





# RHS PLAN EMPLOYEE BENEFIT ELIGIBILITY FORM INSTRUCTIONS

Once your employer has indicated you are eligible for benefits and you submit this completed form, you will be able to request payment for benefits covered by your employer's RHS plan. This form is used by the claims administrator (Meritain Health, Inc.) to set up your account and process claims.

In order for us to efficiently process your benefits, you must fully complete this form and submit it to Meritain Health, Inc. Please be sure to keep a copy of all forms and documentation you submit for your records. Accuracy and completeness of the information you submit will expedite your claims.

After a claim you have submitted has been processed, always review your Explanation of Benefits from Meritain Health, Inc. to confirm the accuracy of your benefit eligibility and enrollment information. If you discover a discrepancy, contact Meritain Health, Inc. at 1-888-587-9441 as soon as possible.

## INSTRUCTIONS:

### 1. Participant Information

Please complete this section carefully. The information will be used to set up your account for benefit payments. You will receive your reimbursements and Explanations of Benefits at the address you list. The employer plan number is available from your employer or ICMA-RC's Investor Services staff at 1-800-669-7400.

### 2. Spouse and Dependent Information

This section tells us on whose behalf medical claims may be submitted. Dependents consist of your spouse\* **and** those who **meet each of the following three criteria:**

A. The person is related to you OR lived with

you for the entire year as a member of your household; and

B. The person was a U.S. citizen or resident (or resident of Canada or Mexico) for some part of the calendar year; and

C. You provided over half of the person's total support for the year.

See IRS Publication 502, Medical and Dental Expenses, for more information.

For your spouse and each dependent, please indicate the full name, Social Security Number, birth date and relationship to you.

*\* Important Information for California Participants: Under current California law, a domestic partner may be treated as a spouse for certain welfare plan purposes. This means that the RHS account can be used to reimburse medical expenses of a domestic partner on a tax-free basis during the life and after the death of the RHS participant. A domestic partner may be listed as a spouse on this RHS Employee Benefit Eligibility Form. A copy of the Declaration of Domestic Relationship must be attached to the form.*

If you need to add or delete eligible spouse or dependents, contact Meritain Health, Inc. at 1-888-587-9441.

### 3. Participant's Signature

Once you have completed this form, sign it, retain a copy for your records and submit it to Meritain Health, Inc.

Your signature on the form certifies that all information provided is accurate, and that all dependents meet the IRS criteria outlined in the instructions for Section 2.

*Please Note: Your employer must also submit your benefit eligibility date to ICMA-RC via EZLink before benefits can be paid. Check with your employer to be sure this notification has occurred prior to submitting claims to Meritain Health, Inc.*