

Helpful Hints for Filling Out a Claim Form

1. Label your attached documentation with the corresponding line number

2. The date(s) services were provided

3. When grouping similar expenses use the span of dates in which the services were provided.

4. Describe OTC expenses to identify their purpose

5. YOUR signature and Date - **required!**

UNREIMBURSED MEDICAL EXPENSE CLAIMS						
A	B	C	D	E	G	
Line	Date Expense Incurred (Date of Service)	Expense Amount Claimed	Detailed Description of Expense	Person for Whom Expense Incurred (self, spouse, etc.)	Name of Service Provider	
1	01/15/05	\$ 25.00	Office Visit Copay	Spouse	Main Street Clinic	
2	01/09/05	\$ 110.00	RX	self	ABC Pharmacy	
3	01/03/05	\$ 32.50	RX	spouse	Your Local SuperStore	
4	03/21/05	\$ 213.89	Eye Glasses	spouse	Hometown Eyes	
5	02/11/05	\$ 32.56	Asprin, Eye drops	self	Your Local SuperStore	
6	03/12/05 04/21/05	\$ 76.90	Dentist	spouse	Dr. No Pass	
7		\$				
8		\$				
		\$ 490.85				

Employee's Signature _____ Date _____

(See the corresponding number in the hints below)

Helpful hints for filling out a claim form

1. Identify the documentation for each line in Column A by writing the line number of the claim form on the documentation.
2. Column B must have the "date of service" – this is NOT the date of the bill or the date of payment.
3. Group like expenses (such as RX or office co-pays) for one person on a single line. For these, you can show a date span by indicating the service with the earliest date to the most recent date of expense.
4. Over the counter expenses (OTC) must be described to determine eligibility. If claims examiner does not recognize a product and its purpose, the claim for that expense is denied.
5. Sign and date your claim form –without your signature and date the entire claim will be DENIED!

Other suggestions:

- ◆ Include ONLY one piece of documentation (Explanation of Benefits, itemized bill) for each expense.
- ◆ Do NOT staple the documentation to the claim form.
- ◆ Cancelled checks, collection agency letters and credit card receipts are generally not proof of expense.
- ◆ Be careful using highlighters! Highlighted items that are photocopied usually are not legible which results in a denial of the claim for that item. You may consider circling instead.
- ◆ When you have completed the claim form and are ready to print, please remember to use the red Print Button at the bottom of the section of the interactive form.