
Accessing the Discretionary Benefit Plan for Excluded Staff Procedure

Policy Sponsor:	Director, Human Resources
Name of Parent Policy:	Discretionary Benefit Plan for Excluded Staff
Policy Contact:	Benefits Coordinator, Human Resources
Procedure Contact:	Health Spending and Professional Development Allocations - Benefits Unit, Human Resources. Allocations, lump sum payments and related payroll and taxation issues - Payroll Services.
Effective Date of Procedures:	January 1, 2010
Review Date:	Annually

Purpose

To provide information on how excluded staff can allocate Discretionary Benefit Plan funds.

Definitions

Excluded staff Excluded managers, excluded professionals and excluded support staff members that, by virtue of their employment roles, have an excluded employment contract with the University. These positions are out-of-scope and excluded from membership in a union or faculty association, and therefore are not covered under one of the collective agreements.

Procedures

Eligible employees will be provided Plan funds once each year, which can be allocated at the beginning of employment and normally once each year, among the following options. Selection is made in May, to become effective in July 1 each year.

Health Spending Account (HSA)

Members may allocate up to the total of available Plan funds to their Health Spending Account once per year, normally in May.



On an ongoing basis, the funds will be available for use starting July 1. The University's benefit provider (currently Blue Cross) will automatically review and process claims through the core benefit plan and then through the member's Health Spending Account.

To request, submit a signed Discretionary Benefit Plan Allocation form to Payroll Services.

Refer to the following claim procedures.

<http://www1.athabasca.ca/hr/benefits/healthspendingclaimprocedures>

The University is not responsible for any amounts not allowed or allowed only in part by the benefit provider.

Lump Sum Payment

A lump sum payment can be selected once per year, normally in May, up to the total of available Plan funds for the year. Applicable income tax and any other required employee deductions will be withheld from the lump sum amount, and the net payment will be included with the next regular payroll payment processing.

The withholding taxes that apply to lump sum amounts may or may not cover all of the applicable income tax, depending on the member's personal tax situation. The University is not responsible for any additional income tax that may be payable on lump sum amounts.

To request, submit a signed Discretionary Benefit Plan Allocation form to Payroll Services.

Professional Development Fund

The residual of any unallocated Plan funds will be allocated to the Member's Professional Development Fund, and expenditures will be subject to the normal requirements and maximum for Professional Development funds.

Members who leave the employ of the University will not receive a payout of unused Professional Development Funds.

Taxation

Members are responsible for any personal or other taxes that apply to Plan payments or benefits.

Applicable Legislation and Regulations

[Income Tax Act](#)



Related References, Policies, Procedures and Forms

[Discretionary Benefit Plan for Excluded Staff Policy](#)

Discretionary Benefit Plan Allocation Form (in development)

[Alberta Blue Cross Health Spending Account Claim Procedures](#)

History

Replaces Flexible Benefit Guidelines for Excluded Support Staff.

Replaces 1% Health & Wellness Fund for excluded managers and professionals