

Continual Reimbursement Request

Orthodontia and Dependent Care Expenses

Please send completed form and required documentation to National Benefit Services.



1 Personal Information

Employee Name (First Name, Last Name)

Employee Social Security Number (Required)

Employee Street Address, City, State, Zip Code

Name of Person Receiving Service

Employer Name

Employee Email Address

2 Orthodontia Instructions

- Complete the Orthodontic Expense Worksheet (Option 2a) below and sign option 3.
- Please attach the Orthodontic Treatment and Financial Agreement (Required).** Your orthodontic provider's information and signature is required for reimbursement.
- You are responsible for retaining your previous year receipts for reimbursement. Please submit your receipts yearly in order to continue participating in the continual reimbursement program.

2a Orthodontic Expense Worksheet

\$ _____	\$ _____	<input type="checkbox"/> No Insurance	\$ _____	_____
Total treatment fee	Expected insurance coverage	Coverage	Initial payment (If any)	Date paid
\$ _____	_____	\$ _____	_____	_____
Ortho records/model fee (If separate from treatment fee)	Date paid	Patients monthly payment (after expected insurance)	_____	Date of First Payment
_____	\$ _____	<input type="checkbox"/> Orthodontic Treatment and Financial Agreement attached?		
Expected # of months in treatment	Amount of last payment			

3 Dependent Care Instructions

- Complete the Dependent Care Deduction Worksheet (option 2b) below and sign option 3.
- Determine the Total Annual Expense election for dependent care expenses
 - Enter Total Annual Expense for dependent care. **Annual Expense may not exceed \$5,000 (per household) and \$2,500 (if filing individual tax return(s))**
 - Divide Total Annual Expense by the number of pay periods to calculate your pay period deduction. Each pay period's funds will continue to be dispersed immediately after each payroll is submitted to National Benefit Services by your employer.
- You are responsible for retaining your receipts for reimbursement. Please submit your receipts yearly in order to continue participating in the continual reimbursement program.

2b Dependent Care Deduction Worksheet

\$ _____	÷	_____	=	\$ _____
Total annual election amount		Number of pay periods		Pay period deduction

Continual Reimbursement

Expenses for orthodontia/dependent care may not be reimbursed under the plan prior to the time the services are rendered. However, you may be reimbursed under the plan after the services are rendered and prior to the time that the payment is due if those expenses are part of a continual reimbursement request. You may use this form to apply for continual reimbursement. No reimbursement may be paid under the continual reimbursement program for any month in which services are not rendered. It is your responsibility to advise the plan administrator of the cessation or interruption of such services.

3 Employee Signature

I have reviewed the information on this request form and verify that the information listed above and attached is true and correct. I understand that if any changes regarding the continual payment occur, the company must be notified immediately. Failure to do so could result in additional taxes being applicable for which I would be responsible. I also understand that I am responsible for retaining copies of receipts for payment of these expenses, and they must be forwarded to National Benefit Services, LLC each year along with this form to continue participating in the continual reimbursement program.

Employee Signature

Date