

What Information is Required For Claim To Be Approved?

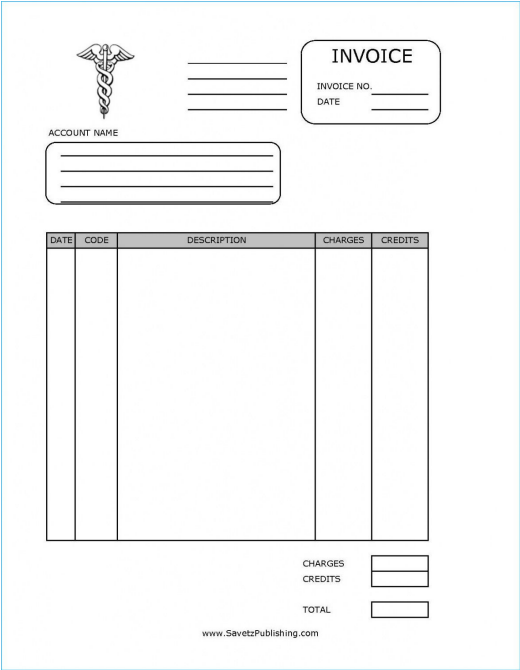

For Medical FSA Claims:

In order for your claim to be in good order there is specific detail that is required. When submitting a claim be sure to include a receipt or **Explanation of Benefits (EOB)** with the following information:

- Date service was rendered (Medical FSA claims are based on date of service, not date of payment, with the exception of orthodontia which is based on payment date)
- Description of service or item
- Name of provider of service
- Name of person receiving the service
- Total out-of-pocket cost

RECEIPT EXAMPLES:

Explanation of Benefits (EOB) from insurance provider will have all of the needed information above. If you do not have your EOB you may also provide receipt directly from provider.

YES	NO
 <p>The image shows a medical invoice form. It includes a header with a caduceus symbol and the word 'INVOICE'. Below this are fields for 'ACCOUNT NAME', 'INVOICE NO.', and 'DATE'. A table with columns 'DATE', 'CODE', 'DESCRIPTION', 'CHARGES', and 'CREDITS' is provided for itemizing services. At the bottom, there are boxes for 'CHARGES', 'CREDITS', and 'TOTAL', along with the website 'www.SavetzPublishing.com'.</p>	<p>A credit card payment receipt is not sufficient documentation as it does not provide details on the service date. (exception: Pharmacy receipt for Rx purchase is acceptable)</p>  <p>The image shows a credit card receipt titled 'SAMPLE RECEIPT'. It includes store information (555 S MagStreet, Houston, TX 77045, 555-555-5555), transaction details (STORE: 0000, REGISTER: 001, RECEIVED: 000000), and a table of charges. The total amount is 281.44. It also shows the cardholder's name, Jane Smith, and a signature.</p>

For Dependent Care Claims:

Receipt Requirements

- Date services were rendered
- Name of service provider
- Amount charged
- Name of person receiving service (dependent)

- Tax ID# or SSN of the provider

You may also provide completed claim form with caregiver signature in lieu of an invoice. Claim forms can be accessed in the Tools & Support page of your online account.

Tuition Claims:

Most tuition plans require:

- Receipt of payment. (Invoice must show payments equal to the claim amount not including scholarships and grants)
 - Course Grade to show course completion. (Plan may have minimum grade requirement - please review plan's requirements)
 - Any other documentation required by Employer plan - Not common. (Each plan, if offered, is unique by employer. Please check your plan's requirements for additional documentation needs)
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