

FSA reimbursement tips and reminders



How to access your flexible spending account (FSA) funds

Payment card

You may use your Optum Financial payment card for eligible expenses anywhere that the card is accepted.

Claims reimbursement options

There are two methods for submitting a request for reimbursement:

1. **Online:** Go to **"File a Claim"**. This process can also be completed on the Optum Financial mobile app.
2. **Paper:** Print and fill out the **"FSA Reimbursement Request Form"** located in the **"Tools & Support"** section. You can fax or mail the form, along with the supporting documentation, to the contact information provided on the form.

Important receipt reminders: What qualifies as documentation to substantiate a claim?

Recommended: An explanation of Benefits (EOB) statement from your insurance company

Additional options: An itemized statement or a detailed receipt containing:

- Merchant or provider name
- Description of service or product
- Patient name (if applicable)
- Amount you were required to pay
- Date of service



Remember to submit your documentation

To ensure that you're receiving these reminder emails, please make sure that your user profile and email address are up to date and that your notification preferences are set up appropriately.

If you have any questions about managing your FSA or limited purpose FSA, please call **1-877-470-1771** to speak with an highly trained account representative 24/7. You may also sign in to your account at **optumfinancial.com**.



Flexible spending accounts/arrangements (FSAs) and health reimbursement arrangements (HRAs) are administered on behalf of your plan sponsor by Optum Financial, Inc. and are subject to eligibility and restrictions. Please contact a legal or tax professional for advice on eligibility, tax treatment, and restrictions. The content of this communication is not intended as legal or tax advice. Please contact your plan administrator with questions about enrollment or plan restrictions. Federal and state laws and regulations and the design of your plan are subject to change.