

FSA



**MERITAINSM
HEALTH**

**Dependent Care
Request for Reimbursement**

Complete and send to:
Meritain Health
Flexible Spending Accounts
PO Box 30111
Lansing, MI 48909
Fax: 1.888.837.3725

NOTE: Refer to your flexible spending account plan booklet for minimum and maximum dollar amount requirements for submitting expenses. Make copies of bills, receipts, and other supporting documentation for your files, as they will not be returned.

EMPLOYEE INFORMATION				
Name (last, first, initial)		Sex	Employer Name/Location	
Home Address		Identification Number		Birthdate
City	State	ZIP Code	Work Telephone ()	Home Telephone ()
Dependent's Name(s) (last, first, initial)		Dependent Age	Relationship to employee	

DEPENDENT CARE ACCOUNT EXPENSES

Attach an itemized receipt for each expense listed. Reimbursement will only be considered for expenses incurred within the dates you participate in this plan. Refer to your plan booklet for details on how long after your participation ends that you may submit eligible expenses.

Dependent Care Provider Information				
Name			Tax Identification or Social Security Number	
Address				
City	State	ZIP Code	Telephone	
Type of Service	Date(s) Incurred (From/To)		Amount	

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EMPLOYEE'S SIGNATURE REQUIRED

It is fraudulent to fill out this form with information you know to be false or to omit important facts. Criminal and/or civil penalties can result from such acts. I certify that the above information is correct. I also certify that I have not received nor will seek reimbursement previously for these expenses from the FSA or any other plan, and I know of no fact that makes me question whether this expense is properly reimbursable under the plan. I understand that reimbursement is not a guarantee that this payment is tax-free, and that reimbursed expenses cannot be used to claim a credit or deduction on my personal income tax return.

Signature _____ Date _____

Meritain Health Toll-Free Customer Service: 800-748-0003

Dependent Care Expenses Generally Eligible for Reimbursement (Source: IRS Tax Publication 503)

Under this Flexible Spending Plan, you may generally claim reimbursement for expenses for providing care and services for qualifying persons. These amounts consist of the cost of paying someone to care for any dependent who is under 13, your disabled spouse or any other qualifying dependent. You may generally claim up to the amount of your annual salary reduction, but in no event more than \$5,000 (or \$2,500 if you are married and file a separate income tax return). The care must be received in order to enable your employment.

You Should Claim

- Child or dependent care expenses that allow you to work or look for work;
- Expenses of qualified day care centers;
- Household services, such as services of a housekeeper, maid or cook incidental to care of a qualifying dependent;
- Only an amount paid that does not exceed your annual salary reduction;
- Costs of in-house baby-sitters, preschool tuition and summer day camps, cost of services provided outside the home if the dependent spends at least 8 hours per day in the home.

You Should NOT Claim

- Any items for which you intend to claim a tax credit;
- Educational expenses for any child in or beyond the 1st grade;
- Amounts in excess of your annual salary reduction;
- Cost of food, transportation, clothing, shelter, insurance, medical treatment or vacations of a qualifying dependent.

Who is a Qualifying Dependent?

- Your child or a brother or sister (or a descendent of your child or your brother or sister) who is under age 13 and for whom you can claim an exemption on your federal tax return;
- Your spouse who lives with you (for at least half the calendar year) and who is physically or mentally unable to care for himself or herself; and
- Any other person for whom you may claim an exemption on your federal tax return and who is physically or mentally unable to care for himself or herself.

Note: It is up to you to determine if someone is your qualifying dependent for the purposes of a Dependent Care FSA. You should consult a tax advisor if you have any questions about this.

Refer to IRS publication 503 for a more complete listing of all eligible and ineligible expenses.