MEDICAL SPENDING ACCOUNT (MSA)

Each time you use your card, ask the provider for an itemized statement of service that includes:

- 1. Provider name and address;
- 2. Patient name;
- Date the service/supply was provided (regardless when paid or billed);
- 4. Description of the service/supply; and
- 5. Dollar amount you owe.

IRS regulations require you provide an itemized statement upon request. Submit online, via the mobile app, by fax or mail. Retain a copy with your personal tax records.

Note: Do not send the card terminal receipts, balance-forward or paid-on-account statement; these are not sufficient for IRS documentation.

CONTACT INFORMATION

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