $25 copayment*	*Example: 20 miles X $0.17/mile = $3.40*	*Example: 10 X ($25 + $3.40) = $284.00*
Chiropractor Visits				
Hospitalization or Surgery				
Emergency Room Visits ($60 copayment**)				
Speech, Physical, or Occupational Therapy				
Counseling or Therapy Sessions				
		TOTAL ANNUAL MEDICAL SERVICE COST		

Type of Product	Monthly Cost	Annual Cost $= Monthly\ Cost\ X\ 12$
Prescriptions		
Over-the-counter supplies and equipment (contact lens supplies, diabetic supplies, etc.)		
	TOTAL ANNUAL MEDICAL PRODUCT COST	

Other Medical Expenses	Annual Cost
Other anticipated medical expenses (Dental expenses, Vision expenses, One-time services, One-time prescriptions, etc.)	
TOTAL ANNUAL OTHER MEDICAL EXPENSES COST	

TOTAL ANNUAL MEDICAL FLEXIBLE SPENDING ACCOUNT ELECTION $= Total\ Annual\ Medical\ Service\ Cost + Total\ Annual\ Medical\ Product\ Cost + Total\ Annual\ Other\ Medical\ Expenses\ Cost$	

* Average Miles per visit is defined as the average number of miles to and from a medical provider for one visit. This mileage is an eligible expense for reimbursement through a medical Flexible Spending Account.

** Waived if admitted as an inpatient directly from the emergency room or for observation for 24 hours or longer.