



# Helpful Tips for Successfully Filing a Request for Reimbursement to your Health FSA.

## 1. **Complete your Health FSA Request for Reimbursement Form legibly.**

If your form can not be read properly, it cannot be processed accurately.

## 2. **Provide appropriate supporting documentation.**

IRS rules say that you must provide appropriate documentation. All documentation must show:

- The date of service (the date you incurred the expense)
- The name of the service provider
- To whom the service was provided (patient's name)
- The out of pocket expense (amount you paid for the service)
- A clear and detailed service/procedure description

## **What is Acceptable documentation?**

Examples of good documentation are:

- An Explanation of Benefits (EOB) from your insurance carrier showing the above information. If the EOB indicates the procedure is not covered by your health insurance plan, you may be required to submit an itemized statement from the provider.
- For prescription drugs, a pharmacy statement including the name of the pharmacy, patient's name, date the RX was filed, patient's cost, RX number and name of the drug.
- For over the counter medications, an itemized cash register receipt that includes, the name of the medication and the purchase date should be indicated on the receipt.
- "Dual purpose" items will not be reimbursed without further substantiation of the medical condition being treated. This will require a letter of medical necessity from the medical provider. This is because some items have both a medical purpose and a general health/personal/cosmetic purpose and the IRS requires further documentation. One example of a dual purpose item would be vitamins if you are taking an iron supplement it would not be allowed under the guidelines but if we have a letter of medical necessity from your provider that you are taking the supplement to treat a specific condition such as anemic then it would be an allowable reimbursable item under the health FSA.

## **Unacceptable documentation:**

Bank card statements, credit card receipts, canceled checks, estimates of expenses, account balance statements and balance forward statements are not valid documentation.

## 3. **Sign your form.**

An unsigned form will stop your reimbursement!

## 4. **Fax or Mail your Form.**

Fax your request to our toll-free fax. You can also mail it if you prefer.