

# CLAIM FILING INSTRUCTIONS

**For specific information on the products and services that are eligible under your plan, please refer to your plan documents or contact your Plan Administrator or Employer for information.**

## **Who can file a Claim for Reimbursement?**

- Only the employee participating in the employer sponsored benefit plan can file a claim for reimbursement.
- Employees can file a claim during the current plan year and prior to the end of the run-out period for expenses incurred during the plan year.
- Terminated employees have until the end of the run-out period to submit eligible expenses incurred while employed.

## **What expenses can be claimed?**

- Only expenses for the employee and the employee's dependents (if eligible) incurred during the plan year can be claimed for reimbursement.
- Terminated employees can claim expenses for themselves and their dependents (if eligible) incurred prior to termination and within the plan year.
- Sources to determine eligible expenses are available through the IRS website and your employer plan documents.

## **Completion of the Reimbursement Request form:**

- Complete **a**ll information on the form for each amount claimed for reimbursement.
- Make sure the claim does not include items for more than one plan year. Use different forms for different plan years.
- You **must** sign and date the form.
- Attach itemized receipts or the Explanation of Benefits to support claimed expenses. Please keep a duplicate copy of all records submitted for future reference.

***Note: Cancelled checks, credit card/bankcard receipts, and/or cash register receipts are not acceptable. You must provide an itemized billing statement which includes the name and address of the provider of service, the name of the patient, the beginning and ending date of service, a detailed description of the service, and the charge for each service.***

## **Reimbursement Procedure:**

- Completed Reimbursement Request forms should be mailed or faxed to:  

CareFlex Benefit Solutions  
205 West Dares Beach Road  
Prince Frederick, Maryland 20678  
Fax Number: (410) 414-8432
- Claims will be paid out based on the schedule determined by the employer.

## **How to Request Changes in Plan Participation:**

- Revocation of participation in the Plan can only occur if you have a change in family status or termination of employment. "Change of family status" includes birth, death, marriage, divorce, or change of employment by spouse. Contact your employer with all changes.