

Helpful Tips for Successfully Filing a Request for Reimbursement.

1. **Complete your Request for Reimbursement Form legibly.**

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

- Do not highlight receipt items. Circle them instead.
(High-lighter when faxed or scanned can appear as black or gray)
- Only submit expenses for an eligible dependent. An eligible dependent must meet the provisions of sections 105 and 106 of the U. S. Internal Revenue Code.

2. **Provide appropriate supporting documentation.**

IRS rules state 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:

- A Claim Process Report or 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.
- As of January 1, 2011, over-the-counter (OTC) medications and other "dual purpose" items will not be reimbursed without a written doctor's prescription. You must also include an itemized receipt indicating the item purchased.

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.

