

Claim & Card Use Verification Documentation Checklist

Make Sure Your Claim Is Approved by Following These Simple Steps

The #1 reason a claim, a payment request, or a Card Use Verification is not approved is because of illegible or incomplete documentation. Use this documentation checklist and submission tips to ensure your request is processed promptly.

Documentation Checklist

All documentation MUST include these five key pieces of information:

- Provider's Name—Facility name or person who provided the service, or if a purchase, where item was purchased (e.g. hospital, doctor, pharmacy).
- Service Date(s)—Date services occurred or date item was purchased.
- Patient's Name*—Person who received the service or whom the item is for.
- Type of Service—Detailed description of the service provided or item purchased.
- Amount Billed—The amount charged for services or product and/or the portion not reimbursed by your insurance carrier.

Helpful Tips for Submitting Documentation

- Use your Explanation of Benefits (EOBs), especially if your insurance paid a portion of the expense.
- Make sure documentation is legible; check that it isn't too dark or light and that information is not cut off.
- Do not use highlighters on documentation.
- Handwritten documentation must include stamped provider information.
- Do not send carbon copies or cancelled checks, they typically do not include all five key pieces of information.

How to Submit Claims/Documentation

- Online—log in to your account at takecareWageWorks.com.
- MyFlex_{sm} Mobile app—use this free app to take photos of receipts and upload.
- Please refer to your Healthcare or Dependent Care claim form, or Card Use Verification form for the fax number or mailing address to submit your form. Forms are available on our website, takecareWageWorks.com.

To ensure that you are receiving timely notification regarding your claims and card use verifications, please confirm that we have your correct email address on file. Log in to your account at takecareWageWorks.com to verify your contact information and review important information. Refer to the table below for timing of messages you'll receive as well as processing times.

Claims Processing and Card Use Verification Notifications

Event	Sent	Message
Claim Processed	Within 1-2 business days of receipt of claim.	Review of claim is complete. You can log in to your account at takecareWageWorks.com to view claim status.
Notification that Card Use Verification is needed.	5 (or 20) days after the purchase date.	Documentation is needed to verify the card payment was for an eligible expense.
Card Use Verification processed	Within 1-2 business days of receipt of Card Use Documentation.	Status of documentation submission (Card Verification Form.) You can log in to your account at takecareWageWorks.com to view status.

* Requests for Over-the-Counter medicines do not require the patient's name, but do require a prescription.