

Under Internal Revenue Service (IRS) rules, some health care services and products are only eligible for reimbursement from a health care account when your doctor or other licensed health care provider certifies that they are medically necessary. Your Spending Account™ has developed this form to assist you and your health care provider in providing this information. As an alternative, your provider may also write a letter or prescription, as long as it includes all requirements outlined below.

Dual Purpose Items

When a health care service or product can be used for both medical and general health reasons, it is referred to as “dual purpose”. For these items, you must provide additional information to confirm the expense is medically necessary.

Examples of Items Requiring a Statement of Medical Necessity:

- Automobile Modifications
- Braille Books and Magazines
- Cosmetic Surgery
- Dental Implants
- Exercise Equipment
- Humidifiers
- Lodging
- Massage Therapy
- Mattresses
- Prescribed Food
- Sunglasses
- Support Hose
- Tutoring
- Umbilical Cord Storage
- Vacuums
- Weight Loss Programs
- Wigs

**Note that for over-the-counter medicines purchased after December 31, 2010, you must provide a prescription from an authorized health care provider – the Statement of Medical Necessity may not be substituted for a prescription.*

A complete listing of eligible expenses and documentation requirements can be found on the YSA Web site. All items requiring additional documentation, including dual purpose items, can be identified by a “?” on the list of eligible expenses.

Requirements

The Statement of Medical Necessity Form was created to capture all required information needed to prove a product or service is medically necessary.

The following information is required:

- Patient Name
- Specific Diagnosis, Diagnosis Code (ICD-9), or Medical Condition
- Specific Length of Treatment (including a begin and end date)
- Name of particular product or service being prescribed
- Medical provider’s signature
- Date (must be in the current calendar year)
- Statement that the product or service is medically necessary and not for general health or cosmetic purposes

If you choose to have your provider write a letter, it must be on the provider’s letterhead and include the information provided above.

YOUR spending ACCOUNT™

STATEMENT OF MEDICAL NECESSITY FORM

P.O. Box 785040
Orlando, FL 32878-5040
Fax: 1-888-211-9900

Account Holder Information

First Name

MI

Last Name

(____) _____
Daytime Phone Number

Employee ID (Optional)

Employer

Instructions

To have your claim approved, you must submit 1) this completed form, 2) a claim form, and 3) a detailed receipt or Explanation of Benefits from your Medical Insurance Provider. Once received, Your Spending Account will typically process your claim within ten days.

Sending Your Claim to Your Spending Account™

Fax: 1-888-211-9900

Mail: Your Spending Account™

P.O. Box 785040

Orlando, FL 32878-5040

If faxing, be sure to place the claim form before your itemized receipts and Statement of Medical Necessity.

To Be Completed By A Licensed Practioner

Patient Name

Diagnosis, Diagnosis Code (ICD-9), or Specific Medical Condition

____/____/____ to ____/____/____

Length of Recommended Treatment (MM/DD/YYYY)—may not extend beyond the current plan year or 12 months whichever is less.

“To present” and “indefinitely” will not be accepted, as they are not definitive dates.

Specific Product or Service Used to Treat Diagnosis—please list each item separately (Note: OTC medicines and drugs purchased after 12/31/2010 require a prescription)

*Your Spending Account's role is to confirm the proper documentation is submitted for reimbursement under the Plan and is not to determine whether the treatment prescribed by your health provider is medically necessary. The form will be reviewed for completeness only.

Licensed Practioner Certification

By my signature below, I certify that this service or product is medically necessary to treat the medical condition described above and is not in any way for general health or cosmetic purposes.

Provider Signature

Date

Employee Certification

By my signature below, I certify that:

- The primary reason for this expense is to treat the medical condition above, and
- I would not incur this expense but for the medical condition

Employee Signature

Date