

<b>PART 1</b>	<b>PART 2</b> <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: <span style="float:right">Zip Code:</span>

PART 3							
Provider & Service Rendered/Item Purchased	*Pay from Prior PY?	Date(s) of Service	**First & Last Name of Person Receiving Service (HRA Only)	**Relationship (HRA Only)	**Date of Birth (HRA Only)	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						
	<input type="checkbox"/> YES						
	<input type="checkbox"/> YES						
	<input type="checkbox"/> YES						
	<input type="checkbox"/> YES						
<b>TOTAL =</b>							

Submit claim by:  
 Fax: (585) 427-9320  
 or  
 Mail: ATTN: Claims Department  
 Benefit Resource, Inc.  
 245 Kenneth Drive  
 Rochester NY 14623-4277



**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 or a qualifying individual, has not been purchased with a Beniversal® Prepaid Mastercard®, 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.*

**\*\*Effective for plan years that begin on or after January 1, 2017, reimbursement of eligible expenses from your HRA can only be for you, your spouse and/or your eligible dependents who are covered under a group health insurance plan as outlined in your Plan Highlights. For example:**

- if your HRA plan year begins January 1, 2017 and your Plan Highlights indicate that expenses must be provided to you, your spouse or eligible dependents who are covered by a group health insurance plan, then you can be reimbursed only for eligible services provided on/after January 1, 2017 for qualifying individuals.
- if your HRA plan year begins June 1, 2017 and your Plan Highlights indicate that expenses must be provided to you, your spouse or eligible dependents who are covered by a group health insurance plan, then you can be reimbursed only for eligible services provided on/after January 1, 2017 for qualifying individuals.

The following information is required:  
 Relationship: Complete this column using Self, Spouse or Dependent.  
 Qualifying individual's date of birth.

See page 2 for important information on completing and submitting this form.

**INSTRUCTIONS FOR COMPLETING YOUR CLAIM:**

1. Part 1 of the claim form *must* be completed in full.
2. Part 2 of the claim form should only be completed if your address has changed.
3. Part 3 of the claim form *must* be completed in full.
4. 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
  - Your out-of-pocket cost for the service
  - Type of service provided (for prescriptions, must include name of drug)
  - Date(s) service was provided
  - Name of person receiving the service
5. 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*).
6. The claim form *must* be signed and dated after reading the Employee Certification.
7. 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 or a qualifying individual 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

