Claim Documentation

Satisfying IRS Requirements for Successfully Filing your Claim

We understand it can be frustrating to have to provide receipts for your claims. However, as part of allowing the reimbursement plan to provide a pretax benefit, the IRS sets these requirements. Your employer's reimbursement plan must abide by the IRS rules* to maintain its tax-qualified status.

What Documentation is Acceptable?

IRS rules say that your documentation must show:

- The date the service was incurred (not the date you paid the bill)
- The service provider's name
- To whom the service was provided
- The charges or out-of-pocket expense amount
- A clear and detailed description of service or item

Acceptable documentation:

- Insurance company Explanation of Benefit forms (EOBs)
- Receipts from the provider showing ALL of the above information
- "Bag tags" for prescriptions

Unacceptable documentation:

- Bank card statements
- Insurance company claim forms
- Canceled checks
- Estimates of expenses and balance forward statements

How Do I Provide the Documentation?

Mobile app: Try the "TRI-AD Benefits On the Go" Mobile App, available in both the Google Play and iTunes stores for free. Through the app, create a new claim or find the existing claim, snap a picture of the documentation, and upload it on the spot.

Online: After you provide your basic claim information, you can upload your documentation and attach it to your claim. If you don't have a scanner, you can print a special cover sheet and fax it with your documentation to TRI-AD as instructed on the cover sheet.

*https://www.irs.gov/pub/irs-drop/n-06-69.pdf

Contact Information

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