

Read Carefully

CLAIM FILING INSTRUCTIONS

Who Can File a Claim Form

- Only employees participating in the FSA Plan can file a reimbursement claim form.
- Employees can file a claim form during the plan year and for a certain period after the plan year as described in the Summary Plan Description.
- Terminated employees can file a claim form for a certain period after the date of termination if allowed by the Plan. Please see your Summary Plan Description.

What Expenses Can be Claimed

- Only expenses incurred during the plan year can be claimed for reimbursement. Each year is treated separately and the year of claim is the year the expense was actually incurred by the participant. It is imperative to send separate claim forms for each year.
- Terminated employees can request reimbursement for expenses incurred during the time period for which contributions were received. Please see your Summary Plan Description.
- Allowable expenses are the same as those allowed for tax purposes. A summary list is provided here for your convenience.

Qualifying Dependent Care Expenses

- Expenses paid to a dependent care center or care provider
- Expenses paid for the care of a dependent under age 13
- Expenses paid for care of other dependents who are physically or mentally incapable of caring for themselves.

Completion of the Claim Form

- Complete all information on the claim form for each amount claimed for reimbursement.
- Make sure the claim does not include items for more than one plan year. Use different claim forms for different years.
- You **must** sign and date the claim form.
- Attach a copy of a bill, invoice, or other written statement from a third party which supports each reimbursement request on 8.5" X 11" paper.
- If the Signature of Provider of Service is provided on the claim form, receipts are not required.

Complete the Reimbursement Claim Log

- Enter the total amount of each claim in this log.

How to Request Changes in Plan Participation

- Revocation of participation in the Plan can only occur if you have a change in family status. "Change of family status" includes birth, death, marriage, divorce, change of employment by the spouse, or certain other situations as determined by the Plan Administrator.