

# Medical Expense Claim Form

# Flexible Spending Account

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Email: info@cpa125.com  
 Phone: 781-848-9848  
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Plan Year: \_\_\_\_\_

Participant Name: \_\_\_\_\_

Employer: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

SSN (Last four)      XXX-XX-\_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Participant Daytime Phone: \_\_\_\_\_

Check if New Address

Email: \_\_\_\_\_

**List Unreimbursed Medical Expenses by Classification**  
*(Participants and IRS Eligible Dependents)*

**Dates of Service**  
 MM/DD/YYYY  
 START      END

**Amount**  
 (\$)

	START	END	Amount (\$)
Medications	-		
Doctor/ Hospital Co-Pays and Deductibles	-		
Dental/ Eyes/ Hearing	-		
Medical Procedures/ Services and Therapy / Labs and Tests	-		
Over the Counter Medicine (attach copy of prescription for each)	-		
Other	-		
		<b>Total</b>	

- All claims require copies of bills/statements/receipts showing date and service. (IRS regulation)
- Cancelled checks/bank statement/credit card receipts are not adequate substantiation.
- Direct deposit payments are processed weekly and funds are typically in your account by the end of the week; however, the bank has 3 business days to post it to your account.
- Checks are mailed bi-weekly.
- Expenses must be incurred during the plan year or before the termination date of employment to be reimbursed.
- Claims received by Monday are typically included in that week's processing.

**Certification**

I, the undersigned, have incurred the expenses listed above that qualify for reimbursement under my employer's cafeteria plan. I have not been and will not be reimbursed for these expenses from any source including, but not limited to, insurance, this plan, or other programs offered by my, or my spouses, employer. I understand these expenses may no longer be claimed as deductions for income tax purposes since I am requesting reimbursement with funds deducted from my compensation on a pre-tax basis. I acknowledge I am solely liable for any taxes or penalties on ineligible expenses submitted through the medical flexible spending account. I, and only I, am responsible for the accuracy and validity of the submitted expenses and will retain substantiation. I hereby request reimbursement for these expenses, and, if applicable, reaffirm the authorization provided to Cafeteria Plan Advisors, Inc. to directly deposit the reimbursement into my bank.

**Participant's Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Attach copies of receipts and mail, fax, or scan as a PDF and email to [info@cpa125.com](mailto:info@cpa125.com)**

**\*Retain originals for your records\***

## Health Care FSA Eligible Expenses

<p><b>BABY/CHILD TO AGE 13</b></p> <ul style="list-style-type: none"> <li>· Lactation Consultant*</li> <li>· Lead-Based Paint Removal</li> <li>· Special Formula*</li> <li>· Tuition: Special School/Teacher for Disability or Learning Disability*</li> <li>· Well Baby /Well Child Care</li> </ul> <p><b>DENTAL</b></p> <ul style="list-style-type: none"> <li>· Dental X-Rays</li> <li>· Dentures and Bridges</li> <li>· Exams and Teeth Cleaning</li> <li>· Extractions and Fillings</li> <li>· Oral Surgery</li> <li>· Orthodontia (reimbursable after payment)</li> <li>· Periodontal Services</li> </ul> <p><b>EYES</b></p> <ul style="list-style-type: none"> <li>· Eye Exams</li> <li>· Eyeglasses and Contact Lenses</li> <li>· Laser Eye Surgeries</li> <li>· Prescription Sunglasses</li> <li>· Radial Keratotomy</li> </ul> <p><b>HEARING</b></p> <ul style="list-style-type: none"> <li>· Hearing Aids and Batteries</li> <li>· Hearing Exams</li> </ul> <p><b>LAB EXAMS/TESTS</b></p> <ul style="list-style-type: none"> <li>· Blood Tests and Metabolism Tests</li> <li>· Body Scans</li> <li>· Cardiograms</li> <li>· Laboratory Fees</li> <li>· X-Rays</li> </ul>	<p><b>MEDICAL EQUIPMENT/SUPPLIES</b></p> <ul style="list-style-type: none"> <li>· Air Purification Equipment*</li> <li>· Arches and Orthotic Inserts</li> <li>· Contraceptive Devices</li> <li>· Crutches, Walkers, Wheel Chairs</li> <li>· Exercise Equipment*</li> <li>· Hospital Beds*</li> <li>· Mattresses*</li> <li>· Medic Alert Bracelet or Necklace</li> <li>· Nebulizers</li> <li>· Orthopedic Shoes*</li> <li>· Oxygen*</li> <li>· Post-Mastectomy Clothing</li> <li>· Prosthetics</li> <li>· Syringes</li> <li>· Wigs*</li> </ul> <p><b>MEDICAL PROCEDURES/SERVICES</b></p> <ul style="list-style-type: none"> <li>· Acupuncture</li> <li>· Alcohol and Drug/Substance Abuse (inpatient treatment and outpatient care)</li> <li>· Ambulance</li> <li>· Fertility Enhancement and Treatment</li> <li>· Hair Loss Treatment*</li> <li>· Hospital Services</li> <li>· Immunization</li> <li>· In Vitro Fertilization</li> <li>· Physical Examination (not employment-related)</li> <li>· Reconstructive Surgery (due to a congenital defect, accident, or medical treatment)</li> <li>· Service Animals</li> <li>· Sterilization/Sterilization Reversal</li> <li>· Transplants (including organ donor)</li> <li>· Transportation to Medical Facility</li> </ul>	<p><b>MEDICATIONS</b></p> <ul style="list-style-type: none"> <li>· Insulin</li> <li>· Prescription Drugs</li> </ul> <p><b>OBSTETRICS</b></p> <ul style="list-style-type: none"> <li>· Doulas*</li> <li>· Lamaze Class</li> <li>· OB/GYN Exams</li> <li>· OB/GYN Prepaid Maternity Fees (reimbursable after date of birth)</li> <li>· Pre- and Postnatal Treatments</li> </ul> <p><b>PRACTITIONERS</b></p> <ul style="list-style-type: none"> <li>· Allergist</li> <li>· Chiropractor</li> <li>· Christian Science Practitioner</li> <li>· Dermatologist</li> <li>· Homeopath</li> <li>· Naturopath*</li> <li>· Optometrist</li> <li>· Osteopath</li> <li>· Physician</li> <li>· Psychiatrist or Psychologist</li> </ul> <p><b>THERAPY</b></p> <ul style="list-style-type: none"> <li>· Alcohol and Drug Addiction</li> <li>· Counseling (not marital or career)</li> <li>· Exercise Programs*</li> <li>· Hypnosis*</li> <li>· Massage*</li> <li>· Occupational</li> <li>· Physical</li> <li>· Smoking Cessation Programs*</li> <li>· Speech</li> <li>· Weight Loss Programs*</li> </ul>
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Please Note: **The IRS will not allow 'OTC medicines or drugs' to be purchased with Health Care FSA or HRA funds unless accompanied by a prescription.** The following is a high level list of Over-the-Counter (OTC) items that clearly are not medicine or drugs and **are eligible** for purchase with Health Care FSA Plans.

<p><b>Antiseptics, Wound Cleansers</b></p> <ul style="list-style-type: none"> <li>· Alcohol, peroxide, Epsom salt,</li> </ul> <p><b>Baby Electrolytes</b></p> <ul style="list-style-type: none"> <li>· Pedialyte, Enfalyte</li> </ul> <p><b>Denture Adhesives, Repair, and Cleansers</b></p> <ul style="list-style-type: none"> <li>· PoliGrip, Benzodent, Efferdent</li> </ul> <p><b>Diabetes Testing and Aids</b></p> <ul style="list-style-type: none"> <li>· Insulin, Ascencia, One Touch, Diabetic Tussin, Insulin syringes; glucose products</li> </ul>	<p><b>Diagnostic Products</b></p> <ul style="list-style-type: none"> <li>· Thermometers, blood pressure monitors, cholesterol testing</li> </ul> <p><b>Elastics/Athletic Treatments</b></p> <ul style="list-style-type: none"> <li>· ACE, Futuro, elastic bandages, braces, hot/cold therapy, orthopedic supports, rib belts</li> </ul> <p><b>Eye Care</b></p> <ul style="list-style-type: none"> <li>· Contact lens care</li> </ul> <p><b>Family Planning</b></p> <ul style="list-style-type: none"> <li>· Pregnancy and ovulation kits</li> </ul>	<p><b>First Aid Dressings and Supplies</b></p> <ul style="list-style-type: none"> <li>· Band Aid, 3M Nexcare, non-sport tapes</li> </ul> <p><b>Hearing Aid/Medical Batteries</b></p> <p><b>Incontinence Products</b></p> <ul style="list-style-type: none"> <li>· Attends, Depend, GoodNites for juvenile incontinence</li> </ul> <p><b>Reading Glasses and Maintenance Accessories</b></p>
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*Note: This list is not meant to be all-inclusive, as other expenses not specifically mentioned may also qualify. Also, expenses marked with an asterisk (\*) are "potentially eligible expenses" that require a Note of Medical Necessity from your health care provider to qualify for reimbursement.*