

YOUR spending ACCOUNT™

P.O. Box 785040
Orlando, FL 32878-5040
Fax: 1-888-211-9900

Education Reimbursement Form Yale University (05102)

Education Information

Course Number and Name

Start Date (MM/DD/YYYY)

 / /

Completion Date (MM/DD/YYYY)

 / /

Course Grade

(For Pass/Fail, enter P or F) Is course job related?

Yes

No

Credit Hours

Institution

Program Type (Mark an "X" in one box below.)

Associate Bachelor's Master's Single Course

Provider

Expense Type

Insert the appropriate letter:
T = Tuition **B** = Books **S** = Supplies
A = Admin Fees **L** = Library Fees

Date of Expense (MM/DD/YYYY)

 / /

Expense Amount

\$.

Grant or Scholarship Amount

\$.

Employee Certification (Required)

Employee Signature

Date



Employee Certification (Continued)

By adding my signature on the first page, I certify that the information I'm providing is correct and the expenses for which I'm requesting reimbursement, or for which I'm validating:

- Were incurred for services or supplies received by my eligible dependents or me under the plan;
- Were for services or supplies furnished on or after the date my spending account takes effect;
- Haven't been reimbursed in any other way or from any other source and won't be submitted for future reimbursement; and
- Don't include any amounts that are otherwise payable by plans for which my dependents or I are eligible.

Education Reimbursement Instructions

To have your reimbursement request approved, you must sign the enclosed form and fax or mail your claim to Your Spending Account with the required documentation. Once received, Your Spending Account will typically process your reimbursement request within ten days.

Documentation You'll Need to Provide

You must provide proper supporting documentation so that your reimbursement request can be approved. This includes a signed and dated reimbursement request form and copies of receipts or other documentation, such as an itemized invoice from an educational institution.

An itemized receipt must include the following:

- Date of expense;
- Educational institution or merchant;
- Description of expense; and
- Amount paid.

If you have an educational grant, student loan, or scholarship, proof of any amount paid by that other coverage is necessary when submitting a reimbursement request to Your Spending Account.

Remember to save your original receipts and other documentation for your records. Visit the Your Spending Account Web site for more information about documentation requirements.

If you've lost a receipt, contact your educational institution to request a copy. If you don't provide the necessary information, the processing of your reimbursement request may be delayed.

Sending Your Reimbursement Request to Your Spending Account

Send this form and your documentation to Your Spending Account by fax or mail.

Fax: 1-888-211-9900

Mail: Your Spending Account
P.O. Box 785040
Orlando, FL 32878-5040

If faxing, be sure to place the form before your itemized receipts and don't include a cover letter.