

**OKLAHOMA CONFERENCE OF THE UNITED METHODIST CHURCH
BOARD OF PENSION & HEALTH BENEFITS
1501 N.W. 24th
Oklahoma City, OK 73106**

FLEXIBLE SPENDING ACCOUNT SUMMARY

The Flexible Benefits/Cafeteria Plan adopted by the Oklahoma Conference of The United Methodist Church provides eligible employees the option of paying their basic medical premiums (including voluntary dental and vision provided by the Oklahoma Conference) and other qualified medical or dependent care expenses with pre-tax dollars through a salary-reduction agreement with their salary-paying unit.

Eligible Participants include: all licensed or ordained clergy under appointment in the Oklahoma Conference who are certified by their District Superintendent as living on the charge and working at least 20 hours per week on their pastoral duties. Lay persons who are employed by a local church or conference agency and are certified by their supervisors as working at least 20 hours per week and earning at least the minimum wage are also eligible for enrollment.

Medical Expense Reimbursement Account

All medical expenses incurred, up to an annual limit of five thousand dollars (**\$5,000**), within the applicable contract period that are not paid by your medical insurance, such as dental care, eyeglasses & exams, and insurance co-pays or deductible amounts can be included in your Medical Reimbursement Account. In making your decision, it is advisable to calculate the amount of out-of-pocket medical expenses you have incurred during the past several years.

Dependent Care Assistance Account

To qualify for this account, the employee must be single, or both the employee and their spouse must be employed outside the home, or one of the marriage partners must be employed and the other attending school.

Expenses incurred are up to an annual limit of five thousand dollars (**\$5,000**).

If you are interested in learning more about this option, please contact the Conference Office. There is a worksheet to help determine if this option would be advantageous to you.

GENERAL INSTRUCTIONS

To enroll in the Flexible Benefit/Cafeteria Plan you must complete an Election Form and return it to the Conference Treasurer's Office within thirty (31) days after you become eligible. To continue in the Plan a new Election Form must be completed and returned to the Conference Office by November 25th for each new calendar year. The amounts you want withheld from your salary for the Cafeteria Plan must be approved by your local church/Agency Board and signed by your Church/Agency Treasurer. Be sure your Treasurer keeps a copy of your Election form so he/she knows the total amount to be withheld and that the payments are to be sent the first of each month to the Conference Treasurer's Office, 1501 NW 24th, Oklahoma City, OK 73106.

- **Kempton Group is both our** Third Party Administrator for the Oklahoma Conference Health Benefits Plan and our Flexible Spending Account (or Cafeteria Plan) Administrator.
- **Reimbursement forms may be mailed to: Attention Section 125 Department
P O BOX 54889, Oklahoma City OK 73154
Or faxed to: (405) 556-6231**
- **Account balances available 24 hours a day – www.kemptongroup.com**
- **Toll free access to Kempton Group Customer Service for questions about the plan 800-521-1711 (have your Group number ready—KUMC50.)**
- **Direct Deposit Authorization:** One of your benefits is the ability to have your Section 125 reimbursements deposited directly into your checking or savings account. If you would like to take advantage of this wonderful benefit please complete the authorization and return the form to Kempton Group. A paper check can be issued, however, if it is lost there is a \$30 reissue service charge.
- **Section 125 Rollover option may be checked on your election form** which lets you choose to have co-pays and deductibles for medical expenses, prescription drugs, vision and dental claims automatically rolled over into your checking or savings account. In the case of receipts for any expenses that don't run through Kempton Group, you will still be required to fill out a manual claim form to be filed for reimbursement.

Please be aware that you can view a wealth of information regarding your medical plan and/or cafeteria plan by visiting Kempton Group at www.kemptongroup.com. Their integrated website should be your one-stop shop for access to information on service providers, healthful links and claim history.

*Claim forms and other health plan information may be obtained on our website at:

www.okumc.org/healthcarebenefits