

RECEIPT

Ultimate RECEIPT GUIDE

Best Practices to Avoid Receipt Requests

tip

1

BUY WHERE THERE'S REAL-TIME SUBSTANTIATION

Double check the list of IAS stores to know if where you're shopping provides the benefit of auto-substantiation.

PRO TIP: IAS systems are most common at nationwide stores.

tip

2

KEEP IT EASY WITH RECURRING EXPENSES

Do you pay for the same eligible services at the same provider, for the same amount on a recurring basis? Submit receipts and documents to substantiate these charges once, and you should be good to go!

tip

3

GATHER THE NEEDED INFO FOR THE PERFECT RECEIPT

Want your receipt accepted 100% of the time? This is what you need.

For health care expenses:

- A copy of your Explanation of Benefits (EOB) typically contains all the required information.
- You can generally access this information from your health plan login site if a copy is not automatically mailed to you.
- Alternatively, you can request a detailed statement from your health care provider.
- For prescription expenses, an itemized receipt is typically included with your drug information details. The itemized receipt will include the drug name.

PRO TIP: A standard credit card receipt doesn't typically provide the detail required to verify the expense.



WHO received care?

WHERE was the service provided?

WHAT service was provided?

WHEN did the service take place?

HOW much was the service/item?

