FlexBank HRA Application

Legal employer name	
Address/City/State/Zip	
Phone number	Fax number
Contact name	Contact email address
Corporation type ☐ C Corp ☐ S Corp ☐ Partnership / LLP ☐ Sole Proprietor ☐ *LLC, files as _____ ☐ Other_____ ***If an LLC, you must note how your employer files their taxes (as a Partnership, C or S).* *Sole proprietors, partners within a partnership, owners of an LLC (filing as an S or partnership), owners of an LLP and more than 2% owners of an S-Corporation are **prohibited** from participating in an HRA. Rules of attribution apply to more than 2% S owners, thus owner's spouses, parents, children and grandchildren may **not** participate.*	
Tax ID Number	Health insurance renewal date
Health insurance plan -**please attach benefit summary from health insurance carrier**.	
Does health plan deductible reset each calendar year or at the same time as the health insurance renewal?	
Is your health plan self-insured or fully insured?	Exclude union employees? ☐ Yes ☐ No
If you have 100+ HRA participants and file a 5550, note the Plan Year 500 number that should be assigned to the HRA (i.e. 501, 502, etc.).	
Effective date of HRA	HRA Plan Year
Who is eligible to participate in the HRA (must be covered by your group health plan in order to be eligible for the HRA). ☐ Employee only ☐ Employee + covered dependents ☐ Employees covered by your group health plan, but in-eligible to contribute to an HSA.	
Describe the HRA plan design	
Covered Expenses (i.e. deductible, co-insurance, copays)	
Is the HRA benefit restricted to in-network expenses only or will it reimburse in- and/or out-of-network expenses?	
Is the full HRA benefit available on the first day of the plan year? ☐ Yes ☐ No Or do you restrict reimbursement to what has been accrued to date (i.e. per pay, monthly)?	
Do unused HRA benefits roll forward to be used in the next plan year? ☐ Yes ☐ No	If yes, what is the maximum rollover amount?
Do you offer a flexible spending account (FSA)? If yes, which plan pays first for eligible expenses? ☐ FSA ☐ HRA	
Do the HRA participants also contribute to health savings accounts (HSA)? ☐ Yes ☐ No	
Benefit end date (i.e. date of termination, end of the month of termination)	

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