



## Filing a Claim Online

### Terms and Conditions

*I certify that the expenses submitted for reimbursement qualify for reimbursement under IRS guidelines and have been incurred by me or eligible members of my family. I understand that I am responsible for the validity of claims submitted to my Account, and that these expenses occurred during my coverage period, within the Plan year. Furthermore, I understand that I am responsible for retaining copies of valid receipts for a period of 3 tax years per IRS guidelines. I will provide valid receipts of service where required and authorize the appropriate Account to be reduced by the amounts shown above.*

#### All Claims

- All claims are subject to deadlines and minimum check amounts, as defined in your Summary Plan Description (SPD).
- The amounts submitted cannot have been reimbursed by any other source, and will not be claimed as deductible expenses when filing your personal tax returns.
- 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.
- Call Lifetime Benefit Solutions Customer Service with questions at (800) 327-7130 during standard week-day business hours.

#### Medical Mileage

- 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 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.
- The expenses cannot be for cosmetic or general health purposes, and any products claimed can not constitute toiletries/cosmetics.
- 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.

#### Parking/Transit Claims

- For each claim, attach copies of receipts the showing date, merchant name, amount paid and description.
- Balance bills and cancelled checks are acceptable for Parking and Transit accounts.
- The only type of parking that is eligible for tax-free reimbursement is qualified parking on (or near) the employer's facility, or on (or near) a location from which the employee commutes to work by public transportation. If the parking is on (or near) the employee's residence, it is not eligible for tax-free reimbursement.

#### Dependent Care

- I authorize the above expenses to be reimbursed from my dependent care account.
- I certify the expenses qualify as valid dependent care expenses under the terms of the Plan.
- I understand a qualifying dependent is a child under age 13, who is claimed as a dependent on my federal income tax return (special rules apply for divorced parents), a disabled spouse, and any other dependent on my tax return who resides in my home and is physically or mentally disabled.
- I certify these expenses have not previously been reimbursed and I understand the expenses reimbursed may not be used to claim any federal income tax deduction or credit.
- I agree to file IRS Form 2441 with my tax return and provide any required taxpayer identification number.