



MyHRDashboard – Setting Up and Maintaining FSAs/HSAs

1. Under “My Employees”, Select “Employee Flexible Spending Accounts”. You will then select the Employee and Plan Year. Click the underlined [Plan Year](#) link and select from the available plans based on the following:
 - If an **FSA** is offered, the plan year will be 20XX (2018, 2019, etc).
 - If an **HSA** is offered, the plan year will be HSXX (HS18, HS19, etc).

Note: Both plan types can be offered by the same employer, but the plan year codes will be unique to each plan.

HR / Change / Employee Flexible Spending Accounts

Flexible Spending Accounts

| | | |
|---------------------------|--------|----------|
| Employee | E23381 | DOE JOHN |
| Plan Year | | |

Employee Status

Override Deduction Start Date

Override Deduction Stop Date

2. Once a plan year is selected, click on [Account](#) under the Elections section. This will bring up a pop-up to choose the appropriate plan. Once a plan is chosen, it will fill in under Override Calculations, Account Balances, and Company Match sections, as applicable.

HR / Change / Employee Flexible Spending Accounts Client

Flexible Spending Accounts

| | | |
|---------------------------|--------|-----------|
| Employee | E23381 | DOE JOHN |
| Plan Year | HS18 | 2018 Year |

Employee Status **ACTIVE**

Override Deduction Start Date

Override Deduction Stop Date

Elections

| | Account | Account Desc | Plan Year Election |
|-----|-------------------------|------------------------|--------------------|
| > x | HSA | HEALTH SAVINGS ACCOUNT | |

3. Under "Elections", the amount entered under "Plan Year Election" should equal the total contribution for the rest of the plan year. My HR Dashboard will automatically divide the "Plan Year Election" amount by the number of payrolls left in the year. If an employee misses a check, the new per-check amount will be calculated and begin on their next payroll.

Flexible Spending Accounts

Employee: E23381 DOE JOHN
Plan Year: HS18 2018 Year
Employee Status: ACTIVE
Override Deduction Start Date:
Override Deduction Stop Date:

Elections

| | Account | Account Desc | Plan Year Election |
|-----|---------|------------------------|----------------------|
| > x | HSA | HEALTH SAVINGS ACCOUNT | <input type="text"/> |

4. Under "Override Calculations", if an amount is entered under "Deduction Override" or "Match Override", the calculated deduction from the "Plan Year Election" field will be overridden with the amount entered.

Note: The "Deduction Override" is the amount to be collected from the employee. The "Match Override" is the amount contributed by the employer.

Override Calculations

| Account | Account Description | Deduction Override | Match Override |
|---------|------------------------|----------------------|----------------------|
| HSA | HEALTH SAVINGS ACCOUNT | <input type="text"/> | <input type="text"/> |

HDHP Not Required Suppress Contribution Limits HSA PEO Match Override

If you have any questions or concerns regarding the setup of your Health Savings Accounts (HSAs) or Flexible Spending Accounts (FSAs), please contact My HR Professionals at (479) 474-7752.