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HRA REIMBURSEMENT PROCEDURES



HEALTH REIMBURSEMENT ACCOUNT EXPENSES:

The IRS substantiation rules for medical claims reimbursements are very specific. It is based on medical validity, dates of incurred services (not paid claim dates!) and proof that the claim was not elsewhere reimbursed. You need to submit ALL of the documentation to support this.

Doctors, Specialists, and Hospital Visits need the following:

- Patient's Name (who received services?)
- Doctor's Name (who performed services?)
- Date of Service (date the service was performed)
- Service Rendered (what did the doctor do?)
- Insurance Reimbursement (what portion is insurance reimbursing? This can be found on an Explanation of Benefits from your Insurance Provider if it is not on your doctor's bill. If you decided not to submit for insurance reimbursement, you must send a letter indicating and certifying to that fact.)

Prescriptions:

- Name of Patient (person drug is for)
- Name of Doctor (who prescribed the drug)
- Date Filled (date the pharmacy filled the script)
- Name of Drug (e.g.; Allegra, Vioxx, Concerta)
- Insurance Reimbursement (usually says "Insurance Pays \$**.**. - You Pay \$**.**.")