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# Flexible Spending Account Claim Form

I.	EMPLOYER NAME:					PLAN YEAR ENDING					
II.	PARTICIPANT NAME:				SOCIAL SECURITY NUMBER:						
III.	insurance,	AL EXPENS attach an item ed as document	ized bill/ rec	<b>S</b> Plea eipt tha	se attach an Exp at includes all of	lanation of Benef the information b	its from yo pelow. <i>Car</i>	ur insurance comp nceled checks and	any; o bills si	or, if not covere howing a baland	ed by ce only canno
Patie	nt Name	Relation to Employee	Date of Service	Description of Service/Name of Medication		Physician, Provider or Merchant		Is there insurance coverage for this service? If so, an EOB is required.		Amount Incurred	Benefit Code (Office use on
								□ Yes □ I	No		
								□ Yes □ I	No		
								□ Yes □ I	No		
								☐ Yes ☐ I	No		
								☐ Yes ☐ I	No		
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								☐ Yes ☐ I	No		
					TOTAL	MEDICAL CL	AIMS	REQUESTED		\$	
De	pendent	Employe	e Servi	ice			Secur	rity Number		ncurred	Code (Office use only)
					TOTAL DEPE	NDENT CARE	CLAIMS	REQUESTED	\$		
service/ certifies Over th from yo a medic through she is fu and tha be liable The unc	The uno gned was of product de that the et e Counter our physicial cal practition. The exp a any other ully respon t unless ar e for the pa	dersigned part covered under excribed above expenses are f Medications, t an stating the oner, may be r benses hereby health plan of sible for the s an expense for ayment of all	ticipant in to this FLEXI e on the da for medical the items at medical ne required to presented to which payn related taxes tands that	he pla BLE B tes ind care a re use cessit confir for re cludin and ac nent c es incl no me	EENEFIT PLAN a dicated. In the and NOT for control ed to treat a spe y. It is also un im that the exp eimbursement f ag other flexible curacy of all into or reimbursement duding Federal dedical or depen	the above expend that they, to case of a Med smetic purpose ecific medical coderstood that alense is to treat from the Plan he spending arraformation relation to Calmed and the Calmed and the care expedition that care expending arraformation calmed and care expedition that the care expedition is claimed and care expedition that the care expedition that the care expedition is claimed and care expedition that the care expedition is claimed as the care expedition in the care expedition is the care expedition that the care expedition is the care expedition in the care expedition in the care expedition is the care expedition in the care expedition in the care expedition is the care expedition in the care expedition in the care expedition is the care expedition in the care expedition in the care expedition is the care expedition in the care expedition in the care expedition is the care expedition in the care expedition in the care expedition is the care expedition in the care expedition in the care expedition is the care expedition in the care expedition in the care expedition is the care expedition in the care expedition in the care expedition is the care expedition in the care expedition in the care expedition is the care expedition in the care exp	heir spousical Reimb is or for go ondition a additional is a specific ave not be ingements ing to this is a proper to tax on the nse tax de	re incurred during the or dependent pursement Requested and you have substituted in the condition of the con	has rest, the pose omittee sibly on. and wed full brovid the p which is pose.	received the ne undersigne is and that, if ed a letter or pincluding a strictly understance led by the understance in the understance in the understance is a supermitted for a	d also a claim for prescription atement fror abursed ls that he or dersigned, rsigned will ch expense.
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mail add	ress										

## **Explanation to Participants**

To submit a request for reimbursement, you must complete this form, sign it and attach the documentation needed to verify that your expenses are qualified for reimbursement under the Plan. Return the completed form with the documentation attached to your Benefits Coordinator or directly to Benefits, Inc.

#### \*\* MEDICAL EXPENSE CLAIMS \*\*

Please list and attach the Explanation of Benefits (EOB) from your insurance company or invoices (if the service is not covered by insurance and, therefore, no EOB is available). If you are providing documentation other than the EOB from your insurance company, these documents must be from the third parties who provided the medical services and must show *the names of the providers, the dates that services were provided, the amounts charged for the services, and a brief description of the services.* 

In general, the types of medical services which can be reimbursed by the Plan are the same types of expenses which the Internal Revenue Service would allow for the medical and dental expense deduction under Internal Revenue Code Section 213. Some examples include: Medical and dental expenses which are covered but not paid by insurance (deductibles, co-payments), and items allowed be IRC Section 213 that are not covered by your insurance plan (ie., vision and hearing expenses, dental care, routine examinations, prescription drugs. Please refer to the Summary Plan Description and the Plan document for a more complete explanation of qualified expenses.

Please enter the total amount that you are requesting for reimbursement, based on the documentation you have attached. At any time during the plan year, you may request reimbursement for expenses that may exceed the amount that you have deposited into your Flexible Spending Medical Account. However, your reimbursement cannot exceed the amount that you have committed to contribute for the Plan Year, minus any reimbursements you have already received for the Plan Year. Special rules apply if you terminate employment or otherwise end your participation in the Plan. Please refer to the Summary Plan Description and the Plan document for a more complete explanation of the maximum reimbursement amount.

### \*\* DEPENDENT CARE EXPENSE CLAIM \*\*

Please list and attach invoices issued by the third parties who provided the dependent care. This documentation must show *the name and tax identification number of the provider, the dates that services were provided, and the amounts charged for the services.* 

In general, the types of expenses for dependent care services which can be reimbursed by the Plan are the same types of expenses which the Internal Revenue Service would consider for the dependent care tax credit as employment-related expenses under Internal Revenue Section 21(b)(2). Expenses must be for dependents under the age of 13 or incapable of caring for themselves. Please refer to the Summary Plan Description and the Plan document for a more complete explanation of qualified expenses.

Expenses must be for services that you received during the same period that you make contributions into your dependent care reimbursement account. And, you cannot ask the plan to reimburse you in advance. For example, if you start contributions with the pay period that begins on February 1, on February 2 you can submit a claim for child care given on February 1, but not for care given on January 31 or for care to be given in March.

Please enter the total amount that you are requesting for reimbursement, based on the documentation you have attached. If your expenses qualify for reimbursement from the Plan, you will be reimbursed for the total of your expenses, but not more than your account balance in the Plan. Your account balance is the total of the contributions you've made into your Dependent Care Flexible Spending Account minus the reimbursements you've received for the Plan Year.

#### \*\* STATEMENT BY PARTICIPANT AND SIGNATURE \*\*

Besides providing the information that is needed to prove that your claim is for qualified for reimbursement, you must sign this form on the reverse side. You are thereby swearing that you have not and will not submit the expenses claimed for reimbursement from another Flexible Benefit Plan or use these same expenses in order to receive a tax deduction or credit on your annual income taxes.