



THE OHIO STATE UNIVERSITY

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HUMAN RESOURCES

# Lifestyle Spending Account (LSA)



## **Lifestyle Spending Account Overview**

- A university-funded account for personalizing your benefits by getting reimbursed for eligible expenses that support overall health and wellness.
- You can use these funds for purchases and activities related to emotional, physical, financial and social well-being.





## Eligibility

- Full- 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.
- Those 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



## Quarterly Schedule

Reimbursement of eligible expenses  
up to **\$125/quarter**

- First Quarter: January 1<sup>st</sup> – March 31<sup>th</sup>
- Second Quarter: April 1<sup>st</sup> – June 30<sup>th</sup>
- Third Quarter: July 1<sup>st</sup> – September 30<sup>th</sup>
- Fourth Quarter: October 1<sup>st</sup> –  
December 31<sup>st</sup>



## **Examples of eligible expenses (such as, but not limited to):**

- Fitness Center, Club, Gym or Studio Membership and exercise equipment
- Fitness trackers or apparel
- App Membership (Emotional Wellbeing, Health, Fitness, Budgeting)
- Board Games, Puzzles, and Books
- Home Fresh Food Meal Delivery Services
- Museum, park, zoo passes membership or entry fees
- Personal development classes and supplies (i.e. art, music, cooking, etc.)
- Financial services (advising/planning)





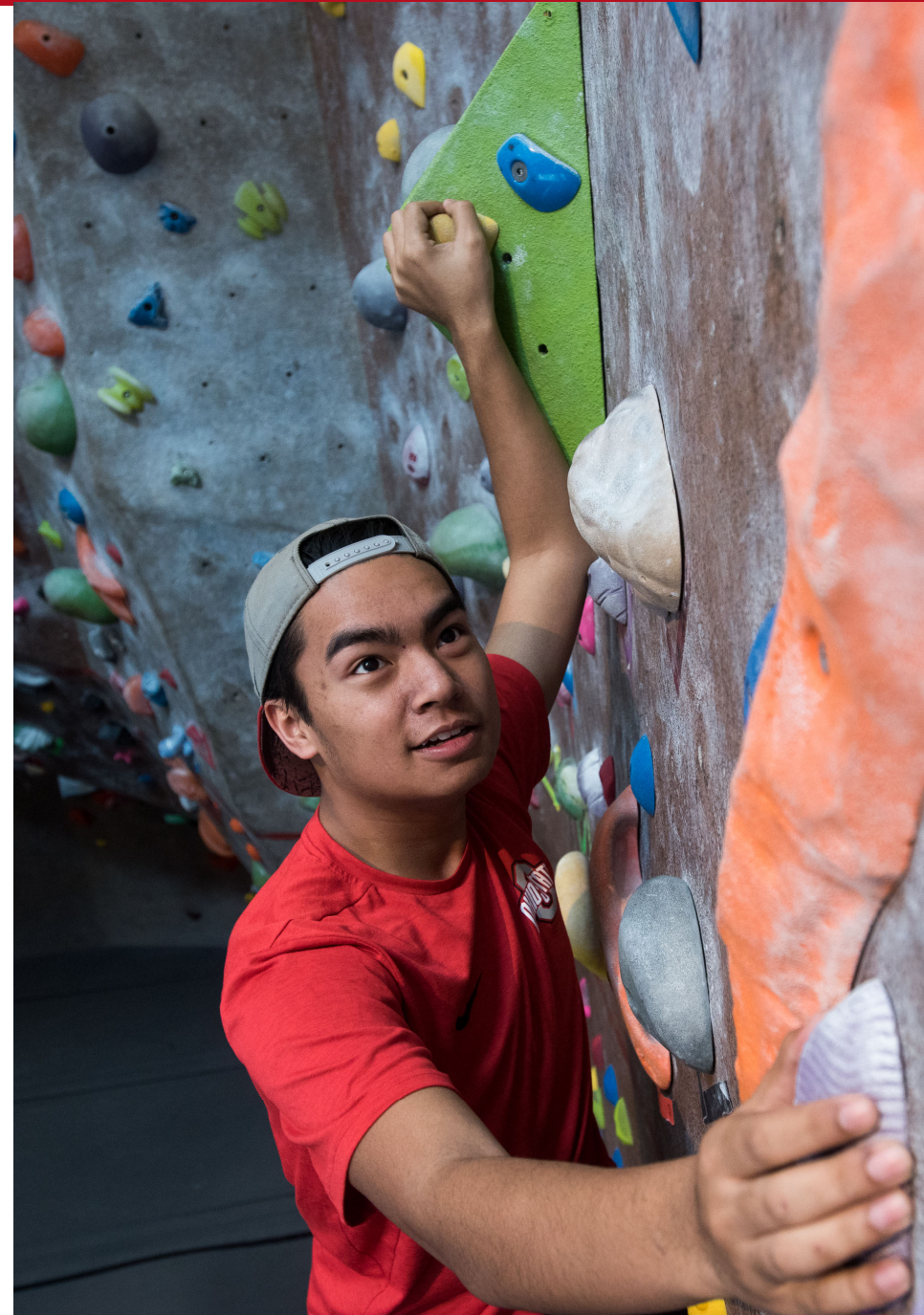
## **Example of *Ineligible* expenses (such as, but not limited to):**

- Expenses eligible for reimbursement under your FSA or HRA
- Reimburse your employee benefit contributions
- Weapons, weapon components or ammunition
- Sports betting/lottery/gambling apps & games
- Restaurants and alcohol
- Any expenses not explicitly listed at **[hr.osu.edu/benefits/lsa](https://hr.osu.edu/benefits/lsa)**



## To be reimbursed from your LSA:

- Submit a claim to the administrator with documentation, such as receipts.
- You have **15 days** from the end of each calendar quarter to submit a reimbursement request for eligible expenses incurred in that quarter. For example, you have until April 15<sup>th</sup> to submit reimbursement claims for purchases made January 1 – March 31<sup>st</sup>.
- Unused LSA funds remaining at the end of each calendar quarter **do not carry over to the following quarter.**
- You may submit multiple claims each quarter, but **you will only be reimbursed up to the benefit maximum of \$125 each quarter.**





## Taxation:

- Payments made to you from your LSA are considered taxable income at the time of reimbursement.
- Ohio State will receive a record of reimbursements and process the taxes in your pay shortly after reimbursement.
- You will **not** pay taxes on LSA funds that you do not use.





## Required Documentation

When submitting a claim for reimbursement, the itemized invoice or receipt **MUST** include all components, or it may be denied.

- 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.

A fully handwritten receipt is not acceptable.

**Service Provider or  
Merchant Name**

**Date of purchase**

**Product/Service/Item.....**

**.....\$ Paid Amount**

**Employee Full Name**

**Description of item or  
purchase**



## To Access Your Online Account

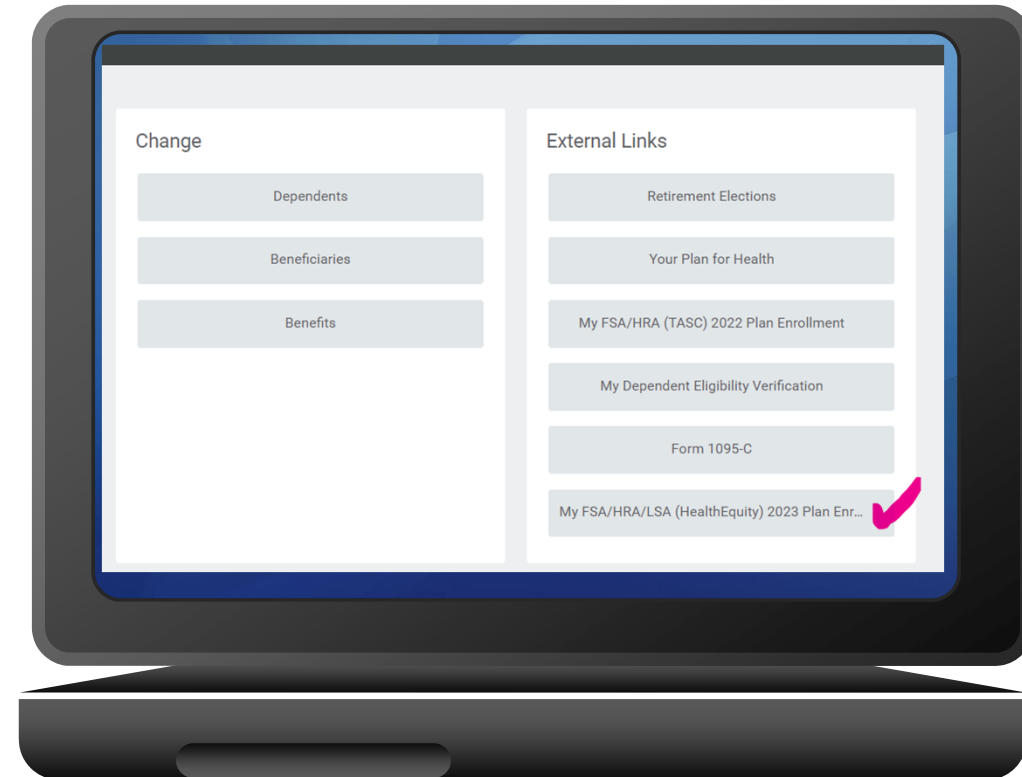
**Step 1:** Log into Workday

**Step 2:** Click the Global Navigation Panel Menu icon  MENU

**Step 3:** Click the Benefits Shield on the applications menu  Benefits

**Step 4:** Under external links  
Click My FSA/HRA/LSA (HealthEquity)

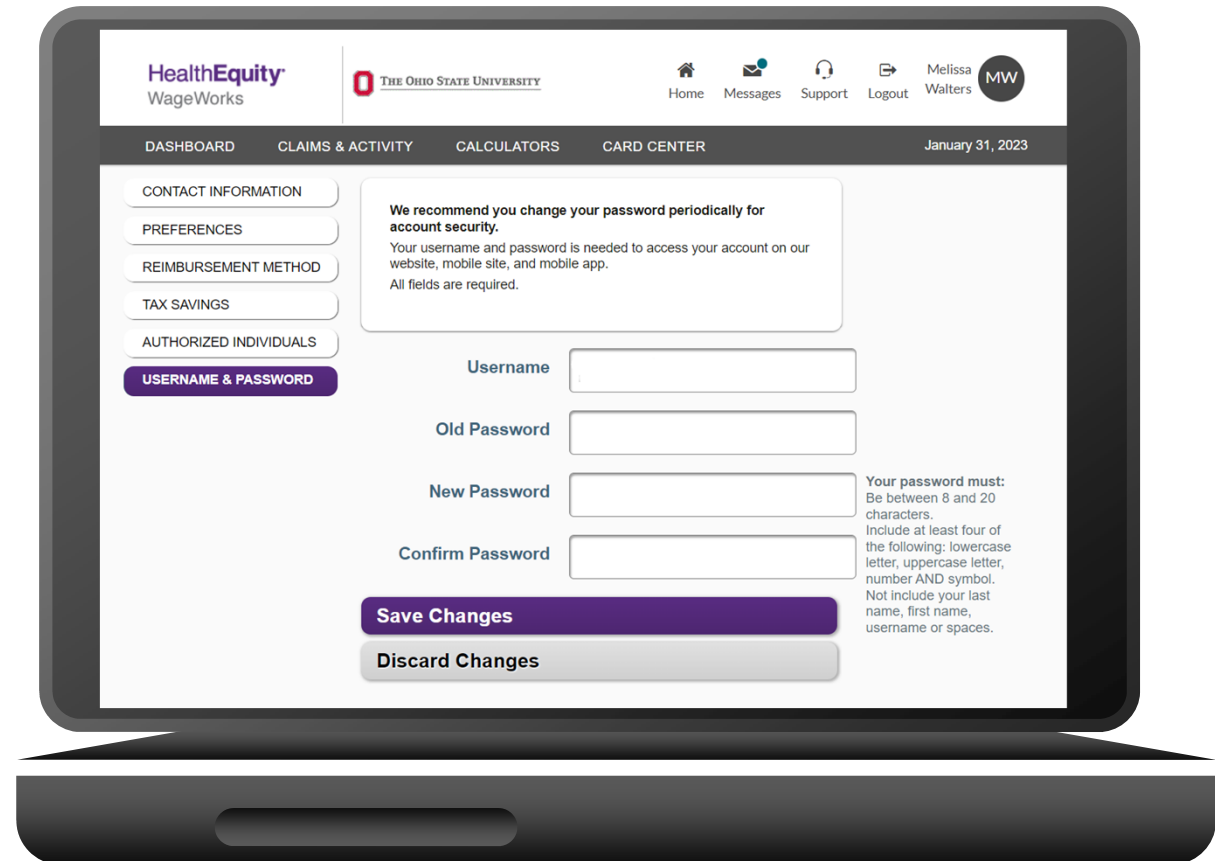
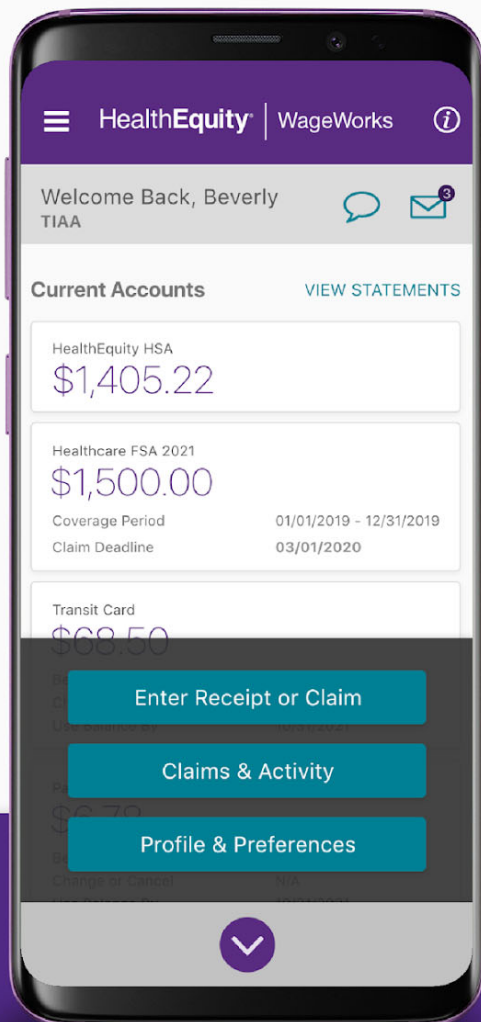
**Step 5:** Check your account balance,  
track expenses and file claims for  
reimbursement.





Meet your updated

## HealthEquity | WageWorks mobile app

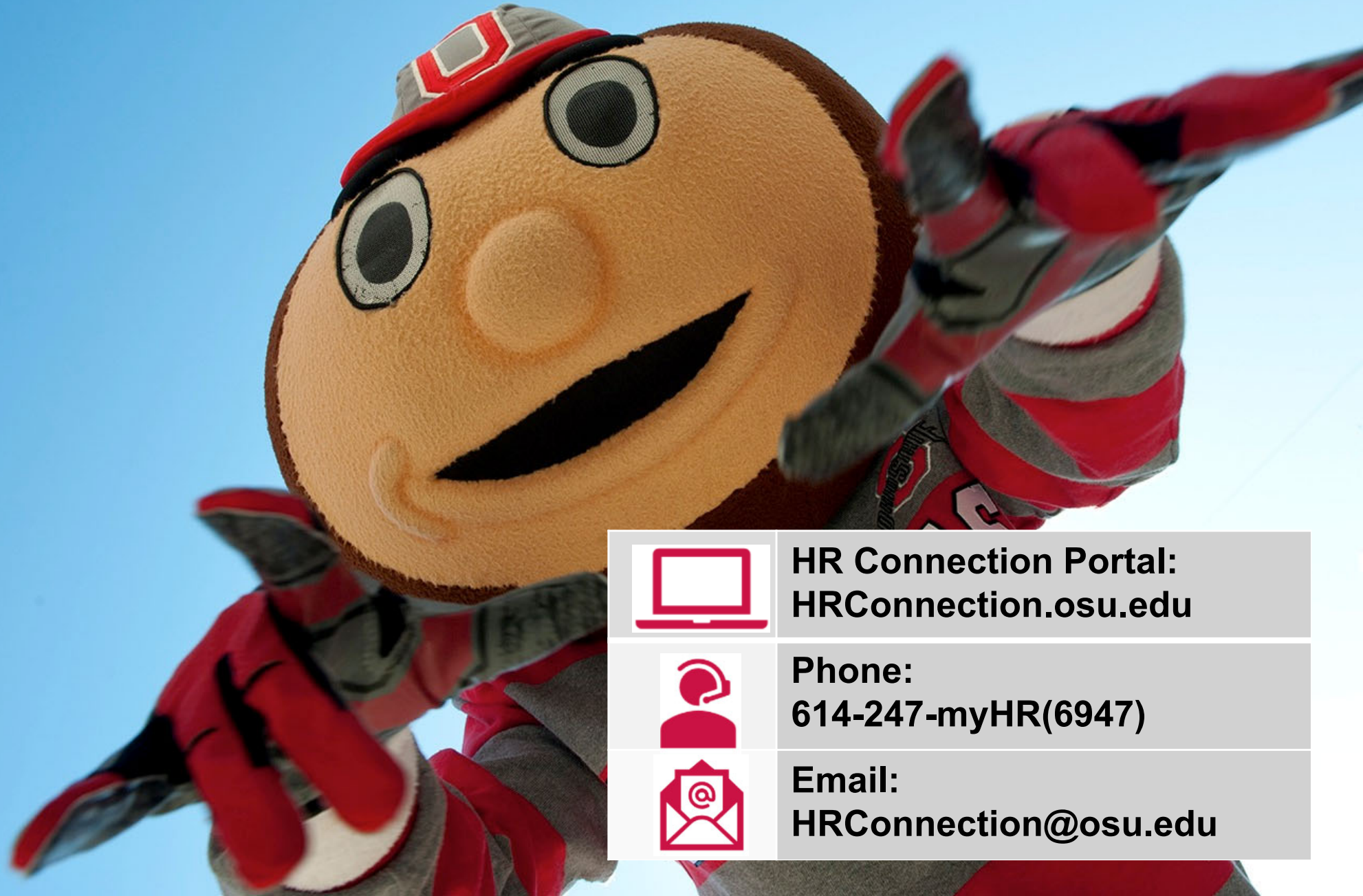


**Set up a username and password,  
under “Profile” to utilize the mobile  
app**



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# Questions?



**HR Connection Portal:**  
**[HRConnection.osu.edu](http://HRConnection.osu.edu)**



**Phone:**  
**614-247-myHR(6947)**



**Email:**  
**[HRConnection@osu.edu](mailto:HRConnection@osu.edu)**