

Self Administered Plans



We make *self-administration* easy.

We provide the forms and materials you need to administer a Section 125 or 105 plan on your own.

We help you administer your plan.

Whether you're looking to administer a Section 125 Cafeteria Plan or a Section 105 Health Reimbursement Plan on your own, we offer the comprehensive forms and information materials you need as well as a dedicated Client Service Consultant and ongoing support to help you make your plan successful.

Online access to forms and materials

Employers can log in to their account through My Account Administrator to review their plans and download all necessary forms and materials whenever they like. Our Compliance team ensures these materials are up to date with current IRS regulations.

Dedicated Client Support

We assign each employer a dedicated Client Service Consultant, their personal source of account information and assistance. Each Client Service Consultant has a direct phone number and email address for quick contact.

Section 125 Self-Administered Plans

With Section 125 Self-Administration, employers administer their own Flexible Spending Account (FSA) plan. We also perform a comprehensive, year-end Nondiscrimination Test.

The employer carries out the day-to-day administration, including enrollment and claims processing.

Nondiscrimination Testing

Our in-house Compliance team completes required annual Nondiscrimination Testing for Section 125 Self-Administration clients. The employer simply provides basic plan and participant data, and we perform the testing and highlight any issues that need to be corrected.

Section 105 Self-Administered Plans

Section 105 Self-Administration provides the forms and materials employers need to administer their own Health Reimbursement Arrangement (HRA).

The employer carries out the day-to-day administration and claims processing.

Self-Administration Details

Section 125 Cafeteria Plan

Services Include:

- Document updates due to regulatory changes
- One annual IRS Form 5500 if required
- One nondiscrimination test per Plan Year
- 24/7 secure access to www.ebcflex.com
- Ongoing, toll-free customer service support
- Dedicated Client Service Consultant

Materials Include:

- Plan Document
- Summary Plan Description
- Quickstart Guide
- My Company Plan
- Claim Form
- Leaves of Absence Form
- Enrollment Form
- Certificate of Resolution Amendment Form
- Update Contacts Form
- Termination of Elections Form
- Digital Document Guide
- Certificate of Resolution Plan Adoption
- Direct Debit Form
- Medical Mileage Expense Receipt Form
- Nondiscrimination Census Excel Worksheet
- Nondiscrimination Testing Workbook
- Add-ons materials for extra plan design features (grace period, rollovers, HSA compatibility, etc.)

Section 105 Health Reimbursement Arrangement

Services Include:

- Document updates due to regulatory changes
- 24/7 secure access to www.ebcflex.com
- Ongoing, toll-free customer service support
- Dedicated Client Service Consultant

Materials Include:

- Plan Document
- Summary Plan Description
- Quickstart Guide
- Nondiscrimination Testing Worksheet
- My Company Plan
- Update Employer Information Form
- Certificate of Resolution Amendment Form
- Direct Debit Form
- Digital Document Guide
- Claim Form
- Update Contacts Form



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[Learn more about Self-Administration.](#)

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