

## Claim Form

(Instructions on next page)



### Employee Information

Last Name, First Name	SSN / Employee ID #
Home Address (Street, City, State, Zip Code) <input type="checkbox"/> Please update my address on file	Phone Number
Employer Name	Email Address

**Did you know you can submit paperless claims online or via the MyNavia mobile app?  
Just take a picture and submit!**

### Day Care FSA Expenses

Service Date(s)	Type of Service	Provider's Name, Tax ID and/or SSN	Services For Whom	Age	Net Cost
Total Reimbursement Request \$ _____					
Day Care Provider Certification: I certify that dependent care services were provided as indicated above.					
Provider/Facility Name: _____		Provider's Signature X _____			
Signer's Name (Printed): _____		Date: _____			

### Health Care/Limited FSA/HRA/Wellness Expenses

Service Date(s)	Type of Service	Provider's Name	Services For Whom	Net Cost
Total Reimbursement Request \$ _____				

### Signature

To the best of my knowledge my statements on this claim form are complete and true. I understand that I am solely responsible for the sufficiency, accuracy, and veracity of claims and all information related to these claims submitted to my HRA, Health Care ("HCFA") or Day Care Flexible Spending Arrangement ("DCFA"), and that unless an expense for which payment or reimbursement is claimed is a proper expense under the HRA, HCFA or DCFA, I may be liable for the payment of all related taxes including federal, state or city income tax on amounts paid from the HRA, HCFA or DCFA which relate to such expense. I further understand that no day care tax credit is permitted for amounts for which reimbursement is made. I am claiming health care reimbursement for eligible medical care expenses incurred by myself, spouse and/or dependents. Note: The IRS does not recognize Domestic Partners for purposes of receiving tax-favored health benefits. For further information, please contact your employer. I certify that these expenses have not been reimbursed under this plan or by any other source and that they will not be reimbursed by any other source or insurance. By providing an email address, I consent to receive all possible communications from Navia Benefit Solutions, agents, and subcontractors regarding the Plan via email. I may withdraw consent at any time without charge by contacting Navia by phone, email, or mail. To update your email address contact Navia Benefit Solutions by phone, email, or mail. You have the right to receive paper version of an electronic document free of charge. Software requirements will be provided with each electronic document. I hereby authorize my HRA, HCFA and/or DCFA to be reduced by the amount(s) shown above.

Participant's Signature

X \_\_\_\_\_

Date \_\_\_\_\_

## Claim Form Instructions

1. Complete employee information section. Be sure to write legibly to ensure proper processing.
2. Itemize your expenses in the table provided and attach copies of your documentation.

Documentation must clearly show the date of service, type of service, and final cost of service. Examples of acceptable documentation include itemized bills/invoices, or the Explanation of Benefits (EOB) from your insurance carrier.

- ❖ If your employer offers an HRA and you are enrolled in a plan that only offers reimbursement for deductible, coinsurance, and/or copays an EOB is required for claim submission.
- ❖ If the expense is a copay amount (multiple of \$5 up to \$500), a payment receipt is acceptable documentation.

Proof of payment is not required in order to reimburse medical/dental/vision services.

### **Prescriptions**

Examples of acceptable documentation include the Rx label, payment receipt, or mail order statement showing the date filled, Rx name or Rx #, and cost. You may also submit an itemized printout from your pharmacy.

### **OTC Medications & Drugs**

Per IRS regulations, OTC medications and drugs with an active ingredient are eligible expenses that can be reimbursed with your FSA (ex. pain relievers, cold/allergy medication, ointments, Antacids).

### **Alternative Treatments**

Expenses that may be seen as merely beneficial to general health will require a Letter of Medical Necessity (LMN), showing the treatment of a specified medical diagnosis. Examples include vitamins/supplements, herbs, weight loss programs, cosmetic products and procedures. Please have your provider write a letter or complete our [Letter of Medical Necessity template](#).

### **Dependent Care**

Acceptable documentation includes an itemized bill/invoice, showing the date of service, type of service, and cost of service.

If the dependent is age 5 or older, the documentation must show the services are "for care," and not educational in nature.

If you are unable to obtain sufficient documentation, you may have the provider sign the front of this claim form to validate the services being claimed.

If you would like to automate your recurring daycare expenses, you may do so by completing our [Recurring Daycare Claim Form](#), logging onto our Participant Portal, and selecting the My Recurring Claims tool tile.

Please **DO NOT** submit the following types of documentation:

- ❖ Statements showing estimated/pending insurance
- ❖ Statements showing the claimed amount as a balance forward/previous balance
- ❖ Statements showing the claimed amount as a prepayment for future services
- ❖ Cancelled checks/copies of cashed checks
- ❖ Personal bank statements

3. Be sure to sign the claim form and submit! Please fax, email or mail a signed claim form, but choose one method only.

#### **General Claims Submittal:**

Email: [claims@naviabenefits.com](mailto:claims@naviabenefits.com)  
Fax: Local (425) 451-7002 or Toll-free (866) 535-9227  
Mail: Navia Benefit Solutions  
PO Box 5179 Fresno, CA 93755  
Phone: Local (425) 452-3500 or Toll-free (800) 669-3539

#### **If your employer offers an HRA, Dental or Wellness plan, submit to:**

Email: [105@naviabenefits.com](mailto:105@naviabenefits.com)  
Fax: Local (425) 709-7125 or Toll-free (866) 831-6222  
Mail: Navia Benefit Solutions  
PO Box 5179 Fresno, CA 93755  
Phone: Local (425) 452-3421 or Toll-free (866) 897-1996

Claims status is available [online](#). Please allow at least two (2) full business days for Navia to process your claim.