



**Town of Westford, MA
HRA Reimbursement Claim Form**

Fax: (603) 647-4668 (Max of 15 pages)
Address: PO Box 1300, Manchester, NH 03105-1300
E-Mail: Flexdept@benstrat.com

Employee Name: _____
(First, Last)

Primary Phone: _____

Email: _____

Last 4 digits of SSN:

| | | | |
|--|--|--|--|
| | | | |
|--|--|--|--|

Employer: Town of Westford, MA

E-mail is required to receive important account notifications.

Fill out form completely, including signature, and fax or mail to Benefit Strategies at the address listed above. Incomplete and unsigned claims will be returned. Please limit the number of pages faxed to a maximum of 15 pages. Reimbursement requests should be for a minimum of \$25 (unless using remaining account balance). Notifications will be sent via e-mail for claim confirmation, payment notification and denial letters. Claims will be applied to the earliest eligible plan year. **Please Note: Legislation recently enacted a law that mandates some OTC expenses will no longer be eligible for reimbursement under health FSA effective January 1, 2011.**

HEALTH REIMBURSEMENT ARRANGEMENT EXPENSES

| Amount To Be Reimbursed | Service Date(s) | Description (See eligible expenses below) | Person receiving product / service |
|-------------------------|-----------------|--|------------------------------------|
| \$ | | <input type="checkbox"/> BCBS Health Insurance—Medical Deductible <input type="checkbox"/> BCBS Health Insurance—Medical Copayments | |
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| \$ | | <input type="checkbox"/> BCBS Health Insurance—Medical Deductible <input type="checkbox"/> BCBS Health Insurance—Medical Copayments | |

\$ _____ **TOTAL Health Reimbursement Arrangement Requested**

READ CAREFULLY: To the best of my knowledge and belief, my statements in this request for reimbursement are complete and true. I am claiming reimbursement only for IRS eligible expenses incurred by my legal dependents or myself (Domestic/Civil Union Partners are *not* IRS eligible dependents in most cases.) I certify that these expenses have not been and will not be reimbursed from any other source and will not be claimed as an income tax deduction.

| | | | |
|--|--|--------------|--|
| EMPLOYEE'S SIGNATURE: (REQUIRED) | | DATE: | |
|--|--|--------------|--|



Did you know that you can....

- File your claim online
- Sign-up for direct deposit online
- Update your account information online

Visit us online at www.benstrat.com



Health Reimbursement Arrangement (HRA) Filing Instructions

Who is eligible?

- An employee who is enrolled in the Plan, and their dependents.

Examples of qualifying expenses

- The Town of Westford's Health Reimbursement Arrangements can be only be used to reimburse for BCBS Health Insurance Copayment and Medical Deductibles.
- Expenses must be incurred on or after your effective date for the plan year and before the end of the plan year (or grace period, if adopted by your employer). In accordance with the IRS rules, reimbursements will not be made until the services have been provided.

Please Note: The above eligibility and expense guidelines are intended for informational purposes only. For a description of how your plan works, please refer to the Summary Plan Description (SPD). The information contained in the SPD takes precedent over the guidelines in this form.

Example Documentation Required:

- BCBS Health Insurance medical copayments or deductible expenses listed on receipt from provider with description of services rendered.
- Receipts for prescription copayments.
- Explanation of Benefit (EOB) statements from BCBS Health Insurance, which show the amount or percentage of a medical charge your insurance company paid and how much you must pay.

Please Note: Some items may require further documentation from your physician or healthcare provider. We will contact you if further documentation is required.

Please Note: Cancelled checks, credit card slips or statements showing only a balance forward are **not** accepted as valid receipts.

*If you have any additional questions regarding your plan please contact us by phone at (603) 647-4666 or (888) 401-FLEX (3539).
Visit us online at www.benstrat.com.*