Flexible Spending Account Reimbursement Claim Form

Please attach the required documentation to this form and send to: (See back of form for explanation of required documentation) **McGriff Flexible Benefit Solutions**
Post Office Box 6400
Greenville, SC 29606 OR

Fax number: 1-252-293-9048 or 1-252-293-9049 **Number of pages in this fax _____**
Email: flexclaims@mcgriffinsurance.com

OPTIONS FOR OBTAINING ACCOUNT INFORMATION:
website www.mcgriffinsurance.com/flex
1-800-930-2441 or 1-800-768-4873 (Monday thru Friday 8:00 a.m.–8:00 p.m. ET)

Your Employer_____

Employee Name: **Social Security Number:**

Daytime Phone Number: **Email:**

Health Care Expenses

☐ **(1) I have insurance for this expense.** Attach a copy of the explanation of benefits (EOB) statement that you received from your insurance carrier showing how benefits were paid. ***IMPORTANT NOTE: IF YOU HAVE GROUP INSURANCE COVERAGE BUT DO NOT SUBMIT AN EOB OR AN ITEMIZED STATEMENT SHOWING THE PORTION PAID BY INSURANCE YOUR CLAIM WILL BE DENIED.*** **If the documentation provided clearly shows that the expense is for a co-pay, an EOB is not required.**

☐ **(2) I do NOT have insurance coverage for this expense.** Submit an itemized statement showing the date of service, provider's name, patient name, services provided, and the amount of the charge.

Service Provider	For the Benefit of (Name)	Relationship	Date of Service	*Expense Type	Reimbursement Request Amount
					$
					$
					$

***Expense Type Code: **D**=Dental **H**=Hearing **V**=Vision **P**=Prescription **M**=Misc./Medical **O**=Orthodontia

Additional claim lines provided on back of form .

Total Health Care Reimbursement Requested $_____(A)

Dependent Daycare Expenses

Service Provider and Tax ID or SSN	Dependent Name and Age	Relationship	Date of Service	Reimbursement Request Amount
				$
				$

Total Dependent Daycare Reimbursement Requested $_____(B)

TOTAL REIMBURSEMENT REQUESTED $_____(A+B)

I certify that the charges listed for dependent day care services have been incurred for the dates shown.

_____ _____ _____
Signature of Provider **Date** **Tax ID #/SSN**

Employee Certification

1. The health care expenses claimed above are not eligible for reimbursement by any insurance carrier or employer-sponsored plan.
2. The dependent care expenses claimed above are employment-related, have not been paid to a dependent, and are not greater than either my earned income or my spouse's earned income.
3. The expenses claimed above have not been and will not be taken as a credit or deduction on my personal income tax return.

Employee Signature_____ Date_____

Claims cannot be processed without the participant's signature.
See back for additional information on completing this form.

Instructions and Important Information Regarding Reimbursements

For information regarding eligible and ineligible expenses under the Health Care and Dependent Daycare Reimbursement Accounts, please refer to your enrollment materials or visit the IRS at www.irs.gov

Health Care Expenses

There are two boxes on the front of this form describing the type of claim(s) you are submitting. Please mark the box or boxes that apply. Below is the documentation required for each type of claim:

(1) I have insurance for this expense.

If you have insurance coverage, a complete copy of an explanation of benefits (EOB) or a complete itemized statement from the provider showing the portion paid by insurance must be included. The EOB or itemized statement must include:

- The date of service
- Description of services provided
- Total amount of charges
- Patient name
- Amount covered by insurance
- Patient responsibility amount

(2) I do NOT have insurance coverage for this expense.

If the expense is not covered by insurance, an itemized receipt must be submitted. The receipt must contain:

- The date of service
- The name and address of the provider
- Patient name
- The services provided
- The cost

(3) When mailing claim form and documentation please do not staple, tape or highlight items.

Please note the following items are NOT acceptable forms of documentation:

- **Credit card receipts**
- **Check copies**
- **Balance due or balance forward statements**
- **Paid on account statements**

Dependent Daycare Expenses

- For reimbursement of dependent daycare expenses, you must have your day care provider sign and date the authorization on the previous page. The Federal Tax Identification Number is required in order for the claim to be reimbursed.

OR

- You may submit an itemized receipt from the daycare provider, containing the date of service, provider name, tax identification number, address of provider, dependent name, and cost.

Please retain copies of all items submitted for your records.

Health Care Total from Front of Form $_____(A)

Service Provider	For the benefit of (Name)	Relationship	Date of Service	*Expense Type	Reimbursement Request Amount
					$
					$
					$
					$
					$
					$

*Expense Type Code: **D**=Dental **H**=Hearing **V**=Vision **P**=Prescription **M**=Misc./Medical **O**=Orthodontia

Total Amount of Health Care Reimbursement Requested $_____(A)