

Health FSA steps before the plan year ends

- ☐ Find your plan year end date (Dec. 31, 2026 for a calendar-year plan) Now
- ☐ Check whether the plan has a carryover (up to \$680), a grace period or neither Now
- ☐ Latest grace period end for a Dec. 31 plan year, only if the plan has one Mar. 15, 2027

- ☐ Check your balance in the benefits portal Now
- ☐ Ask the administrator for the claims deadline Now
- ☐ Keep receipts for every eligible expense Now
- ☐ Note your 2027 election Open enrollment

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