

Supporting Documentation Needed for HRA reimbursement:

Each time you submit claims to your health insurance carrier, you will receive an Explanation of Benefits (EOB), Plan Information Summary or an itemized statement detailing what the health/dental/vision plan will pay and what you must pay. For expenses that are partially covered under another insurance plan, you must attach a copy of both EOBs. All items submitted for reimbursement must have the following information included (This includes Dental/Vision/Prescriptions): **You can create an account at www.umar.com and pull your EOBs.**

- Name of patient
- Name and address of provider
- Description of service
- Date of service
- Amount of service

What Documentation is Not Accepted?

- Credit Card Receipts are not sufficient and cannot be accepted
- Statements with a "Balance Forward" amount-**we need the detail stated above**
- A statement or receipt showing payment only-**we need the detail stated above**

Common Items That Cannot be Reimbursed:

- Pre-Tax Insurance Premiums
- Over-the-Counter medicines, unless prescribed by a doctor

Administration Items:

- Checks are processed on the 10th-12th of every month-I recommend having paperwork in by the **7th** to guarantee payment that month
- The deadline for prior year reimbursements is June 30th of the current year
- You do NOT have to pay the healthcare provider before you request reimbursement
- **Please submit each year on separate claim forms.**

If you have any questions, please call **Holly R. 952-854-0795 or 1-800-535-6373**. If you wish to email items, please send to SCMNEW@wilson-mcshane.com.

Adhering to these guidelines will ensure the timely and accurate processing of checks.

Wilson-McShane address is:

1330 Conway St, Suite 130, St. Paul, MN 55106, email address:SCMNEW@wilson-mcshane.com