

PriorityFSASM Limited Flexible Spending Account



Attention: ASO Flex MS 2260

1231 East Beltline NE • Grand Rapids, MI 49525-4501 • Fax: 616 942-0631 • Toll free fax: 800 541-0985

Section 1 - Employee information			
EMPLOYEE NAME (LAST & FIRST)	EMPLOYEE DATE OF BIRTH	EMPLOYEE TELEPHONE NUMBER	
EMPLOYEE ADDRESS	CITY	STATE	ZIP
EMPLOYER NAME	CONTRACT NUMBER	GROUP NUMBER	

Section 2 - Health care expenses (supporting documentation must be attached)						
Patient name	Relationship to employee	Date of birth	Dates of service		Expense category (see key)	Amount
			From	To		

Key

Expense categories		
Dental	Orthodontia	Pharmacy
Medical	Over-the-counter (OTC)	Vision

TOTAL

For expenses that are payable under any health plan, attach a copy of the Explanation of Benefits (EOB) or any other itemized receipt to this form. Generally, your health/dental plan or any other insurance company should make payment before you request an LFSA reimbursement.

Section 3 - Dependent care expenses (supporting documentation must be attached)					
DEPENDENT CARE PROVIDER INFORMATION	NAME	ADDRESS	TAX ID OR SSN		
Dependent's full name	Relationship to employee	Date of birth	Dates of service		Amount
			From	To	

A receipt is required. Please make sure it includes dependent's name, date or date range of service and the provider's name, address and Tax ID number.

TOTAL

Section 4 - Employee's certification for reimbursement
<p>I certify that the expenses for reimbursement requested from my LFSA were incurred by me (and/or my spouse, and/or eligible dependents) and were not reimbursed/reimbursable by any other plan. To the best of my knowledge and belief, these expenses are eligible for reimbursement under LFSA. I will not use the expenses reimbursed through the LFSA program as deductions or credits when filing my individual income tax return. I certify that any medical or pharmacy (including OTC) expenses submitted under Section 2 were incurred on or after the deductible was met on my or my family's HSA-compatible High Deductible Health Plan (HDHP), if applicable.</p> <p>Any person who knowingly files a statement of claim containing false or misleading information may be guilty of a criminal act punishable under law.</p> <p>EMPLOYEE SIGNATURE REQUIRED FOR PROCESSING</p> <p>Employee signature _____ Date _____</p>



Frequently asked questions and answers



What's an “eligible expense” under my PriorityFSA Limited Flexible Spending Account?

In general, reimbursable expenses include dental, vision and preventive care, along with medical and pharmacy expenses incurred after the High Deductible Health Plan (HDHP) deductible is met are eligible. Some examples include:

- **Dental:** cleanings, fillings, crowns, orthodontics
- **Vision:** contact lenses, eyeglasses, refractions, vision-correction procedures
- **Preventive care:** immunizations or vaccines
- **Medical and pharmacy (including over-the-counter):** coinsurances, copays, and other medical and pharmacy expenses incurred after the HDHP deductible is met

Whose expenses will it cover?

Expenses for you, your spouse and any dependent(s) covered under the **PriorityFSA Limited Flexible Spending Account**.

How are claims for orthodontia expenses reimbursed?

Because orthodontia treatment can span several plan years, claims are reimbursed according to the financial contract/agreement you have with your orthodontist and/or insurance company.

PriorityFSA can pay for orthodontic expenses, including those incurred before services are provided, but only if required by the provider. For example, if you've agreed to pay your orthodontist a portion of the total treatment cost each month, you'll need to submit a copy of the bill each month with your withdrawal request form. Please attach a copy of your contract/agreement to your initial withdrawal request form.

What's an eligible “dependent care” expense under my PriorityFSA?

You may be reimbursed for dependent care expenses for services that enable you and your spouse (if married) to work or to look for work. Expenses may be incurred by:

- Any family member under 13 whom you can claim as a dependent on your federal income tax return
- Any other dependent, including your spouse, who is mentally or physically incapable of caring for themselves

continued >

If my child's 13th birthday is this year, can I use the dependent care account for the entire year?

No. Only expenses you incurred before your dependent child reaches age 13 are eligible for dependent care reimbursement.

Are expenses for care before and/or after school eligible under the dependent care account?

Yes. If a child under 13 receives before- and/or after-school care at school, you must separate the cost of the before- and after-school care from the cost of tuition, if applicable. If this cost isn't available separately, it'll be prorated based on the number of hours your child spends in before- and after-school programs.

Weekly deadline

Withdrawal requests, along with the proper receipts/statements, must be received by 7:00 p.m. on Thursday to be processed the next Sunday. Requests received later than 7:00 p.m. on Thursday will be processed on Sunday of the following week.

How to complete your **PriorityFSASM** limited withdrawal request form

1. Fill out the health care expenses or dependent care expenses portion of the PriorityFSA withdrawal request form (don't forget to sign and date the form).

Health care expenses — sections 1, 2 and 4

Dependent care expense — sections 1, 3 and 4

2. Attach detailed receipt(s).

Health care expenses — Attach the receipt(s) or billing statement(s) with the vendor name, contact information, incurred date, description of the expense(s) and the expense(s) amount. An Explanation of Benefits (EOB) from a medical plan can also be used as documentation.

Prescription expenses — Attach the detailed receipt, not the cash register receipt. If your prescription was filled by Walgreen's mail service, please include the statement showing the fill date, not the shipping date.

Dependent care expenses — Attach your dependent care provider receipt with the

provider name, contact information, your dependent's name(s), dates of care (beginning and end), description of care and the expense amount.

Please save your itemized receipt(s) even if you pay with a credit card or check. A credit card receipt or canceled check won't have enough information to process your claim (see examples below).

Good receipt ►

Michigan Child Care 125 Main Street Anywhere, MI 49432 999 555-2020 Tax ID number: 12 3456789		
Bill for:	Sara Sample 1414 Elm St., Anywhere, MI 49432 Child name: Jeffrey Sample	
Date	Service Type	Amount
January 4-8, 200X	Daily child care, toddler group	\$375.00

Receipt missing information ►

Michigan Child Care 125 Main Street Anywhere, MI 49432 999 555-2020	
Date: 01-08-200x	Time: 05:43 PM
ITEM: 0041 VIS SALE ACCT: XXXXXXXXXXXX9876 AUTH: 9898	
TOTAL	\$375.00
I AGREE TO PAY THE ABOVE AMOUNT ACCORDING TO CARD ISSUER AGREEMENT (MERCHANT AGREEMENT IF CREDIT VOUCHER)	
X _____	

3. Send us the form and the receipt(s) by fax or mail.

Keep your original receipt(s), and send clear copies with your withdrawal request form. Please fax or mail the documents to us. Keep a copy for your records. Please place your documents in this order to avoid delays in processing: 1) **Priority**FSA withdrawal request form; 2) Your receipt(s).

Fax: 616 942-0631 or 800 541-0985

Mail: Priority Health ASO Flex, MS2260, 1231 East Beltline NE, Grand Rapids, MI 49525-4501

Still have questions or need a new form? Call Customer Service at 800 956-1954 or visit our website at priorityhealth.com.

Why providing documents is important

The IRS has strict requirements for expenses reimbursed through a Limited Flexible Spending Account. Your request must be substantiated with itemized receipts or provider acknowledgement. All supporting documents must include the provider name, provider contact information, dependent name(s), service dates (beginning and end), a description of the service(s) and the expense amount(s). Requests submitted without these documents cannot be paid, per IRS regulations. If your claim is declined for incorrect proof of expense, or ineligible, we will notify you by mail.