

Reimbursement Request Form

QMCSO



Employer Name: _____

Participant Name (First, MI, Last): _____

Participant Social Security Number: _____ - _____ - _____

Custodial Parent Name (First, MI, Last): _____

Custodial Parent Address: _____

Custodial Parent City, ST, ZIP: 0 _____

Custodial Parent Phone Number (_____) _____

LBS: ROUTE TO SPECIAL PROCESSING

| Claimant Name | Date of Service | Amount | Plan Code* | Type of Service/Item Purchased | # of Miles | Claim Ref # |
|--------------------|------------------|------------------|------------|--------------------------------|------------|----------------|
| <i>John Sample</i> | <i>10/1/2014</i> | <i>\$ 150.25</i> | <i>F</i> | <i>Doctor visit copay</i> | <i>12</i> | <i>Example</i> |
| | | \$ | | | | 01 |
| | | \$ | | | | 02 |
| | | \$ | | | | 03 |
| | | \$ | | | | 04 |
| | | \$ | | | | 05 |
| | | \$ | | | | 06 |

Use one of the Plan Code's below to indicate the account from which payment should be made. Your employer may not offer all the benefit types listed below and certain restrictions may apply. If your employer offers multiple benefit types, Lifetime Benefit Solutions will process the reimbursement based on the rules established by your employer. For example, if you have both an FSA and HRA account, and your employer has identified the FSA as the "pay first" account, your expenses will be applied to your FSA until the balance is depleted with any additional expenses applied to your HRA.

| *Plan Code | Plan Code Description |
|------------|--|
| F | Flexible Spending Account (FSA) or Limited Purpose FSA: Health Care Expenses Only. For Dependent Care expenses, use the Dependent Care Account Reimbursement Request Form |
| H | Health Reimbursement Account (HRA) or Retiree Reimbursement Account (RRA) |
| I | Individual Insurance Policy Premiums |
| M | To submit for medical mileage associated with Health Spending Card transactions. You will only be reimbursed for the medical mileage associated with the miles traveled, since you paid for the service with the Health Spending Card. |

Participant Authorization—By submitting this form to Lifetime Benefit Solutions, I certify that the information here is true and correct.

By submitting this form to Lifetime Benefit Solutions, I certify the information is accurate, the expenses incurred were for myself, spouse or qualified dependents, and these expenses are not reimbursable under any other plan coverage. In addition, I have read the Reimbursement Request Instructions on the following page and agree to adhere to all terms specified. I understand if I do not follow the instructions my reimbursement may be delayed or denied.

- **Mail to:** Lifetime Benefit Solutions, Claims Dept, PO Box 211126, Eagan, MN 55121 or
- **Fax to:** 877-256-7228.
- Call **Customer Service** with questions at 800-327-7130.

Reimbursement Request Instructions

For All Account Types (FSA, HRA, RRA, Insurance Premium)

- For faster reimbursement processing you may be able to submit your claims online at www.lifetimebenefitsolutions.com.
- Complete the top section, including Social Security Number or Employee ID.
- Submit one expense (either a product or service) per row, even if items are contained on the same receipt.
- Label the receipts to correspond to the Claim Ref #.
- If you have more items than the form can accept, use additional forms.
- Do not “lump” or group items together or write See Attached.
- All claims are subject to deadlines, as defined in your Summary Plan Description (SPD).
- The expenses you submit must qualify as valid expenses under the terms of the Plan, and the claimant receiving the services must be a qualifying individual as defined in the Plan.
- Lifetime Benefit Solutions can only process claims that are properly submitted. Claims that are not properly submitted may be delayed or denied.
- Retain a copy of the Reimbursement Request Form and receipts for your own personal records; Lifetime Benefit Solutions is not responsible for retaining copies of your receipts beyond the current Plan year.
- Call Lifetime Benefit Solutions Customer Service with questions at (800) 327-7130 during standard week-day business hours.
- Mail OR fax (but not both!) completed form with required documentation to:

Lifetime Benefit Solutions Claims Dept.
PO Box 211126
Eagan, MN 55121
Fax # (877) 256-7228

Reporting Medical Mileage

- Medical mileage rates are set by the IRS and can be applied to transportation primarily for and essential to medical care.
- Indicate the total number of miles incurred with each service provided (i.e. round trip miles to visit the doctor).
- Lifetime Benefit Solutions will apply the current mileage rate and include the mileage amount in your total reimbursement.
- You may be required to produce additional documentation for each mileage expense you claim.

Medical Claims for FSA, HRA and RRA

- For each medical claim covered by your insurance carrier, submit an Explanation of Benefits (EOB). If your claims are not submitted to your insurance carrier, provide an itemized bill showing: date of service, provider name, patient name, charged amount, and description of services rendered.
- Do not send credit card receipts, original receipts or cancelled checks.
- The IRS states that Over-the-Counter (OTC) items classified as drugs and medicine are only eligible if they are accompanied by a doctor’s prescription.
- Use Plan Code M to report medical mileage associated with a Health Spending Card transaction. For example, if you drove 20 miles to a doctor’s appointment, and paid your copayment amount with the Health Spending Card, you should use Plan Code M to be reimbursed for the 20 miles you drove. You should still complete the full line of information, but you will only be reimbursed for the mileage, not the copayment amount.

Dependent Care Claims

- Please use the separate form titled Dependent Care Account Reimbursement Request Form.

Individual Insurance Premium

- The bill from the insurance carrier must identify participant, premium amount, coverage period, and policy number.