Helpful Hints for Successful Claim Filing

Submit the following documents with a **signed and dated claim form** (go here for claim form: [https://mybenefits.conexis.com](https://mybenefits.conexis.com)) or when CONEXIS requests documentation for a debit card purchase:

1. Expenses covered by insurance:
   
   a. An Explanation of Benefits (EOB) from insurance carrier such as Blue Cross and Delta Dental showing date of service and out-of-pocket expense(s). If the EOB indicates procedure is not covered, you may be required to submit an itemized statement from the provider (see #2 below).

   b. Copay receipt from physician, usually from HMOs and VSP, showing:
      - patient’s name
      - date(s) of service
      - provider name
      - copay amount.

2. Expenses NOT covered by insurance; an itemized statement from the service provider with the following information:
   
   a. patient’s name
   b. date of service
   c. procedure description
   d. provider name
   e. charge for the service
   f. In some cases, a Medical Necessity form, completed by a medical practitioner

3. Prescription drugs; pharmacy statement (not the credit card or cash register receipt) including:
   
   a. name of pharmacy
   b. patient’s name
   c. date of fill
   d. cost
   e. Rx number
   f. name of drug

4. Over-the-counter medications; an itemized cash register receipt (this is the **ONLY** time a cash register receipt is okay) with:
   
   a. name of medication /item
   b. purchase date

   **Do Not Use a Highlighter** on receipt as it blacks out the text when faxed; circle or underline instead.

🚫 **NOT acceptable documents:**

- account balance statements
- balance forward statements
- cancelled checks
- cash register receipts (see above for eligible over-the-counter medications)
- credit card receipts

**Eligible Expenses:** [http://www.conexis.org/solutions/expenses_EE.asp](http://www.conexis.org/solutions/expenses_EE.asp)