

## FORM 2.6.3 FLEXIBLE SPENDING PLAN (FSP) CLAIM FORM

**EMPLOYEE SECTION** \*\*Yearly Maximum (per calendar year): \$500.00

NAME: \_\_\_\_\_ DATE: \_\_\_\_\_

List Category (with details) for this claim

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Amount of claim     \$ \_\_\_\_\_

All original receipts attached ☐

Signature \_\_\_\_\_

## MANAGEMENT SECTION

Unused portion carried from previous year     \$ \_\_\_\_\_

Total amount available in current year  
(Including unused portion from previous year)     \$ \_\_\_\_\_

Amount of current claim     \$ \_\_\_\_\_     Approved    Y    N

Total of previous claims this benefit year \$ \_\_\_\_\_

Balance remaining     \$ \_\_\_\_\_

Date submitted to payroll \_\_\_\_\_

Management Signature \_\_\_\_\_

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## 2.6.3 FLEXIBLE SPENDING PLAN (FSP) CLAIM FORM

### Categories eligible under the Flexible Spending Plan (FSP).

Health, Dental, and Vision expenses such as but not limited to the following:

- Any unpaid amounts for dental procedures not covered under core benefits and in accordance with the *Income Tax Act*.
- Any unpaid amounts for health procedures not covered under core benefits.
- Lifeline monitoring systems / medic alert bracelet/neck chain.
- Massage / Spa therapy.
- Physiotherapy / Chiropractor / Acupuncture / Holistic medicine.
- Eyeglasses / eye exams.

Care / Long term Care expenses such as, but not limited to, the following:

- Private childcare or daycare centers / Nanny;
- Child camps including day camps or overnight camps.
- Adult / Elder.
- Retirement homes/ Nursing home expenses, i.e.: laundry, hairdressing, etc.
- Meals on Wheels.

Fitness expenses such as, but not limited to, the following:

- Health / gym club membership.
- Classes, i.e.: yoga, Pilates, aerobics, Curves, Good Life, etc.;
- Fitness equipment, i.e.: treadmill, Bowflex, exercise bike, etc.
- Personal trainer / Self-defense courses.
- Wii fit or similar game system.
- Sport registration fees / team fees / passes.
- Dance lessons / Swimming lessons (including water aerobics classes).

Counselling / Education expenses such as, but not limited to, the following:

- Grief / Addiction counseling.
- Organized weight loss programs, i.e.: Jenny Craig, Weight Watchers, etc.
- Stress management / smoking cessation programs.
- Professional courses – Must be offered by authorized accreditation institution (U of A, NAIT, etc.);
- Professional books / Professional membership fees and dues.
- First Aid Courses.
- Travel costs (bus, air, train, car rental, etc.).

a. Financial expenses such as:

- RRSP / TFSA / RESP.