Helpful Hints for Filling Out a Claim Form

1. Identify the documentation for each line in Column A by writing the line number of the claim form on the documentation.

2. Group like expenses (such as RX or office co-pays) for one person on a single line. For these, you can show a date span by indicating the service with the earliest date to the most recent date of expense.

3. Column B must have the “date of service” — this is NOT the date of the bill or the date of payment.

4. Over the counter expenses (OTC) must be described to determine eligibility. If claims examiner does not recognize a product and its purpose, the claim for that expense is denied.

5. Sign and date your claim form —without your signature and date, the entire claim will be DENIED!

6. In place of separate documentation you may use Column F. Ask your day care provider to sign in Column F to certify your expense.

Other suggestions:

♦ Include ONLY one piece of documentation (Explanation of Benefits, itemized bill) for each expense.
♦ Do NOT staple the documentation to the claim form.
♦ Cancelled checks, collection agency letters and credit card receipts are generally not proof of expense.
♦ Be careful using highlighters! Highlighted items that are photocopied usually are not legible which results in a denial of the claim for that item. You may consider circling instead.
♦ When you have completed the claim form and are ready to print, please remember to use the red Print Button at the bottom of the section of the interactive form.