To: All Employees  
From: Liz Van Keuren/ Tamisha Greenhill  
Date: October 25, 2019  
Re: Section 125 Flexible Spending Accounts

The District is conducting an “Open Enrollment” period during which time employees have the option to pledge money to their Flexible Spending Account (Health Reimbursement Account and/or Dependent Care Account) for the upcoming 2020 Plan year, which runs from January 1, 2020 to December 31, 2020.

As you are aware our Flexible Spending Section 125 Plan, Healthcare and Daycare is with FBA of Syosset, LLC. Annual re-enrollment is required, if you wish to continue contributing to the plan. Up to $500 can be carried over from one year to the next, if the monies go unused from the prior year. Any remaining amounts above $500, at the end of the spending period will be forfeit. Please be sure to review your 2020 Open Enrollment Packet and material.

On the reverse side of this notice is the enrollment form for the 2020 Plan year. You can find more information regarding the Flexible Spending Account (Health Reimbursement and/or Dependent Care) on the District’s web site. Go to the District tab, look for Forms and Documents, then under Forms and Documents you will see Payroll with a list of file hyperlinks below. Click on Flexible Spending Forms and Information. The enrollment form, reference booklet, claim for reimbursement and a list of eligible and ineligible expenses for the Health Reimbursement Account and/or Dependent Care Account are available.

Additional Flexible Spending Account Packets are available in the Main Office of your building.

Should you need assistance or have any questions pertaining to your 2020 Flexible Spending Account and related claims please call, FBA of Syosset Customer Service Team at 1-855-374-6431. Monday through Friday 9:00 AM to 5:00 PM Eastern Standard Time.

Please continue to send your FSA claims for expenses to FBA of Syosset, LLC at the address listed below:

FBA of Syosset, LLC  
100 Quentin Roosevelt Blvd., Suite 403  
Garden City, NY  11530  
www.fbanational.com

If you would like to take advantage of this benefit, please return the election form to me in the Business Office by December 2, 2019. The first deduction will be effective January 3, 2020.
RHINEBECK CENTRAL SCHOOL DISTRICT
FLEXIBLE SPENDING COMPENSATION PLAN
ELECTION FORM AND COMPENSATION REDUCTION AGREEMENT
PERIOD OF COVERAGE – 01/01/2020 THROUGH 12/31/2020

(Please Print)

1. PERSONAL DATA

Name: 
(Last) (First) (MI)
Marital Status: ______________________________ Soc. Sec. ______ - ______ - ______
Address: _______________________________ (Street) (Apt. #) (City) (State) (Zip)
Email: _______________________________ Work Phone: __________________ Home/Cell Phone: ____________

DEPENDENT INFORMATION (List ALL eligible Dependents Affected by Enrollment- attach additional sheet if necessary)

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Relationship (Self/Spouse/Child)</th>
<th>M/F</th>
<th>SS#</th>
<th>Date of Birth</th>
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<tbody>
<tr>
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<td>Self</td>
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2. PREMIUM ONLY

Health Insurance Payroll Deductions will automatically be pre-taxed. If for some reason you do not want this deduction pre-taxed, please contact Liz Van Keuren at the District Office.

3. FLEXIBLE SPENDING ACCOUNT CONTRIBUTIONS

( ) FLEXIBLE SPENDING ACCOUNT – The annual deposit in the Health Care Flexible Spending Account cannot exceed an amount of $2,700 or a minimum of $200.00.
Annual election amount $ ___________ $ ___________ for each pay period (contribution will be made in equal amounts through payroll deductions).

( ) DEPENDENT CARE ASSISTANCE PLAN – The Plan Year maximum cannot exceed 5,000.00 ($2,500 for married Participants who file separate returns).
Annual election amount $ ___________ $ ___________ for each pay period (contribution will be made in equal amounts through payroll deductions).

Qualified expenses incurred during the plan year 01/01/2020-12/31/2020. You have 90 days after the plan year to file your claim. All claims for expenses incurred from 01/01/2020-12/31/2020 must be postmarked no later than 03/31/2021, or your claim will be denied for late filing.

4. HEALTH INSURANCE WAIVER

( ) I hereby elect not to receive Health Insurance provided by the District; instead, to receive the Benefit Credit as
The District makes available to me in cash.

5. AUTHORIZATION AND ACKNOWLEDGEMENT

I understand that I cannot revoke or change this election during the year unless there is a qualifying "Status Change". The requested election change must be consistent and in line with the life qualifying event (QLE). I may then revoke my prior election and sign a new Agreement if such a change occurs. QLEs include a change in your legal marital status, birth of a child, date you adopt a child, death of spouse or dependent, loss of employment, or your child reaches the age 13 or change in child care services. Changes must be submitted within 30 days of the qualifying life event (QLE).

I understand that when I submit a claim and appropriate documentation (e.g. explanation of benefits from my Insurance Provider, itemized bill, etc.) for out-of-pocket Medical, Dental, Vision expenses before I can be reimbursed.

I hereby elect to participate in Flexible Spending Account as indicated on this form. I authorize Rhinebeck CSD to make pretax deductions from my salary on the payroll schedule I have elected above.

Employee’s Signature ________________________________ Date: __________________
FLEXIBLE SPENDING ACCOUNT
FSA 125
REFERENCE BOOKLET

• Enclosed please find important information regarding your 2020 Flexible Spending Plan.
• Instructions for our new FBA of Syosset Website - www.fbanational.com - where you may review your FSA account claim status, year to date contributions, account balance and electronic claim submission.
• Benefit Debit Card Information Enclosed
• Listing of eligible and non-eligible expenses (IRS 125). You can also visit the www.FsaStore.com for a list of eligible and non-eligible expense. This website is also available for you or a family member use his/hers FBA benefit debit card to purchase eligible expenses.
• Guidelines for submission of claims.
• Health Care Spending Account claim form for reimbursement.
• Dependent Care Spending Account claim form for reimbursement.

If you have questions on the enclosed material, please contact us.

FBA NATIONAL
100 QUENTIN ROOSEVELT BLVD, SUITE 403
GARDEN CITY, NY 11530
PHONE: (855) 374-6431 FAX: (833) 930-1024
WWW.FBANATIONAL.COM
October 1, 2019

Re: FBA of Syosset New Website Address and Fax Number

Dear Member:

Please be advised as of July 1, 2019 FBA OF Syosset has a new website address www.fbanational.com.

Some search results for www.fbaofsyosset.com will result in a "not found" error until the results are updated by the search engines. For the time being, please navigate to our updated website by typing www.fbanational.com directly into the search bar of a mobile or desktop browser.

If you were previously registered on our website (FBA of Syosset.com) your user name and passwords are still valid. If you are a first-time user you must register by clicking on "Log In/Register and follow the registration instructions.

As of September 1, 2019, our new fax number for claims submission or correspondence will be (833) 930-1024.

The current fax number (888) 371-3151 will no longer be in service after September 1, 2019.

Please refer to our new website, www.fbanational.com for the updated Flexible Spending Healthcare and Daycare claims forms for reimbursement with the new fax number and our current mailing address.

Please contact our customer service department at (855) 374-6431 with any questions or concerns you may have.
RHINEBECK CSD /FSA
ONLINE FSA ACCESS: 24/7/365 Access & Management

This will allow you access to your current claims paid and account balances on our system for Flexible Spending (Section 125 Plan) for the 2020 Flexible Spending Plan Year.

Please note: FBA website address has changed
Website: www.fbanational.com if you were previously registered on our www.fbaofsynosset.com website your user name and password are still valid. If you are a first-time user please see the below registration instructions.

Register for the 2020 Flexible Spending Plan: Registration ID FBARHINEBECK
Important: To register with this site, you must use your Social Security Number as your Employer ID number and a Registration ID or your Benefit Debit Card Number.

Accessing Your Account Online
Once your enrollment is received and entered into the system you will be able to access your account information on-line:

1. Go to www.fbanational.com
2. Click on “Employee” and then “Register”.
3. Set up your username and password.
4. Note that your username must be 6-12 characters and alphanumeric.
5. Note that your password must be at least 8 characters long, cannot have the same character repeated three times in a row and must include at least three of the following: capital letter, lower case letter, number or one special character (., ! @ etc.).
6. Enter in the information requested. You will need the following information:
   - Your Employee ID is your Social Security Number (no dashes), unless your employer uses a different type of employee identifying number. Your Registration ID is your Card Number (the Card Number option can be selected using the dropdown box).
   - You then must click on the link to "View Terms of Use" and it will bring up a separate page, after reviewing, mark the box to accept the terms and then click “Register.”

FBA NATIONAL
100 Quentin Roosevelt Blvd Ste 403
Garden City, New York 11530
Phone: (855) 374-6431
Fax: (833) 930-1024
www.fbanational.com
RHINEBECK CSD/FSA
The easy way to access all of your benefits.

It is that time of year again for the Open Enrollment Period for the Flexible Spending Plan. If you wish to participate in the Flexible Spending Plan enrollment will begin **1-1-2020**. You must re-enroll in the flexible spending account for medical and/or dependent care. This benefit does not roll over and your benefit will be cancelled if you do not re-enroll.

Please DO NOT discard your current Benefit Debit Card.

If you choose to re-enroll for the upcoming plan year January 01, 2020 through December 31, 2020 your benefit debit card will be replenished with the dollar amount that you have elected for the January 01, 2020 through December 31, 2020 Plan Year.

If you are enrolling for the first time, your Benefit Debit Card will be mailed to your address that you have provided on your Rhinebeck CSD enrollment form.

How long is my card valid?

As long as you do not have a break in participation, you can use your card for multiple years, until the expiration date printed on it. If you are still a participant when your card expires, a new card will be automatically mail to you.

Below you will find information in regards to the roll out of the Benefit Debit Card. Remember if you choose not to use the Debit Card you must file a hard copy claim with the necessary documentation to receive your reimbursement.

Access to Funds
Your benefit debit card gives you easy access to the funds in your tax-advantaged benefit account by swiping the card at the point of sale. The card can be used at any qualified service provider that accepts MasterCard. Funds are automatically transferred from the benefit account directly to qualified providers with no out-of-pocket cost and no need to file a claim for reimbursement.

Your benefits debit card virtually eliminates:
- Out-of-pocket expenses
- Claim forms
- Reimbursement checks

Your benefits debit card is as easy as 1-2-3

1. Check your account balance
   You can view your transaction history, current balance, claim status, and more by logging in online at: www.fbanational.com- click on “Log In/Register”. Please contact FBA of Syosset, LLC at: (855) 374-6431 for any questions in regards to creating a new account for your card

2. Swipe your benefit debit card
   Swipe the card at the point-of-sale for eligible products and services. IRS rules and regulations still apply. Most major retail chains utilize a system that will auto-substantiate the purchase, meaning it will approve eligible expenses without requiring submission of receipts. If a purchase is greater than your account balance, you can split the cost at the register or you may submit a manual claim.

3. Keep all your receipts
   Though the need for documentation is greatly reduced, it is a good practice to save your receipts in the rare instance documentation is requested by your administrator or in case of an IRS audit.
Eligible Health Care Expenses- See IRS Publication 502)
Eligible medical care expenses include amounts paid for the diagnosis, cure, mitigation, treatment or prevention of disease, and for treatments affecting any part or function of the body. The expenses must be primarily to alleviate or prevent a physical or mental defect or illness. Expenses for solely cosmetic reasons generally are not expenses for medical care and may not be eligible. Expenses that are merely beneficial to one’s general health are not expenses for medical care. In some cases, you may be asked to provide a letter of medical necessity from your attending physician to substantiate your claim.

This list has been compiled for the convenience of our clients and participants and is designed to provide a general overview. Readers are cautioned to review their own employer-sponsored benefit plan descriptions and enrollment material for specific information or to consult with their employer or personal tax advisor as necessary. This information is subject to change at any time and without notice.

Acupuncture
Alcoholism treatment
Allergy treatments - prescription medications and allergy shots
Alternative healers, professional fees of
Ambulance service
Artificial insemination
Artificial limb/teeth
Autoette (wheelchair)
Automobile modifications (if medically necessary)
Battery-powered toothbrush (if medically necessary and prescribed by physician)
Birth control pills (Norplant, ovulation
Blood pressure monitoring devices
Body scans for diagnostic purposes
Bone density testing
Braille books and magazines
Capital expenditures- See IRS Publication 502) - Capital Expenses [Only a qualified financial or tax consultant can make an absolute determination with regard to the qualification of capital expenditures])
Childbirth expenses (physician, midwife)
Chiropractor professional fees
Cholesterol testing
Christian Science Practitioner fees
Co-insurance, co-pay amounts and deductibles
Contact lenses and cleaning solutions
Contraceptives (birth control pills, condoms, spermicides)
Cosmetic surgery and procedures to correct congenital abnormality or treat injury resulting from accident
Counseling (for treatment of specific medical condition)
Crutches
Deductibles
Dental treatment (includes exams, x-rays, fillings, root canals, gum disease treatment, crowns, bridges, dentures, implants, orthodontia; does not include cosmetic treatments such as teeth whitening, dental veneers, bonding, etc.)
Diabetic supplies (insulin, syringes, testing strips, glucometers)
Diagnostic services and tests
Diapers (if required due to medical condition)
Doula services- If the doula is a licensed health care professional who renders medical care, his or her fees can be reimbursed
Drug dependency treatments
Drugs (prescription drugs, insulin; does not include cosmetic drugs (e.g., Retin-A, over-the-counter acne products, etc. unless, you have a prescription for that item written by your physician).
Dyslexia treatment
Eye surgery (cataract, LASIK, corneal rings, etc.)
Eyeglasses, prescription (includes prescription sunglasses; also includes over-the-counter reading glasses)
Eye examinations
Fertility treatments (in vitro fertilization, surgery or operations to reverse a prior surgery that prevents you from having children)
Flu shots
Fluoridation device (if medically necessary & prescribed by physician)
Genetic testing
Guide dog or other animal used to assist persons with physical disabilities
Health institute
Health screening (cholesterol checks, bone density testing, blood pressure testing, hearing exams)
Hearing aids and batteries
Home health care
Hospital services
Immunizations
Inclinator
Infertility treatments
Insulin and syringes
Laboratory fees
Lactation Consultants
Language training for child with dyslexia or disabled child
Laser eye surgery (cataract, LASIK, corneal rings, etc.)
Lead-based paint removal
Learning disability caused by mental or physical impairment, or nervous system disorders (treatment must be recommended by physician – See IRS Publication 502) - Learning Disability
Legal fees (fees you pay that are necessary to authorize treatment for mental illness)
Lodging - See IRS Publication 502 - Lodging
Long-term care services
Massage Therapy medically necessary to treat a specific injury or illness
Mastectomy-related special bras (the cost over & above the cost of a normal bra)
Meals (only as part of inpatient hospital care)
Medic-alert bracelet
Medical conference admission and transportation to/from (if concerns chronic medical condition of you, spouse or child)
Medical equipment (crutches, wheelchairs, walkers)
Medical information plan
Medical monitoring and testing devices
Medical records charges
Medical services provided by physicians, surgeons, specialists or other medical practitioners
Medical Supplies (bandages, band-aids, gauze pads, thermometers, hot/cold packs, heating pads, nasal (breathe-right) strips, etc.)
Medicines/Drugs (prescription drugs, or insulin; does not include cosmetic drugs)
Mentally handicapped, special home for person adjusting from life in mental institution to community living
Norplant insertion and removal
Nursing home (if necessary for medical care and only the portion for medical services)
Nursing services
Nutritionist’s professional expenses (if treating a specific medical condition; not for weight loss for general health)
Obstetrical expenses
Occlusal guards to prevent teeth grinding
Operations (legal operations that are not cosmetic in nature)
Optometrist fees
Oral surgery
Orthodontia
Orthopedic devices
Orthopedic shoes (to the extent the cost exceeds that of normal shoes)
Osteopath fees
Ovulation monitor
Oxygen
Patterning exercises
Physical exams, routine physicals
Physical therapy
Physician’s fees
Pregnancy test, over-the-counter
Prescription drugs (does not include cosmetic drugs)
Prescription eyeglasses or prescription sunglasses
Prosthesis
Psychiatric care
Psychoanalysis
Psychologist fees
Radial keratotomy (corrective eye surgery)
Reading glasses (prescription glasses or over-the-counter glasses)
Reconstructive surgery following mastectomy
Schools and education, special (for mentally impaired or physically disabled person – See IRS Publication 502)
Sick-child care facility (for medical care only)
Sleep disorder and treatment
Speech therapy
Sterilization procedures (vasectomy or tubal ligation)
Stop-smoking programs (including hypnosis)
Storage fees for embryo or sperm (fees for temporary storage of eggs or sperm only to extent used for immediate conception in current plan year)
Storage fees for umbilical cord blood (fees for temporary storage only to extent used for medical condition in current plan year)
Sunscreen with SPF 15 or higher
Sunglasses (only if medically required due to specific medical condition & obtained at direction of physician)
Surgical fees (for legal operations not cosmetic in nature)
Taxes charged for medical services and products
Telephone consultations with a health care provider
Telephone or Television for hearing-impaired persons, special equipment for
Therapy, physical or speech
Transplants (donor expenses, if you pay those expenses)
Transportation and related travel expenses for person seeking treatment- See IRS Publication 502) Transportation and Trips
Usual and customary, charges in excess of
Vaccines, vaccinations
Vasectomy
Vitamins (only by prescription and only if necessary to treat a specific medical condition)
Weight-loss program (only if medically necessary to treat existing disease (such as heart disease) and undertaken under physician’s direction)
Wheelchair
Wigs (if purchased upon advice of physician for mental health of patient)
X-ray fees

Ineligible Health Care Expenses (See IRS Publication 502)
Adoption fees
Baby-sitting, childcare or nursing services for a healthy baby
Breast pump
Chairs, recliner
Childbirth expenses (Lamaze or childbirth classes, doula services)
Cold Medicine (over-the-counter drugs including sore throat sprays, lozenges, nasal sprays, cough syrups, cough drops and vapor rubs.) unless, you have a prescription for that item written by your physician.
Concierge Fees, A/V/A Boutique, Practice, VIP or Retention Fees are not considered an eligible expense since the fee is paid regardless if medical care is needed.
Completing claim forms
Controlled substances (marijuana, laetrile, etc.)
Cord blood storage for future use
Cosmetic surgery or procedures; cosmetic prescription drugs such as Renova, Propecia, etc and over-the-counter cosmetic drugs/medicines.
Counseling (marriage, family counseling)
Dancing lessons
Dental veneers or bonding, or teeth whitening for cosmetic reasons
Diaper service
Divorce expenses
Domestic help
Doula services
Ear piercing
Electrolysis or hair removal
Exercise equipment for general health
Exercise/Fitness programs for general health Expenses that have been reimbursed elsewhere, or that may be reimbursable under any other source
Expenses not incurred during your period of coverage
Facelifts or other similar cosmetic treatments (dermabrasion, chemical peels, etc.)
Funeral expenses
Hair transplant
Health club membership dues
Herbal supplements (dietary and nutritional supplements, vitamins, natural medicines, etc.)
Household help
Illegal operations and treatments
Insurance premiums
Laetrile
Lamaze/Childbirth classes
Lifetime care fees
Liposuction or other similar cosmetic treatments
Marriage, family counseling
Marijuana
Maternity clothes
Mattress
Meals while traveling to obtain medical care
Medical newsletters
Medical savings account
Over-the-counter Drugs/Medicines (allergy medicines, antacids, anti-diarrhea, anti-fungal ointments and creams, antiseptic ointments and creams, cold medicines including sore throat sprays, lozenges, nasal sprays, cough syrups, cough drops, vapor rubs, eye drops, first-aid and antibiotic creams and ointments, gas relief medicines, hemorrhoid ointments and creams, laxatives, lice treatments, motion-sickness pills, pain relievers including arthritis pain, headache pain and menstrual pain, sleep aids, stop smoking gums/patches, yeast infection products; includes cosmetic items, vitamins, herbal and dietary supplements or items for general good health) unless, you have a prescription for that item written by your physician.
"No Show" doctor or dentist visits, charges for
Nursing services for health baby
Nutritional supplements (vitamins, herbal and dietary supplements, natural medicines, etc.)
Pain Relievers (for arthritis pain, headache pain, menstrual pain, muscle or joint pain, e.g., aspirin, ibuprofen; includes vitamins or herbal supplements) unless, you have a prescription for that item written by your physician.
Paternity testing
Personal use items (items ordinarily used for personal, living or family purposes)
Prepayment for services not yet provided
Prescription drug discount programs
Recliner chair
Safety glasses
Stop-smoking (gums and patches) unless, you have a prescription for that item written by your physician.
Storage fees for embryo, sperm or umbilical cord blood, long term
Student health fees
Sunglasses, clip on
Surrogate expenses
Swimming lessons
Tanning salons and equipment
Tattoo removal
Teeth bleaching/whitening for cosmetic purposes
Tax Equity and Fiscal Responsibility Act (TEFRA)
Vacuum cleaner for allergies
Varicose veins, treatment of
Vision service agreements or lens replacement insurance
Warranties/service contracts
Weight loss programs for general health or appearance; diet foods for weight loss

**Eligible Dependent Care Expenses (See IRS Publication 503)**

To be eligible for favorable tax treatment, childcare expenses must be "employment related expenses," as defined under IRC Sec. 21(b)(2), related to expenses for household and dependent care services that are necessary in order for the taxpayer to be gainfully employed. In a married couple house hold, both spouses must be gainfully employed and working during the hours of the dependent daycare services is provided. A child is eligible for daycare services up to the age 13.

Before and after school or extended day programs (supervised activities after the regular school program)
Au pair expenses for dependent care (does not include travel expenses)
Babysitter inside or outside household-(you must include the providers SSN or TIN with your claim)
Custodial childcare or eldercare expenses for qualifying individual
Day camps, if primary reason for being there is the care and well-being of the child and is custodial in nature and not educational (Both parents must be working during the hours the child/children are attending camp)
Daycare centers
FICA and FUTA taxes of daycare provider
Household employee whose services include care of a qualifying person
Looking for work-expenses incurred to enable employee to look for work
Nanny expenses
Preschool/Nursery school for pre-kindergarten
Sick-child care center to extent the care is not for medical services
Work-related day care expenses - must allow you to work or look for work. You must be gainfully employed (earning income). This does not include volunteer work that is unpaid or for nominal pay

Ineligible Dependent Care Expenses (See IRS Publication 503)
Educational/tuition expenses - kindergarten, first grade and above
Expenses paid to child of participant
Field trip expenses
Food, clothing, education or entertainment expenses
Household services (chauffeur, bartender, gardener)
Incidental expenses (diaper, activities, etc. charges)
Overnight camp (not even the portion attributed to the daytime cost)
Payments for care where you are not the custodial parent (in divorce situations)
Payments for care while you are off work because you are on a leave of absence
Payments for care while you are off work because you are on maternity or other medical leave
Payments for care while you are off work because you are on vacation
Payments for care while you are off work due to illness
Payment for services not yet provided (advance payments)
Registration fees/reservation fees/holding fees
Transportation expenses
GUIDELINES FOR SUBMISSION OF SECTION 125 CLAIMS

These guidelines are intended to aid you in filing claims though Section 125 Plan for reimbursement. They will assist you in receiving a quick reimbursement and avoiding an unnecessary returns or requests. You may fax your claim to our New Flex Fax Number (833) 930-1023.

Necessary items to include in your packet of Section 125:

1. Fully completed claim form (health or dependent care reimbursement form). These can be obtained through your department of human resources or by calling our office at (855) 374-6431.
2. Explanation of benefits from either your medical or dental insurance. This is the paper that is attached to your insurance payment. This can also be obtained from your individual medical or dental care giver. Most medical and dental insurance will send you and your primary care provider a copy of the benefits. The E.O.B. contains all the information needed to process your out of pocket expenses (i.e.: name of patient, date of service, name of doctor). If your insurance does not cover a particular procedure or the fee has been applied to your deductible, we must have the denial or the statement stating such facts (an itemized bill stating these facts is NOT ACCEPTABLE). If you do not have or cannot obtain an E.O.B. for co payments reimbursement, then you must submit the following:

   A. An itemized bill from the primary care provider giving details of all services that were rendered to total the amount being submitted in for reimbursement. This bill must list the dates of services, the procedures performed, names of patient, name of doctor AND any insurance payments that were made on the account. Without this information, an itemized bill is NOT ACCEPTABLE. “Balance Forward” and “Previous Balance” statements are NOT ACCEPTABLE. If you DO NOT have insurance, this also must be stated on the itemized bill.

   B. Written receipts from a doctor’s office are acceptable as long as the actual date of service (not the date you paid), the name of the patient and the name of the doctor is clearly printed on the receipt, These receipts can only be the usual co payment amount that you would normally pay for your visit (i.e. $10, $15, or $20). If it is an out of the norm amount, then either an itemized bill or an E.O.B. is necessary to ensure reimbursement.
Cancelled checks or bank statements are also NOT ACCEPTABLE; they do not specify the information needed to properly process your claim.

Predeterminations of Benefits are NOT ACCEPTABLE for reimbursement under the Flexible spending account program. A predetermination of benefits is an estimate of payment prior to services being performed. Reimbursement can only be given for date of services that were actually performed.

C. Prescription: If you are submitting receipts for pharmacy co-pays, please send in the pharmacy receipts that you receive attached to the prescription. These receipts detail the name of patient, date when the prescription was filled; co-payment amount and prescription number that we need to process the claim. Register receipts are only acceptable for the purchase of over the counter drugs. The cash register receipt must have the name of the OTC drug and the date of service along with the physician prescription. If you cannot collect all these receipts or you may not have saved them, your pharmacist can print out a list of your entire family’s history of prescriptions for that particular year. Privacy may be a concern; therefore, you may block out any names for medication to ensure your privacy.

Sending in a complete and clearly legible claim to our office will ensure a quick reimbursement. As always, we are happy to assist you in any matters or concerns that you may have. Please contact us at (855) 374-6431.
HEALTH CARE SPENDING ACCOUNT
Claim for Reimbursement

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<th>CITY</th>
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HEALTH CARE EXPENSES

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<th>(B) AMOUNT PAID BY OTHER SOURCES</th>
<th>(A-B) AMOUNT TO BE REIMBURSED</th>
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TOTALS

CERTIFICATION
I certify that the expenses for which I am requesting reimbursement meet all of the conditions listed below:
- They were incurred for services or supplies received by me or my eligible dependents under the plan.
- They were for services or supplies furnished while I was a participant in the Plan.
- I have not been reimbursed for these expenses, and they are not reimbursable from any other health plan.

I understand that reimbursement of these expenses can be requested and made only after I have collected all benefit payments available from all plans under which my eligible dependents and I are covered. I further certify that I have not deducted nor will deduct on my individual income tax return any of the expenses reimbursed through my Health Care Spending Account.

I understand that reimbursement will be made in accordance with the provisions of the plan which I participate. I accept responsibility for the proper treatment of benefits paid under this plan with respect to eligibility, income tax reporting, and liability.

COMPLETION OF 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.
- You must sign and date claim form.
- A copy of a bill or other written statement from the provider of service is acceptable only when NO other insurance is applicable.
- Cancelled Checks/Credit Card Statements are NOT acceptable.
- If insurance is applicable, a statement/explanation of benefits from ALL MEDICAL/DENTAL INSURANCE CARRIERS SHOWING DEDUCTIBLE, COPAYMENTS AND PAYMENTS IS REQUIRED.

EMPLOYEE SIGNATURE_________________________ DATE_____________

MAIL COMPLETED FORM TO:
FBA OF SYOSSET, LLC
100 QUENTIN ROOSEVELT BLVD, SUITE 403
GARDEN CITY, NY 11530
PHONE (855) 374-6431 FAX (633) 930-1024
www.fbanational.com
DEPENDENT CARE SPENDING ACCOUNT
CLAIM FOR REIMBURSEMENT

Name of Employer

Employee Name _____________________________ Social Security __________________

Employee Address ________________________________________________________________

Street
City
State Zip

Dependent Name Date of Birth Relationship to Employee
______________________________________ ___________________________ ___________________________
______________________________________ ___________________________ ___________________________
______________________________________ ___________________________ ___________________________

Please complete the information below and attach corresponding bills or receipts with dates of service for each listed provider.

Name: ___________________________ Name: ___________________________

Address: ___________________________ Address: ___________________________

______________________________________ ___________________________

Tax I.D. or Soc. Sec. # Tax I.D. or Soc. Sec. #
______________________________________ ___________________________

Dates of Service: ______ to ______ Dates of Service: ______ to ______

If dependent care was provided in your home, complete the following:
Household Services Relating To The Care Of A Qualifying Individual(s) $ ___________
FICA And FUTA Taxes on Wages Paid To A Housekeeper $ ___________
Room And Board Expenses Incurred Outside The Home For A Housekeeper $ ___________
Transportation Expenses Of A Housekeeper $ ___________
Other (please list) $ ___________
$ ___________
$ ___________

If your eligible expenses were incurred outside of your home, complete the following:
Services Related To The Care Of Qualified Individual(s) And Incurred in A Day Care Provider’s Home/Day Care Center $ ___________

TOTAL DEPENDENT CARE REIMBURSEMENT REQUESTED: $ ___________

CERTIFICATION
I certify that I and/or my eligible dependents have incurred the expenses for which reimbursement is claimed from the Flexible Spending Account. I further declare that I have not and will not deduct these expenses on my Individual Income Tax Returns. I certify that the above eligible expenses have been (or will be) paid for the care of a qualified individual(s).
EMPLOYEE SIGNATURE ___________________________ DATE ___________

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GARDEN CITY, NY 11530

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