


FSA/HRA REIMBURSEMENT CLAIM FORM (Please Print Clearly)

PART 1		PART 2 <input type="checkbox"/> Check here if address has changed and provide new information below.		
Employee Name:		Street or PO Box:		
Member ID:		City:		
Employer:		State:		Zip Code:
PART 3				
Provider & Service Rendered/Item Purchased	*Pay from Prior PY? <input type="checkbox"/> YES	Date(s) of Service	Amount	For Office Use Only
	<input type="checkbox"/> YES			
	<input type="checkbox"/> YES			
	<input type="checkbox"/> YES			
	<input type="checkbox"/> YES			
	<input type="checkbox"/> YES			
	<input type="checkbox"/> YES			
	<input type="checkbox"/> YES			
	<input type="checkbox"/> YES			
	<input type="checkbox"/> YES			
TOTAL →				
Submit claim by: Fax: (585) 427-9320 or Mail: ATTN: Claims Department Benefit Resource, Inc. 245 Kenneth Drive Rochester NY 14623-4277		<div style="text-align: center;">  </div> Signature Required: _____ Date: _____ Employee Certification: By signing the above, I request reimbursement for Medical and/or Dependent Care expenses listed above. Enclosed are itemized bills, receipts or EOBs verifying these expenses. Each expense listed is for a service/item provided to me, my spouse or an eligible dependent, has not been purchased with a Beniversal® MasterCard® Prepaid Card, and will not be reimbursed from any other source. Medical expenses were incurred only for an immediate medical purpose. I understand that these expenses must qualify for reimbursement under the Internal Revenue Code and cannot be claimed as deductions on my personal income tax.		

**If your plan offers the extended grace period allowed by IRS regulations, you must check Yes if you wish to have this expense reimbursed from the prior plan year.*

INSTRUCTIONS FOR SUBMITTING YOUR CLAIM:

- Part 1 of the claim form *must* be completed in full.
- Part 2 of the claim form should only be completed if your address has changed.
- Part 3 of the claim form *must* be completed in full.
- For each item you are claiming in Part 3, you must attach a copy of itemized bills, statements, receipts or insurance company Explanation of Benefits (EOBs). This documentation from your provider *must* include the following information (*please retain originals for your personal records*).
 - Name of provider
 - Date(s) service was provided
 - Type of service provided (for prescriptions, must include name of drug)
 - Your out-of-pocket cost for the service
 - Name of person receiving the service
- IRS regulations require additional documentation for the following:
 - Effective 01/01/2011, over-the-counter drugs and medicines require a prescription.
 - Dual purpose items require a Certification of Medical Necessity form (*can be obtained from the Benefit Resource website*).
- The claim form *must* be signed and dated after reading the Employee Certification.
- Submit the completed claim form and all related documentation to: **Fax: (585) 427-9320 or ATTN: Claims Department
Benefit Resource, Inc.
245 Kenneth Drive
Rochester NY 14623-4277**

CLAIM SUBMISSION REMINDERS:

- Credit card statements, cancelled checks and balance forward/prior balance statements *are not* acceptable.
- The service being claimed must be provided to you, your spouse or your eligible dependent within the time frame indicated in your Plan Highlights.
- In general, IRS regulations do not require that you pay for a service before requesting reimbursement. A request for reimbursement must be based on the date when the service was provided, not the date when a payment was made. (The IRS allows one exception: orthodontia expenses can be based on date of payment, date of service or payment due date on statements/coupons.)
- Claims must be submitted *after* a service is provided, but *before* the end of the run-out period following the end of your plan year.
- Claims must be received by Benefit Resource, Inc. within the time frames specified in the Plan Highlights.
- An expense paid with the Beniversal Card or that has been reimbursed from any other source cannot be submitted for reimbursement.
- Items on a claim form or supporting documentation should never be highlighted since highlighted items can be hard to read.

SOME EXPENSES THAT ARE NOT ELIGIBLE FOR REIMBURSEMENT FROM A MEDICAL REIMBURSEMENT ACCOUNT INCLUDE:

- Personal care items (e.g. shampoo, soap, electric toothbrush, toothpaste, mouthwash)
- Teeth whitening
- Insurance premiums

SOME EXPENSES ARE ONLY ELIGIBLE FOR REIMBURSEMENT FROM A MEDICAL REIMBURSEMENT ACCOUNT IF CERTIFIED BY A LICENSED MEDICAL PROVIDER AS PREVENTING, TREATING, OR MITIGATING A SPECIFIC PHYSICAL DEFECT OR ILLNESS:

- Cosmetic services
- Vitamins
- Non-prescription sunglasses
- Exercise and weight loss programs

