



Letter of Medical Necessity Form

Form Instructions: Under Internal Revenue Service (IRS) rules, certain expenses are eligible for health care account reimbursement only when accompanied by a Letter of Medical Necessity. When required, submit this completed form with your claim submission as additional documentation. **Please keep a copy of all submitted documents for your records.**

Note: If a claim requires a Letter of Medical Necessity, the claim will not be paid until the Letter of Medical Necessity Form and any required supporting documentation is received. An updated Letter of Medical Necessity is required each year. This form is valid for one year from the date of signature. This form is subject to review and does not have guaranteed approval.

Do not use this form for over-the-counter medications; a physician's prescription is required. Over-the-counter medications will not be eligible for health care account reimbursement unless prescribed by a physician. This change is in accordance with the Patient Protection and Affordable Care Act. To be reimbursed for over-the-counter medications, a valid prescription is required to be submitted along with the claim.

Account Holder Name

Patient Name (if different from Account Holder Name)

To be completed by physician:

Describe the diagnosed medical condition being treated: _____

Describe the required treatment: _____

This treatment is medically necessary to treat the specific medical condition noted above. This treatment is not in any way for general health; and is not for cosmetic purposes to improve appearance.

Provider Signature

Date

Provider Name (Please Print)

Provider License #

Provider Telephone Number

How to Submit: Account holder should include this completed form with claim request, using your preferred claim submission method (online, mobile, or fax).