

# CLEAT HRA MEDICAL CARE EXPENSE CLAIM FORM

Employee Last Name, First	Date of Birth
Street Address, City & State	Zip Code
Phone Number	Social Security Number XXX-XX-_____ Last 4 digits ONLY

TOTAL AMOUNT REQUESTED: \$ \_\_\_\_\_

NOTE: Federal law requires that you submit a written statement (such as an itemized bill from the benefit provider) as well as proof that the claim is not being reimbursed by other coverage. Also, you will not be entitled to claim any reimbursed expenses as a tax deduction.

## READ CAREFULLY

The undersigned participant in the Plan certifies that all expenses for which reimbursement or payment is claimed by submission of this form, were incurred (i.e., services were provided) during a period while the undersigned was covered under the Plan with respect to such expenses and that such expenses have not been reimbursed, or are not reimbursable, under any other health plan coverage. The undersigned fully understands that he or she alone is fully responsible for the sufficiency, accuracy and veracity of all information relating to this claim which is provided by the undersigned, and that unless an expense for which payment or reimbursement is claimed is a proper expense under the Plan, the undersigned may be liable for the payment of all related taxes including federal, state or city income tax on amounts paid from the Plan which relate to such expense. The undersigned further understands that no medical expense tax deduction or credit is permitted for amounts for which reimbursement is made.

By my signature below, I certify the reimbursements I am requesting are not eligible for payment under any other insurance plan.

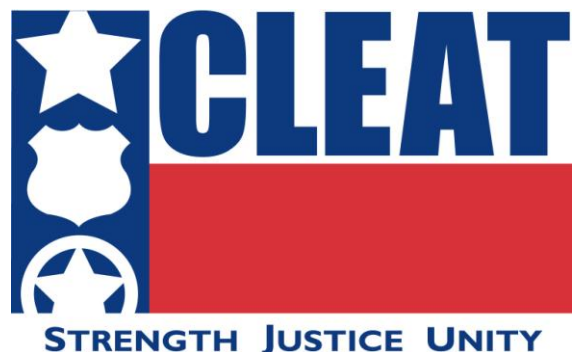
Signature

Date

### TO FILE A HRA CLAIM:

1. COMPLETE THE FORM;
2. ATTACH RECEIPTS;
3. FAX OR MAIL TO:

EMPLOYER PLAN SERVICES, INC.  
2180 NORTH LOOP WEST, SUITE 400  
HOUSTON, TEXAS 77018  
FAX: 713-369-0703  
PHONE: 713-932-8917 OR 800-447-6588



## QUALIFYING MEDICAL CARE EXPENSES

In addition to the limits imposed by the Plan on the amount and types of expenses that may be reimbursed, the law only permits reimbursement for those types of medical expenses normally deductible on your federal income tax return (without regard to the 7.5% of adjusted gross income limitation). They include, for example, expenses you have incurred for:

1. Medicine, drugs, birth control pills and vaccines that your doctor prescribed.
2. Medical doctors, dentists, eye doctors, chiropractors, osteopaths, podiatrists, psychiatrists, psychologists, physical therapists, acupuncturists and psychoanalysts (medical care only).
3. Medical examination, X-ray and laboratory service, insulin treatment and whirlpool baths the doctor prescribed.
4. Nursing help. If you pay someone to do both nursing and housework, you can be reimbursed only for the cost of the nursing help.
5. Hospital care (including meals and lodging), clinic costs and lab fees.
6. Medical treatment at a center for substance abuse.
7. Medical aids such as hearing aids (and batteries), false teeth, eyeglasses, contact lenses, braces, orthopedic shoes, crutches, wheelchairs, guide dogs and the cost of maintaining them.
8. Ambulance service and certain other travel costs to get medical care.

### **You cannot obtain reimbursement for:**

1. Life insurance or income protection policies.
2. The hospital insurance benefits tax withheld from your pay as part of the Social Security tax or paid as part of Social Security self-employment tax.
3. Nursing care for a healthy baby.
4. Illegal operations or drugs.
5. Travel your doctor told you to take for rest or change.
6. Cosmetic surgery.
7. Long-term care expenses.

Qualifying medical expenses generally only include those expenses incurred for:

1. Yourself.
2. Your spouse.
3. All dependents you list on your federal tax return.

IRS Publication 502, Medical and Dental Expenses, has a checklist of most of the medical expenses that can be deducted and are therefore reimbursed under this Plan. Some other medical expenses are also reimbursable. However, regardless of any statements in Publication 502 to the contrary, expenses under this Plan are treated as being “incurred” when you are provided with the care that gives rise to the expenses, not when you are formally billed or charged, or you pay for the medical care.

Women's Health and Cancer Rights: Did you know that your plan, as required by the Women's Health and Cancer Rights Act of 1998, provides benefits for mastectomy-related services including reconstruction and surgery to achieve symmetry between the breasts, prostheses, and complications resulting from a mastectomy (including lymphedema). Contact your Plan Administrator for more information.