

Subject line:

Upcoming changes to your state of Wisconsin pre-tax benefits

Preview text:

Your pre-tax benefits are moving to a new administrator — here's what you need to know.



This letter is to inform you of important changes coming to your pre-tax account(s). You are receiving this letter because you are a participant in one of the following State of Wisconsin Department of Employee Trust Funds (ETF)/Optum pre-tax accounts. Health Care Flexible Spending Account (FSA), Limited Purpose FSA, Dependent Day Care Account, Transit & Parking Account, and/or Health Savings Account (HSA).

These accounts will transition to a new administrator, Total Administrative Services Corporation (TASC), beginning January 1, 2026. Optum will no longer be ETF's third-party administrator for these benefit programs as of 2026.

Health care FSA or limited purpose FSA

- **Any remaining eligible 2025 balance (up to \$660) will be carried over in April 2026, and will be available with the new administrator in May, 2026.**
- You must provide required substantiation documentation for all 2025 claims by December 31, 2025, to avoid possible payroll withholding during the runout period (January 1-March 31, 2026). If your FSA claim is subject to payroll withholding, any eligible carryovers may be delayed until mid-May 2026.

To avoid a delay in receiving your carryover funds, submit all substantiation documentation in the Optum web portal before Dec. 31, 2025.

- Any outstanding 2025 claims must be resolved with the required substantiation documentation during the runout period, ending March 31, 2026. Outstanding claims after the runout period will be moved into a business debt collection process through ETF collections. Participants can provide substantiation through the runout period using Optum's [web portal](#) or mobile app.
- Optum debit cards will be active through December 31, 2025. Effective January 1, 2026, Optum debit cards will be deactivated for these benefits, and no new claims may be incurred using the Optum debit card. Claims incurred during 2025 may be submitted through the runout period using Optum's [web portal](#) or mobile app.

Dependent day care account

- You must use your available account balance in 2025.
- Any outstanding 2025 claims are required to have requested substantiation documentation submitted during the runout period that ends March 31, 2026. After the runout period, any remaining 2025 balances will be forfeited. Claims incurred during 2025 may be submitted to Optum via the web portal or mobile app during the runout period.

Transit and parking

- **Any remaining eligible 2025 balances will be carried over in April 2026 and available with the new administrator in May, 2026.**
- Optum debit cards will be active through December 31, 2025. Effective January 1, 2026, Optum debit cards will be deactivated for these benefits, and no new claims may be incurred. Claims incurred during 2025 may be submitted to Optum via the web portal or mobile app during the runout period.

Health savings accounts

- You can transfer your HSA assets to the new administrator by using an account holder form. Detailed instructions for completing the account holder form will be provided during the 2026 open enrollment period.

- If your HSA balance remains with Optum, you will be charged a \$3.00 monthly administrative fee starting April 2026. This fee will be automatically withdrawn from your Optum HSA.
- You will receive additional information and detailed directions about your HSA balance before the open enrollment period. **Action is required to transfer your HSA assets from Optum to the new administrator.**

Contact Optum Customer Service if you have questions concerning your account at **1-833-881-8158**. Thank you.

Sincerely,

Optum Customer Service

Health savings accounts (HSAs) are individual accounts held at Optum Bank®, Member FDIC, unless otherwise indicated, and administered by Optum Financial, Inc. or ConnectYourCare, LLC, an IRS Designated Non-Bank Custodian of HSAs, a subsidiary of Optum Financial, Inc. Neither Optum Financial, Inc. nor ConnectYourCare, LLC is a bank or an FDIC insured institution. HSAs are subject to eligibility requirements and restrictions on deposits and withdrawals to avoid IRS penalties. State and/or local taxes may still apply. Fees may reduce earnings on account. Refer to your HSA account agreement for details.

Flexible spending accounts (FSAs), dependent care assistance programs (DCAPs), health reimbursement arrangements (HRAs), Commuter and Parking Benefits, Tuition Assistance Plans, Adoption Assistance Plans, Surrogacy Assistance Plans, Wellness Benefits, and Lifestyle Accounts (collectively, "EmployerSponsored Plans") are administered on behalf of your plan sponsor by Optum Financial, Inc. or ConnectYourCare, LLC and are subject to eligibility and restrictions. Employer-Sponsored Plans are not individually owned and amounts available under the Employer-Sponsored Plan are not FDIC insured.

This communication is not intended as legal or tax advice. Consult a legal or tax professional for advice on eligibility, tax treatment and restrictions. Please contact your plan administrator with questions about enrollment or plan restrictions.

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