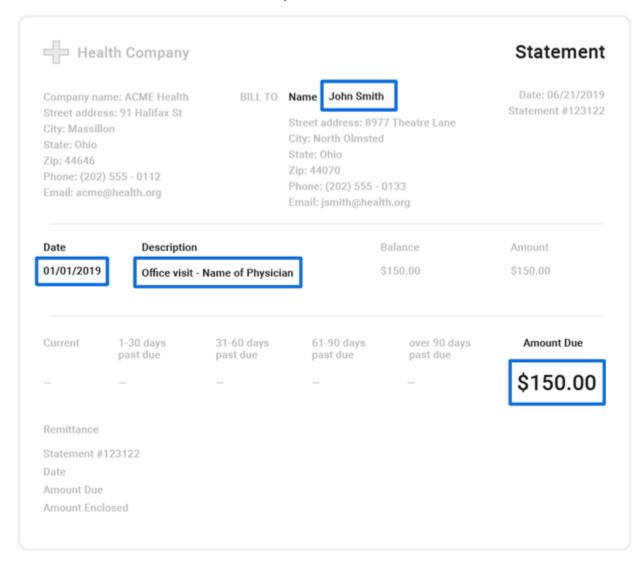


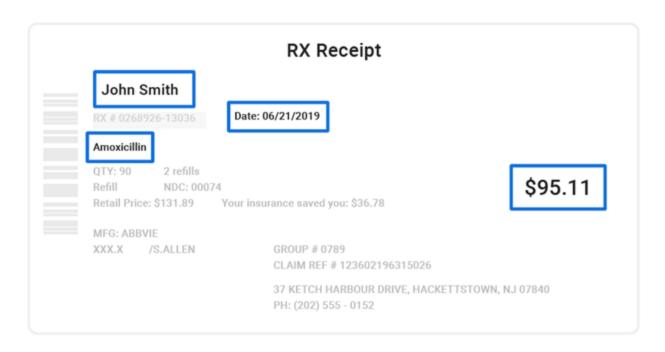
What documentation is needed for my claim?

The IRS requires you to provide documentation to make sure expenses are eligible for reimbursement from your plan. Your documentation needs the following details:

- Name of provider or merchant
- Date of service received or item purchased
- · Description of service received or item purchased
- Dollar amount (after insurance, if applicable)

An **itemized receipt** or **Explanation of Benefits (EOB)** typically has all the required information. See below for a few examples.







Examples of unacceptable forms of documentation include but are not limited to:

- Provider statements that only indicate an amount paid, balance forward, or previous balance
- Credit card receipts
- Bills or invoices for pre-paid medical expenses (i.e. services not yet incurred)
- HSA transactions do not require receipts but you should keep all receipts because you may be asked to provide them by the IRS later