

HOW TO GET SPEEDY REIMBURSEMENTS

Fast answers, fast payments, and web self-service.
It's easier than ever to access funds in your eflex pre-tax benefits plan.

Here are a few things you can do to get your money back quickly and easily.

Complete, sign, and date an eflex claim form. If you forget to sign and date the form, we can't process your request because it won't meet IRS regulations. You may find a claim form at www.eflexgroup.com/forms. Be sure to include employee participant's information (first and last name with the last four digits of his/her Social Security Number) on your claim form and all related documentation.

Complete a Direct Deposit form. Direct deposit to your checking or savings account will speed the reimbursement process and save you a trip to the bank. You only need to complete the Direct Deposit form once unless you change banks or account information.

Attach receipts to document the expenses on your claim form:

- **Send an itemized bill or an Explanation of Benefits (EOB) from your insurance carrier.** We can't process your claim from a credit card slip because it doesn't show all of the required information. At a minimum, we need the date of service, a description of the service, the service provider, and the amount charged.
- **Don't send a statement showing "Balance Forward."** The IRS says we need documentation showing the type and nature of service, the date of the service, and the amount of the charge. A balance-forward statement usually shows only the dollar amount so it doesn't meet IRS requirements.



Submit claims for services you receive in the current plan year, not the previous year. Your plan year and the date of the service (not billing date) must coincide. For example, if your plan runs the calendar year (i.e., January through December), services must occur between January 1 and December 31. (If your plan includes the 2.5-month extension, you'll have until March 15.) According to the IRS, eligible expenses are based on the date of service regardless of when you receive or pay the bill.

Use one of four methods to get your reimbursement: 1) Complete our online claim form and scan your documentation; 2) FAX your claim form with documentation; 3) Email your claim form with scanned documentation; or 4) Download and print out our claim form at eflexgroup.com and mail in the form with documentation (Note: this method will take the longest). Don't forget to send all of your items together when possible. If we receive the claim form and documentation separately, there's no guarantee that we'll get them in sequential order or be able to quickly match them up. Because we often receive thousands of claims in a day, you can help expedite the processing of your claim by remembering this one simple step.

Questions about filing a claim or any aspect of your eflex plan?

- Call us at 1.877.933.3539
- Email to CustomerCare@eflexgroup.com
- Chat with the Flexpert at eflexgroup.com

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