



PO BOX 8022
Wausau, WI 54402-8022

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ROBERT PLOCK
6827 LATTA PKWY
DALLAS, TX 75227

Statement Notice

Dear ROBERT PLOCK:

Thank you for participating in your employer's Flexible Spending Account benefit option. This letter provides you information about any card transactions that require documentation or repayment as well as information about documentation you recently submitted.

As the administrator of this benefit, UMR is required to verify that expenses reimbursed from this account meet the IRS criteria as an eligible health care expense. If requested below, please provide UMR a copy of your explanation of benefits (EOB) or an itemized statement for this expense once it has been processed by your insurance carrier (if applicable). Acceptable documentation must include the following information:

- Date the expense was incurred
- Detailed description of the type of expense
- Member out-of-pocket responsibilities after any insurance payment(s) or write-off(s) were applied (if applicable)
- Merchant/provider name
- A letter of medical necessity, if requested by UMR

Credit card receipts, balance due statements, cancelled checks and "estimated" insurance references are NOT acceptable forms of documentation. If the documentation submitted contains information that clearly shows the transaction is not an eligible 213(d) expense, per the federal tax codes your debit card will be temporarily deactivated. The IRS requires all transactions have appropriate documentation as proof that the expense was for a qualified FSA expense and incurred within your coverage period, as defined by your employer's plan document.

Documentation can be faxed to 1-866-881-1200, emailed to umr-fsa@umr.com or mailed to the address listed below. We ask that you include a copy of this letter with your documentation and/or repayment. In an overpayment situation, include the documentation and this letter along with a personal check or money order made payable to UMR.

UMR
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Unresolved transactions will be considered improper and these amounts will be applied against future eligible expenses as they are submitted. Debit card transaction disputes must be received within 90 days of the transaction date. If you have any questions, please contact UMR customer service at 1-866-868-0145. Remember to save copies of all receipts for expenses reimbursed from your FSA and to monitor your debit card activity frequently online at umr.com to identify other expenses that may require your assistance with substantiation.