

**WHITE RIVER VALLEY SUPERVISORY UNION
SECTION 125 CAFETERIA PLAN
Health Care Expense Claim Form**

| | | |
|---|--|-------------------|
| Name (last, first, MI) | | Social Security # |
| School District | | Date |
| <p>The undersigned Participant in the Plan requests reimbursement in the amount shown below (please list individually on the reverse side):</p> <p align="center"><i>Due to changes under the "Patient Protection and Affordable Care Act," over-the-counter (OTC) benefits are limited to Doctors' Prescriptions only</i></p> <p>Please attach the following documentation for each expense (do not send cancelled checks or credit card receipts/statements as they are not considered acceptable evidence):</p> <ul style="list-style-type: none"> • Services or products covered by any other benefit plan (i.e., health insurance plan): Explanation of Benefits Statement (EOB), or • Services or products NOT covered by any other benefit plan: invoices or receipts which indicate the name and address of the service provider, name of employee or dependent for whom the service was provided, date of service, type of service or product provided and amount of expense. <i>Prescription drugs require the receipt from the pharmacist (a cash register receipt is not sufficient). Over-the-counter (OTC) drugs (with a Doctor's prescription and purchased for medical purposes) require an invoice or receipt (a cash register receipt is sufficient with the drug(s) and/or items identified.</i> <p>Total Amount of Medical Expenses (from page 2 of this form): \$ _____</p> | | |
| IM P O R T A N T | <p>The undersigned participant in the plan certifies that all expenses for which reimbursement or payment are claimed by submission of this form, were incurred during a period in which the undersigned was covered under the White River Valley Supervisory Union Section 125 Cafeteria Plan with respect to such expenses and that such 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 the payment of all related taxes including federal, state or city income tax on amounts paid from the plan which relate to such expense. The undersigned further understands that no medical expense tax deduction is permitted for amounts for which reimbursement is made. Furthermore, the undersigned agrees that any amounts paid which are in excess of his or her current account balance will be considered a loan and will be owed to the Plan in the event he or she terminates employment (for any reason) prior to the completion of the current Plan Year.</p> | |
| | Participant's Signature | Date |

Please return completed form to: Future Planning Associates, Inc.
 ATTN: White River Valley SU Administrator
 P.O. Box 905
 Williston, Vermont 05495-0905
 Phone: (802) 857-0685; scan and e-mail: belinda@futureplanningassoc.com
FAX: 802/857-0705 – If scanning or faxing this request, to avoid duplication, **DO NOT** mail.

**This form must reach Future Planning Associates by the 2nd or 4th Tuesday each month
 · Disbursements are paid the following week ·**

End of Plan Year claims for expenses incurred on or before December 31st must be submitted by January 30th.

