



BBP Admin
BENEFITS ADMINISTRATION
COBRA, FMLA, FSA, HRA, HSA, TRANSIT
 info@bbpadmin.com
 www.bbpadmin.com
 630 773 2337

Move Funds Form

Employer Name: _____

Your Name: _____

Email and/or Phone Number: _____

- Step 1: Do I have enough funds in the account I want this charge to come out of?
 - Yes
 - No – I have partial funds in my previous year account to cover my transaction made in the current plan year (I understand I owe the remaining balance)
 - No – I have no funds in my previous year account to cover my transaction made in the current plan year (I understand I owe the entire balance)
- Step 2: I understand I used my Benefits Card in the current plan year to pay for a previous plan year expense. I understand funds from the previous year will be moved forward (credited) as an “other deposit” to fund my current plan as well as funds from the previous year will be removed (debited) as an “other deposit” to account for the transaction.
- Step 3: I have attached the proper substantiation to confirm the funds to be transferred to the proper plan year.
- Step 4: Complete the information below for all transactions to be moved to a different account.

Transaction Date	Date of Service	Amount of Transaction	From Account (year and plan)	To Account (year and plan)	Balance Available in Account moving to	Amount I owe	Method of Reimbursement (Participant Portal, Credit Card, Electronic Check, Paper Check, Offset)

- Step 5: I understand it may take up to 10 business days for funds to move between accounts and/or to confirm repayment to the plan if funds are not available.
- Step 6: Participant Signature _____ Date: _____
- Step 7: Employer Signature _____ Date: _____
- Step 8: Submit this Move Funds Form with the substantiation to claims@bbpadmin.com

HRA & FSA Debit Card Claims - New Plan Year Rules



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HRA and FSA Medicals with \$500 Rollover claims are less flexible than other pre-tax plans where you cannot use your debit card in the New Plan Year to pay for claims incurred in the previous plan year.

After the end of the plan year, any claims from the previous plan year need to be submitted manually to our office – via mobile, online, e-mail, fax or mail. Please see our claim submittal options page for more detail by [clicking here](#).

If you end up using your debit card for previous plan year charges, the debit card will take the money from your current plan, follow these instructions:

1. Fill out the Move Funds Form – this is found on the back of this sheet or on our website. You will need to include substantiation via e-mail to claims@bbpadmin.com with the completed Move Funds Form.

If you do not have enough money from the previous year the following will happen:

- Your debit card will be shut off
- You are required to pay back the account via your own form of payment. Your debit card will remain shut off until the payment is collected.

If you use the debit card after the runout period (typically 90 days after the plan end date), the following will happen:

- Your debit card will be shut off
- You are required to pay back the account via your own form of payment. Your debit card will remain shut off until the payment is collected.

If your claim was legitimate and your employer wants to extend the runout and the claim is approved, money from the previous year will be moved forward as an “other deposit” to fund your current plan with previous money.