Lifestyle Spending Account

Human Resources, Benefits Administration
What is a Lifestyle Spending Account (LSA)?

- University Funded Account
- Reimbursement for Eligible Expenses
- Quarterly Benefit
Lifestyle Spending Account Eligibility

**Eligibility**

- Full-time and part-time (at least 50% FTE) Ohio State employees in a regular, term or seasonal position*

  - No enrollment required

- Must be hired in an eligible position on the first calendar day of the quarter to receive the LSA benefit for that quarter.
  - January 1
  - April 1
  - July 1
  - October 1

- Employees hired or who become eligible after the first day of a calendar quarter will receive the LSA benefit the next quarter that they are eligible.

* This benefit is not available for individuals employed by external entities, including Nationwide Children's Hospital, Central Ohio Technical College, OSU Physicians and Faculty Club.
Lifestyle Spending Account Eligible Expenses

- Gym Membership
- Cooking Classes
- Home Fresh Food Meal Delivery
- Emergency Car Repair
- Museum, Zoo, Botanical Garden
- Athletic Apparel
- Board Games & Puzzles
- National / State Park, Camping Fees
How do I file for reimbursement?

Submit a Claim
To Health Equity with documentation, such as receipts

Reimbursement Window
15-days from end of quarter to submit reimbursement request

Unused Funds
LSA funds remaining at the end of each quarter, do not carry over to the following quarter

Multiple Claims
You may submit multiple claims per quarter, to a maximum reimbursement of $125
Lifestyle Spending Account **Taxation**

1. Payments made to you from your LSA are considered taxable income at the time of reimbursement.

2. Ohio State will receive a record of reimbursements and process the taxes in your pay shortly after reimbursement.

3. You will **not** pay taxes on LSA funds that you do not use.
Lifestyle Spending Account
Required Documentation

Itemized invoice or receipt MUST include all components

- Date of purchase or service period
- Service provider/Merchant name
- Amount that was paid
- The employee’s full name
- Description of the eligible well-being product or service

If the receipt does not include the description or employee full name, they can be handwritten on the receipt, but all other elements must be printed from the merchant.
Tools and Resources

To Access Your Online Account

**Step 1:** Log into *Workday*

**Step 2:** Click **Menu** Icon

**Step 3:** Click **Benefits and Pay Hub**

**Step 4:** Under Suggested Links – click **More Benefit Links**

**Step 5:** Click **My FSA/HRA/ LSA** (Health Equity)
Questions

HR Connection Portal:
HRConnection.osu.edu

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