Orthodontia Claims

Reimbursement options

If orthodontia is an eligible expense for your plan, you can be reimbursed for the portion of orthodontia expenses that are not covered by your insurance. First, pay for orthodontic services out-of-pocket, then follow these instructions to be reimbursed from your HealthEquity account.



Two types of documentation



1. Itemized receipt – If you have already paid for a service, it's easiest to submit an itemized receipt and request reimbursement.

Your itemized receipt must include:

- Provider name
- Description of services (Orthodontia treatment, braces, retainer, Invisalign etc.)
- Date of service (Date paid is considered the date of service)
- Patient
- Amount paid

Please note: A signed and completed claim form is required if you do not submit your claim electronically.



Contract – If you would like to set up automatic reimbursements, it's easiest to submit a contract showing your planned payments.

Your contract must include:

- Patient name
- Total contracted amount
- Monthly installment amount
- Beginning and end date of treatment
- Estimated insurance payments (if applicable)
- Initial or down payment amount (if applicable)

Please note: If you cannot submit an itemized receipt, you must include a copy of your orthodontia contract with your first orthodontia reimbursement claim. When requesting reimbursement using only the contract and claim form, the payable amount must match the monthly installment amount outlined in your contract.



Four easy ways to submit your contract:

Mail:

HealthEquity claims 15 West Scenic Pointe Drive Draper, UT 84020

Email:

reimbursementaccounts@ healthequity.com

Scan and upload:

to 'Documentation Library' by logging in to My.HealthEquity. com and selecting 'Receipts & Documentation' from the 'Docs & Forms' menu

Fax:

801.999.7829

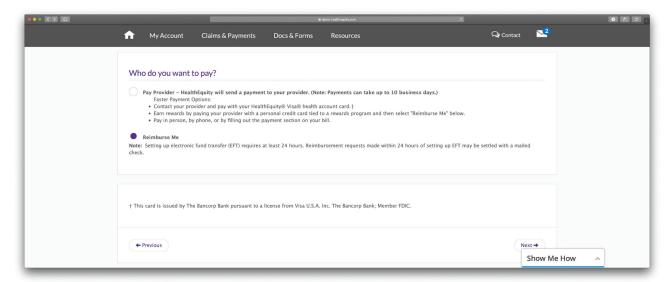
Two ways to be reimbursed

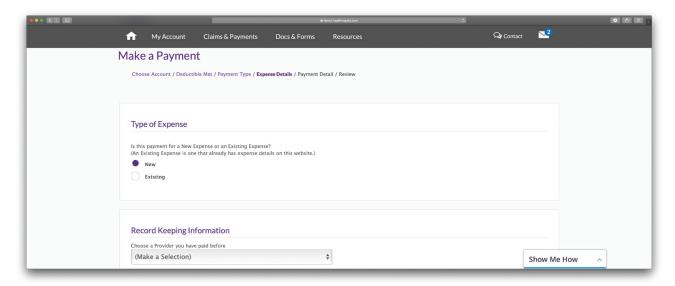
1. Manual reimbursement: You can submit a reimbursement claim after each monthly payment or after a lump-sum payment. Please note that the date of payment is considered the date of service.

How to: Log in to the HealthEquity Member Portal at My.HealthEquity.com and select 'Request Reimbursement' from the 'Claims & Payments' menu, or fill out the 'Orthodontia Reimbursement Form' by selecting 'General Forms' from the 'Docs & Forms' menu.

- Include a copy of your orthodontic treatment plan and/or payment arrangement contract with theorthodontist with your first request for orthodontia reimbursement.
- All requests for reimbursement must include proof of payment.
- Any past payments must include a payment receipt that matches the contracted amount or an itemized receipt indicating the expense was for orthodontic treatment/services.

include a copy of your orthodontia contract with your first orthodontia reimbursement claim. When requesting reimbursement using only the contract and claim form, the payable amount must match the monthly installment amount outlined in your contract.

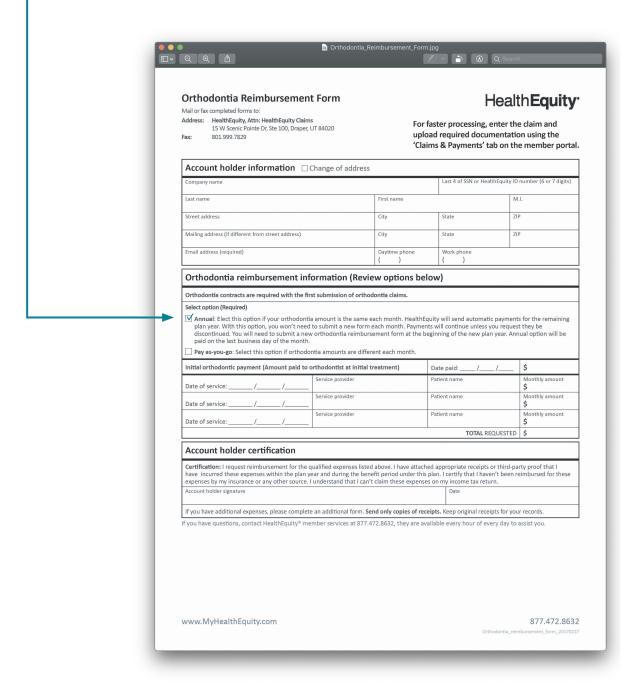




2. Auto-pay: You can set up recurring reimbursements that follow the schedule of payments specified in your contract.

How to: Select 'Annual' on the 'Orthodontia Reimbursement Form,' which can be located through the HealthEquity Member Portal by selecting 'General Forms' from the 'Docs & Forms' menu.

- Automatic reimbursements will occur throughout the rest of the year without needing to submit new requests. The
 reimbursements will follow the same payment schedule dictated by your contract. You can request that automatic
 payments stop at any time.
- At the beginning of the new plan year, you need to submit a new orthodontia reimbursement form. You can only set up auto-pay by completing this form.



Helpful reminders

Reimbursements can only be paid using funds for the plan year in which payments are made. Additionally, you can only be reimbursed up to the total amount elected for that given year.

- If orthodontia services continue into the following plan year, you can be reimbursed for payments made for services the following year.
- Date paid is considered the date of service.
- Orthodontia includes Invisalign.
- This information is intended for general use only. Each reimbursement request is reviewed for eligibility.

Initial fees and down payments

Initial evaluation fees: Initial orthodontic services such as moldings, diagnostic records fees, consultation fees, etc., are reimbursable, even if the expenses are separate from the contracted treatment. An itemized receipt with all required information is acceptable documentation. Fees for appliances, such as mouth retainers, which are not included in the contract are also eligible for reimbursement.

Initial fee or down payment: Providers often require an initial fee or down payment before the start of orthodontia treatment. This expense is eligible for reimbursement with a contract and receipt of payment or itemized receipt specifying it is for orthodontic treatment.



Need help?

For answers to your questions, log in to your account and look for the chat icon, or contact our Member Service team 24/7 at

866.346.5800 | my.HealthEquity.com