

How to File Claims

IRS guidelines require specific documentation to substantiate each claim submission. The following chart provides an easy description of how to file claims and the type of documentation that is acceptable. Also included is a description of documentation that is not acceptable.

If Covered By Insurance	<p>It is recommended that you submit to your insurance carrier first and obtain the insurance explanation of benefits (EOB) as follows:</p> <ol style="list-style-type: none">1. Have the provider submit claim to insurance payer first.2. Insurance payer will send you an Explanation of Benefits (EOB) showing the amount you owe.3. Complete FSA claim form and include EOB to claim the amount you owe after insurance has paid.
Prescriptions	<p>Complete FSA claim form and include:</p> <ul style="list-style-type: none">• Pharmacy script or mail order statement showing patient name, name of drug/Rx item, date filled, dollar amount; or,• Itemized printout of prescription from pharmacy. <p>★ <i>Hint: You may be able to register at your pharmacy website to view your account and obtain an itemized list of prescriptions.</i></p> <p>Complete FSA claim form and include:</p> <ol style="list-style-type: none">1. Cash register receipt showing merchant name, date, product description, dollar amount; and,2. Written prescription from the patient's attending physician. <p>➔ Note: <i>Examples are antacids & digestive aids, allergy & sinus, antibiotic products, anti-diarrheal & laxatives, anti-gas products & stomach remedies, anti-itch & insect bite treatments, baby rash ointments, cold sore remedies, cold/cough/flu/pain relief products, motion sickness, respiratory treatments, sleep aids/sedatives, etc. Some alternative treatments may require a letter of medical necessity from the patient's attending physician.</i></p> <p>★ <i>Hint: Check your drugstore website as many have online FSA sections that are excellent sources of information!</i></p>
Over-the-Counter Drugs/Medicines	<p>Complete FSA claim form and include:</p> <ul style="list-style-type: none">• Cash register receipt showing merchant name, date, product description and the dollar amount paid. <p>➔ Note: <i>Physician prescription is not required for items that are not a drug or medicine. Examples are bandages, birth control, braces & supports, catheters, contact lens supplies & solutions, denture adhesives, diagnostic tests & monitors, elastic bandages & wraps, first aid supplies, insulin & diabetic supplies, reading glasses, wheelchair, walkers, canes, etc.</i></p> <p>★ <i>Hint: Check your drugstore website as many have online FSA sections that are excellent sources of information!</i></p>
Over-the-Counter Medical Items FSA <input checked="" type="checkbox"/>	<p>Complete FSA claim form and include an itemized statement clearly showing:</p> <ol style="list-style-type: none">1. Provider name/address,2. Date service was provided (not the date you paid for the service),3. Patient name,4. Description of service (eye exam, x-ray, crown); and,5. Dollar amount you owe (regardless if paid). <p>★ <i>Hint: Your health care provider may not automatically provide an itemized statement, so you may need to ask for it.</i></p>
If Not Covered By Insurance	<p>Complete FSA claim form and include:</p> <ul style="list-style-type: none">• Payment coupon for monthly appointment; or,• Itemized statement and payment receipt if claiming one upfront payment (if allowed under your plan). <p>★ <i>Hint: Some employer plans have specific payment requirements. Check your plan for this information.</i></p>
Orthodontia	<p>Complete FSA claim form and include:</p> <ul style="list-style-type: none">• Provider signature on the claim form; OR,• Itemized statement from provider showing: <ol style="list-style-type: none">1. Provider name/address,2. Date the child/elder care services was provided, ➔ Note: <i>Do not submit for services that have not yet been provided or future dates of service. Submit for a full month after the month has ended or submit for the previous week's expenses.</i>3. Name of dependent for whom the care was provided,4. Type of service (daycare, day camp, preschool, after-school care, etc.); and,5. Dollar amount you owe. <p>★ <i>Hint: Save time and paper by having your dependent care provider sign the claim form to certify the care was provided!</i></p>
Dependent Care (Work-related Child or Elder Daycare)	<p>IRS rules are strict. Examples of unacceptable claim documentation are:</p> <ul style="list-style-type: none">• Cancelled checks• Credit card receipts• Statements that are not itemized and say "balance forward" or "previous balance due" or "paid on account"• Statements for service that has not yet been provided, i.e., future dates of service• Pre-treatment estimates of services to be provided in the future• Statements that do not include the date service was provided• Statements that do not include the description of service• Statements that do not include the provider name, patient name and dollar amount you owe <p>★ <i>Hint: Just follow the guidelines above to ensure your claim is processed as quickly as possible.</i></p> <p>KEEP YOUR ORIGINAL DOCUMENTATION FOR YOUR RECORDS, AND SUBMIT A LEGIBLE COPY WITH YOUR CLAIM!</p>



Dues-share w/Health & Dependent Care Flexible Savings Account (FSA) Claim Form

Your Name (Last, First, MI)		Social Security No.		Your Employer Name	
Address			City	State	Zip Code

Health/Dental Care FSA Claims

Follow the instruction page "How to File Claims" and submit correct documentation to assure rapid claim processing!

Date(s) of Service	Health Care Provider	Type of Expense <small>(Office Visit, Crown, Eyeglasses, Rx, etc.)</small>	Patient Name	Relationship to You	Amount Requested
					\$
					\$
					\$
					\$

Dependent Care Claims

Date(s) of Service	Day Care Provider	Type of Expense	Dependent Name	Relationship to You	Amount Requested
					\$
					\$
					\$
					\$

Dues-Share Claims

Date(s) of Payment	Vender Name	Type of Expense	Period of Coverage	Amount Requested
				\$
				\$
				\$

I certify that all expenses for which reimbursement or payment is claimed by submission of this form were incurred by me, an eligible spouse, or an eligible dependent during a period while I was covered under my employer's FSA Plan and that the expenses have not been reimbursed and reimbursement will not be sought from any other source. I understand that I am fully responsible for the accuracy of all information relating to this claim, and that unless an expense for which reimbursement is claimed is a proper expense under the Plan, I may be liable for payment of all related taxes including federal, state, or local income tax on amounts paid from the Plan which relate to such expense. A claim will only be processed with a completed and signed claim form and correct documentation.

Employee Signature _____

Date _____

Submit Claim to:
Mr. Joel Youkers
At: Joel@maumeevp.org

Approved by: _____

Date _____

Claims Administrator