

# FLEX CLAIM FORM

You must complete, sign, date, and submit a claim form with each batch of receipts submitted.

Employer \_\_\_\_\_ Submitted for Plan Year \_\_\_\_/\_\_\_\_/\_\_\_\_ - \_\_\_\_/\_\_\_\_/\_\_\_\_

Employee \_\_\_\_\_ SSN XXX/XX/\_\_\_\_

Phone # \_\_\_\_\_ Email Address \_\_\_\_\_

Check here and complete below **ONLY** if this is a new address.

Number/Street

City

State

Zip

## **Premium Reimbursement** (Individual Health Insurance Policy Premium)

Paid Receipt attached for the following months premium

Dollar amount of reimbursement requested: \$ \_\_\_\_\_

## **Non-reimbursed Medical Expenses**

Please initial here if the receipts you are submitting with this claim form have not been reimbursed or will not be reimbursed under any other health plan coverage (true out-of-pocket expense) \_\_\_\_\_. Your initials here, plus your signature at the bottom of this claim form, will allow us to reimburse your claim without an Explanation of Benefit.

# of Non-reimbursed receipts submitted \_\_\_\_\_ Total \$ amount of receipts submitted \$ \_\_\_\_\_

**Dependent Daycare Expenses** Attach a copy of your receipt to a completed claim form **OR** have the dependent daycare provider complete and sign below (original signature required).

Dependent's name \_\_\_\_\_ Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_

Dependent Daycare Provider \_\_\_\_\_ Tax ID or SSN \_\_\_\_\_

Date of Service \_\_\_\_/\_\_\_\_/\_\_\_\_ through \_\_\_\_/\_\_\_\_/\_\_\_\_ Amount \$ \_\_\_\_\_

Dependent Daycare Provider Signature

Date

# of Dependent Daycare receipts submitted \_\_\_\_\_ Total \$ amount of receipts submitted \$ \_\_\_\_\_

*I hereby certify that all expenses for which reimbursement or payment is claimed by submission of this form were incurred during a period while I was covered under the Company's Cafeteria Plan with respect to such expenses and that the medical expenses have not been reimbursed and will not be reimbursed under any other health plan coverage. I further certify that such items will not be deducted or taken as tax credits on my personal federal and state income tax returns for any year. I fully understand that I am responsible for the sufficiency, accuracy, and veracity of all information relating to this claim which is provided by me, and that unless an expense for which payment or reimbursement is claimed is a proper expense under the Plan, I may be liable for payment of all related taxes including federal, state, or local income tax on amounts paid from the Plan which relate to such expense.*

Employee's Signature

Date

Submit claim form with receipts to:

**Innovative Employee Benefits, Inc.**

PO Box 470257

Charlotte, NC 28247

Phone: 704-341-5981 TF 866-541-5981 Fax: 704-341-5984 TF 866-541-5984