Faculty and staff who participate in the Dependent Care Flexible Spending Account and have a family adjusted gross income up to $130,000 can apply for reimbursement by completing this Dependent Care University Match application and submitting their Form 1040 from the previous tax year. Form 1040 must outline the dependents you claim and clearly state your family adjusted gross income (Line 8b). You may redact information such as SSN, DOB, etc. for purposes of submitting your taxes. An example of a form 1040 is provided here with the sections we review highlighted in yellow. Other versions of Form 1040, such as Form 1040A, are also accepted and will be formatted differently than the example here, but the same information must still be listed.

The reimbursement amount for which you are eligible is based on your family adjusted gross income:

<table>
<thead>
<tr>
<th>Household Earnings</th>
<th>Northwestern Election Match (%)</th>
<th>Maximum Contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to $60,000</td>
<td>80%</td>
<td>$4,000 per year</td>
</tr>
<tr>
<td>$60,001-$75,000</td>
<td>60%</td>
<td>$3,000 per year</td>
</tr>
<tr>
<td>$75,001-$100,000</td>
<td>40%</td>
<td>$2,000 per year</td>
</tr>
<tr>
<td>$100,001-$130,000</td>
<td>20%</td>
<td>$1,000 per year</td>
</tr>
</tbody>
</table>

Notes:
- Northwestern maximum reimbursement is based off an annual election of $5,000
- University contributions are added to a participant’s taxable wages

Matching funds are added to each eligible pay check on a monthly or semi-monthly basis. Employees will see their full Dependent Care FSA deduction on a pre-tax basis plus an earnings for the match. For example, a monthly employee with household earnings less than $60,000 who has an annual election of $5,000 will see the following on their paycheck:

- Monthly FSA Deduction: $416.67
- Monthly University Match: $333.34

The total contribution to the Dependent Care FSA by both the University and employee will never exceed the IRS limit or the employee’s annual election, whichever is less.
Completing the Match Application

1. Access the online application
2. Login with your myHR username and password. MFA might be required
3. Your employee ID, net ID, name, and email address will automatically populate
4. Select your filing status from your previous years taxes
5. Enter your household adjusted gross income from your previous years taxes
6. If married, enter your spouse’s employer or school (Note your spouse must work and/or go to school on a full-time basis to be eligible)
7. Enter the total Dependent Care FSA benefit you elected
8. Enter the tax year for the adjusted gross income you input in step 5
9. Add your eligible dependents
  a. If you have more than one dependent select Add. Don’t select add if you don’t have more than one dependent
10. An estimate of the match you will receive will calculate (note this is only an estimate)
11. Upload a PDF of your taxes from the previous tax year (Note you may redact information such as SSN’s, DOB’s, etc.)
12. Read the information in the signature section and check the button
13. Click submit to finalize application

If your application does not submit, look for the error in RED.