

HOW TO REQUEST REIMBURSEMENT FROM YOUR HEALTHCARE ACCOUNT

This form is to be used to **request reimbursement for healthcare expenses only**. To view a detailed list of eligible medical expenses, visit mymra.wageworks.com. All healthcare expenses should first be filed under your employer's healthcare plan or any other coverage you may have. Generally, eligible expenses include: allowable expenses covered but not fully reimbursed by any benefit plans, such as co-payments; and allowable expenses NOT covered by any benefit plans, such as over-the-counter medicines.

Step 1: Fill out the form by using the Interactive feature or printing

- Please print in capital letters, with your letters centered in the boxes provided and fill in all ovals as shown:

A	B	C	D		1	2	3	4
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YES NO

- For Section 2 Complete a separate line for each individual expense. Do not lump expenses together.

- Complete all sections of the form. Sign and date the bottom of the form.

Step 2: Attach supporting documentation

- Copy your receipts or other supporting documentation onto a white, letter-sized sheet of paper. Place your receipts so they all face the same direction. And write your Social Security Number at the top of the page.

Step 3: Submit your form (Faxing is faster)

- By Fax: Send the form and copied receipts together as one fax. Do not include a fax cover sheet.
- By Mail: Place the form and the supporting documentation into an envelope, apply the correct postage, and mail.
- If you provide your e-mail address, WageWorks will e-mail you confirmation we received your form.
- Keep a copy of your completed form and receipts for your records.

Step 4: Receive your reimbursement (Direct Deposit is faster)

- By using Direct Deposit or Electronic Funds Transfer (EFT), you'll receive your reimbursement funds up to five days faster than by receiving a check. To sign up, log in to your account at mymra.wageworks.com and select "Direct Deposit Sign-Up" from the left-side menu.

Type of Supporting Documentation:

- Itemized receipt from your medical, dental or vision provider or pharmacy
- Itemized receipt for over-the-counter medicines—must show the name of the product
- Detailed statement, such as an Explanation of Benefits (EOB) from your insurance company or healthcare provider
- Documentation must show:
 - Date of service or purchase
 - Type of service or name of product
 - Amount (your portion of payment)

Please Do NOT:

- Use red ink
- Use a photocopy of the form
- Highlight receipts or any part of the form
- Staple your copied receipts to the form
- Write outside the boxes provided
- If faxing, fax the same form more than once
- Mail the same form that you have faxed
- Include this instruction sheet with your fax
- Submit expenses for multiple plan years on the same form

COVERAGE CODES – You must include a code on Section 2 of the form.

Medical codes

- 101 = co-payments
- 102 = over-the-counter medicines
- 103 = prescriptions or prescription co-pays
- 104 = general medical
- 105 = chiropractic/physical therapy
- 106 = in-patient hospital expense
- 107 = massage therapy
- 108 = counseling/psycho therapy
- 109 = weight/fitness management*
- 110 = cosmetic surgery & procedures*
- 111 = vitamins and supplements*
- 112 = orthotics
- 113 = electrolysis/hair restoration*
- 114 = hearing aids
- 199 = other medical

Dental codes

- 201 = co-payments
- 202 = general dental (cleanings, x-rays, crowns, implants, dentures)
- 203 = orthodontia
- 204 = teeth whitening, bonding, veneers*
- 205 = other dental

Vision codes

- 301 = co-payments
- 302 = over-the-counter vision (contact solutions, etc.)
- 303 = general vision (exams, glasses, contact lenses)
- 304 = non-prescription sunglasses*
- 305 = vision correction surgery

Other codes

- 999 = other

*Note: * indicates items that are generally not eligible health care expenses.*

New IRS Tax Dependent Definition:

A recent change to the Internal Revenue Code revised the definition of "dependent." Generally speaking, a qualifying child must reside with you for more than half the year and must not provide over half of his/her own support. A qualifying relative is an eligible individual if (1) you provide more than half of the individual's support, and (2) the individual is not a qualifying child of you or any other taxpayer. **Please note that any questions regarding the status of an individual as either a qualifying child or a qualifying relative must be discussed with a qualified tax advisor in conjunction with the provisions of your employer's plan.**

Questions? Need a list of eligible expenses? Go to mymra.wageworks.com

or call WageWorks at 1-866-697-6078

Page #1

SECTION 1: YOUR INFORMATION

SOCIAL SECURITY NUMBER OR EMPLOYEE ID (NO DASHES)

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COMPANY NAME

SFHP

EMPLOYEE LAST NAME

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EMPLOYEE HOME ZIP CODE

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FOR WageWorks ONLY

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EMPLOYEE EMAIL

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DAYTIME PHONE # (AREA CODE FIRST, NO DASHES)

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SECTION 2: YOUR HEALTHCARE EXPENSES

EXPENSE 1
COVERAGE CODE (SEE PAGE 1)

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DATES OF SERVICE (MMDDYY)

FROM

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REQUESTED AMOUNT (DOLLARS . CENTS)

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COVERED BY INSURANCE?

YES NO

TO

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PATIENT DATE OF BIRTH (MMDDYY)

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EOB ATTACHED?

YES NO

EXPENSE 2
COVERAGE CODE (SEE PAGE 1)

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DATES OF SERVICE (MMDDYY)

FROM

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REQUESTED AMOUNT (DOLLARS . CENTS)

\$													
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COVERED BY INSURANCE?

YES NO

TO

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PATIENT DATE OF BIRTH (MMDDYY)

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EOB ATTACHED?

YES NO

EXPENSE 3
COVERAGE CODE (SEE PAGE 1)

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DATES OF SERVICE (MMDDYY)

FROM

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REQUESTED AMOUNT (DOLLARS . CENTS)

\$													
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COVERED BY INSURANCE?

YES NO

TO

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PATIENT DATE OF BIRTH (MMDDYY)

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EOB ATTACHED?

YES NO

SECTION 3: CERTIFICATION Please read Certification Statement thoroughly before signing.

I hereby certify that:

- I have read and understand the instructions on page one.
- The information contained within this form is correct.
- I have not received reimbursement previously for these expenses from my Healthcare Account or any other plan and will not seek reimbursement by any other plan.

I understand that:

- Reimbursement is not a guarantee that this payment is tax free.
- Healthcare expenses reimbursed through this account cannot be used as a deduction on my personal income tax return.

I hereby authorize release of payment through my Healthcare Account.

I hereby authorize WageWorks or its representatives to obtain necessary information from all physicians, hospitals, medical service providers, pharmacists, employers, and all other agencies or organizations (this includes other insurers) to consider the claim for reimbursement under my Healthcare Account.

FAX: 1-866-643-2219 Toll Free
MAIL: WageWorks Spending Accounts
PO Box 34700
Louisville, KY 40232
PHONE: 1-866-697-6078

Employee Signature _____ Date _____