



# Limited-Purpose Flexible Spending Account (LPFSA) Claim Reimbursement Instructions

## **LPFSA HEALTH CARE EXPENSES:**

- **LPFSA Health Care Expenses Include:**
  - Dental plan deductibles and expenses not paid by the plan.
  - Other qualified dental expenses not covered by the dental plan.
  - Vision care expenses, including qualified expenses, not covered by a health care benefit.
- *Expenses solely for cosmetic reasons or for general health and well-being are not usually eligible expenses for medical care.*
- *Do not submit expenses previously paid for with your FSA debit card.*

## **SUPPORTING DOCUMENTATION: *Supporting third-party documentation for health care expenses must include at least one of the following:***

- **Explanation of Benefits (EOB)**
  - The statement you receive each time a claim is submitted to your health, dental or vision plan.
- **Itemized Statement or Receipt Containing:**
  - Type of service or product provided (*include prescription name, if applicable*);
  - Date the expense was incurred;
  - Name of the employee/dependent for whom the service/product was provided;
  - Person/organization providing the service/product;
  - Amount of the expense after insurance benefits were provided (*if applicable*).

## **INELIGIBLE EXPENSES AND DOCUMENTATION : *The following are not allowable under Code Section 125 of the IRS:***

- **Unacceptable Documentation:**
  - Credit card receipts or cancelled checks as documentation.
  - Billing statements showing “Previous Balance,” “Balance Forward,” or “Received on Account.”
- **Ineligible Expenses:**
  - Amount paid by insurance.
  - Services for weight loss, home improvements, plastic surgery, and diet counseling are not eligible expenses unless they are medically necessary. A physician’s letter of medical necessity is required for these services.

## **BEFORE YOU SUBMIT YOUR LPFSA HEALTH CARE REIMBURSEMENT CLAIM FORM PLEASE BE SURE TO:**

- Complete the claim form in full.
- Sign and date the claim form.
- Include the appropriate documentation, including the EOB whenever possible, to substantiate your expenses.
- If multiple items are listed on a receipt, **CIRCLE** the items filed for reimbursement.  
**DO NOT highlight the items.**
- Make sure supporting documentation equals the total amount you are claiming for reimbursement.
- Keep a copy of your claim form and any original receipts for your records.