

Guide to submitting Dependent Care (DCFSA) claims on Forma



What details do I need when submitting a DCFSA pre-tax claim?

When submitting a Dependent Care pre-tax claim, be sure to include the following information to help us process your request quickly:

- **Amount** – The amount you're claiming
- **Merchant or Provider** – Where you made your purchase
- **Category** – The category that best describes the expense
- **Service Recipient** – The name of the person who received the product or service (you or a dependent)
- **Service Start Date** – Start date of the service
- **Service End Date** – End date of the service (required for Dependent Care FSA claims)
- **Description** – A short description of the purchase
- **Upload Receipts** – Attach an itemized receipt or supporting documentation that shows proof of purchase



What information do I need to include on the receipt?

When submitting a claim, you'll need to **upload a receipt or proof of purchase** to show that your expense is eligible for reimbursement. This helps us process your claim quickly and make sure everything is good to go! Your receipt should include a few key details: your name (or your dependent's name if you're submitting on their behalf), the merchant or provider's name, the service purchased, the service date(s), and the amount paid.

What if I don't have all the necessary receipt info?

If you pay out-of-pocket and don't have an itemized receipt for your DCFSA purchase, you can complete a [Reimbursement Form](#) and submit it along with your claim.

Considerations when submitting a claim for a dependent

Before submitting a claim for a dependent, double-check that you've added them to your Forma account. You can find steps on how to do that in our guide: [How do I add, edit, or remove dependents?](#) Providing all the right information upfront helps us process your claim faster, so you can get reimbursed without any delays!

How does a rolling Dependent Care FSA claim work?

If you have a large eligible Dependent Care FSA (DCFSA) expense that exceeds your current account balance, you can submit it as a single claim. Once approved, the claim will be reimbursed on a rolling basis throughout the plan year.

- You'll first receive reimbursement for the amount currently available in your DCFSA.
- As additional contributions are made through payroll deductions, you'll automatically receive ongoing reimbursements until the full claim amount is paid out.

Important: Rolling claims are **only approved for services that have already taken place**. All service dates must be in the past at the time of submission.

Can I Submit a Claim for a Future Service?

No. Dependent Care FSA (DCFSA) claims can only be reimbursed for services that have already been provided. This means you must wait until after the care has occurred before submitting a claim, even if you've paid in advance.

Who is eligible under my DCFSA?

Dependent Care FSA (DCFSA) expenses must be work-related, meaning the service is rendered while you're at work or school. The dependent must be 12 years old or younger, or older than 13 and physically or mentally incapable of self-care.

What's eligible for reimbursement?

- Daycare ✓
- Preschool ✓
- Babysitter ✓
- After-school care ✓
- Summer day camp ✓
- Au pair and au pair agency fees ✓

What's ineligible for reimbursement?

- Tutoring ✗
- Sports lessons ✗
- Private school tuition fees ✗
- Babysitting by a tax dependent (i.e. a sibling) ✗
- Virtual care (i.e. online day camps, online classes) ✗
- Overnight/sleep away camp ✗
- Medical expenses for dependents ✗

Do my DCFSA contributions continue while I'm on a leave of absence?

No, your contributions will be paused during a leave of absence (LoA). Since a DCFSA is designed to cover eligible dependent care expenses that enable you to work, contributions are only made while you are actively employed.



Common reasons why DCFSA claims are rejected

- Need a more detailed receipt
- Dependent Care FSA (DCFSA) expenses not fully rendered
- Service recipient not matching / Dependent not added to your Forma account
- No service start or end date
- Expense is not eligible under the plan
- Receipt falls outside of pre-tax coverage dates