

Claim Filing Requirements

1. **Print your name, address and social security number.**
"X" the Address or Name Change box to indicate a name or address change.
2. **List expenses by date & arrange the supporting statements in the same order.** Highlight or circle the service dates on your documentation. If you have several statements from the same provider, you may subtotal them and list them on one line with a range of dates.
 - Day care claims - complete the Dependent Care Assistance section
 - Health care claims - complete the Flexible Medical Benefits section (The amount column should be the amount you are requesting after any insurance payment or provider discount for each expense).
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3. **Enclose required documentation** *. A written statement from the dependent care or medical (Dr., hospital, pharmacy, etc.) provider of the service or an insurance company benefits statement showing:
 - The name of the dependent care or medical service provider,
 - The date or range of dates of medical service or day care. Although this date may be the same as the date paid it must be clear on what date the service was provided. The services must have already been completed.
 - A description of the service provided (for example, for health care, "dental cleaning", or for day care "day care"),
 - The name of the person or persons receiving the medical or dependent care, and
 - The cost of the service, not just the amount paid.

***Dependent Care claims only.** - You may either provide documentation from the day care provider or have the provider complete the Dependent Care Assistance Section, then sign on the "Provider's Signature" line and date the signature. You do not need to do both.

Requests filed without the above documentation cannot be processed and will be returned.
4. **Sign** the claim form.
5. **Keep** copies for your tax records.
6. **Mail** to the address on the front of this form or **Fax to (573) 874-0425 inside Columbia or toll free at (866) 381-9682.**
Employee use of an office fax machine may not be appropriate. Please check with your employer before using an office fax

Over-the-counter medicines & drugs: Additional filing requirements for purchases, starting 01/01/04, under the medical FSA:

- The receipt or documentation from the store must include the name of the drug printed on the receipt. This information must be provided by the store, not just listed by the participant on the receipt or on the claim form.
- The participant must indicate the existing or imminent medical condition on the receipt, on the claim form, or on a separate enclosed statement each time these items are claimed. Purchases for general good health will not be accepted.
- To claim vitamins, herbs or nutritional supplements, you must have a written diagnosis of the medical condition and "prescription" of all specific items for that condition on file with the claims office. You must renew this physician notice every 12 months and file it with the claims office with the first claim submitted for those items each plan year.

Orthodontics: Requests may be reimbursed for a reasonable monthly payment on or after the payment is due and paid. The payment must be a reasonable approximation of the value of each month's service. You may only file claims for orthodontic payments while treatment is in process. You must submit a paid receipt from your orthodontist or a photocopy of the monthly coupon and your check. Pre-payments are not allowed. You must submit a written statement from the orthodontist showing the charge for the initial installation work, when it was completed and a paid receipt to claim an initial down payment or appliance fee.

Medical equipment: Requires a letter from a physician every 12 months stating the nature of your medical condition, the specific equipment needed and that the equipment is essential to the treatment.

Claims payment and account information available 24 hours a day 7 days a week: - Complete history including available funds *on the Web* at www.mocafe.com/flexreports. You will need your P.I.N., which you can find on your enrollment confirmation. *InfoLine* - last two payments plus available funds. Call 634-1333 in Jefferson City or 1-800-659-3035 outside of Jefferson City from a touch-tone phone.

Claim forms: You may copy this form. Obtain forms on the Internet at <http://www.mocafe.com>. Request them from your personnel/payroll office. Call us at 442-3035 (1-800-659-3035 outside Columbia, MO).