



# FSA Claim Form

Employer \_\_\_\_\_

Daytime Phone \_\_\_\_\_

Name \_\_\_\_\_

SSN (Last 4) \_\_\_\_\_

Email \_\_\_\_\_

Date of Birth \_\_\_\_ / \_\_\_\_ / \_\_\_\_

## Dependent Care Expense Claims

Name of Dependent(s)	Period Covered	Name, Address, and Taxpayer Identification Number of Service Provider	Amount
<b>Total Dependent Care Expense Claim</b>			

NOTE: No payment may be made under the Plan if the service provider is your dependent for federal income tax purposes or is your child or stepchild under 19.

## Unreimbursed Medical Expense Claims

Date Expense Incurred	Name of Service Provider	Expense Description	Person for Whom Expense Incurred	Net Amount
<b>Total Medical Care Expense Claim</b>				

**!** Please Attach Receipts to this Form

### Read Carefully

The undersigned participant in the Plan certifies that all expenses for which reimbursement or payment is claimed by submission of this form were incurred during a period while the undersigned was covered under the Company's Cafeteria Plan with respect to such expenses and that the medical expenses have not been reimbursed or are not reimbursable under any other health plan coverage. The undersigned fully understands that he or she alone is fully responsible for the sufficiency, accuracy, and veracity of all information relating to this claim which is provided by the undersigned, and that unless an expense for which payment or reimbursement is claimed is a proper expense under the Plan, the undersigned may be liable for payment of all related taxes including federal, state, or city income tax on amounts paid from the Plan which relate to such expense.

Employee Signature \_\_\_\_\_

Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_



## Instructions

Mail, fax, or email this form to:

EMPOWER  
7309 E 21<sup>st</sup> St. N Suite 110  
Wichita, KS 67206

Phone: (316) 687-3444 Fax: (316) 687-2113  
Email: [customerservice@empowerflex.com](mailto:customerservice@empowerflex.com)

- 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.
- **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 and shows the date the service was incurred.
- Copies of cancelled checks or credit card receipts are not valid receipts.

## Who can File a Claim Form?

- Only employees participating in the Cafeteria 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 the claim is the year the expense was actually incurred by the participant. It is imperative to send separate claim forms for each plan year.
- Terminated employees can request reimbursement for expenses incurred during the period for which contributions were received. Please see your Summary Plan Description.
- Allowed expenses are the same as those allowed for tax purposes except for long-term care premiums and expenses. A summary list is provided here for your convenience.

## Qualifying Dependent Day Care Expenses

Expenses, necessary for you and your spouse (if married) to be gainfully employed.

- Expenses paid to a dependent day care center or care provider.
- Expenses paid for the care of a dependent under age 13 that lives with you.
- Expenses paid for care of other dependents that live with you and are physically or mentally incapable of caring for themselves.

## Qualifying Un-reimbursed Medical Expenses

For a full list of expenses, please visit [empowerflex.com/eligibility-list/](http://empowerflex.com/eligibility-list/)