

Verification Requirements



The IRS requires that pre-tax benefit account funds be used for eligible expenses only. TASC helps with this requirement by sending you email reminders or in-app notifications to submit required verification for your transactions.

If you receive direction from TASC that you need to submit required documentation to verify a purchase or reimbursement request, follow the steps to the right.

You will need to submit an itemized receipt or statement from the provider or merchant or an explanation of benefits (EOB) from your insurance carrier that shows the following information:

1. Sign into MyTASC or open the TASC mobile app and go to TRANSACTIONS.
2. Filter by date and benefit account or scroll through the list. Transactions needing verification will have an ATTACH VERIFICATION button; click or tap the button.
3. Take a photo of your receipt or other documentation (*Mobile*), upload a file from your computer (*Web*) or attach an image from Bills and Receipts (*Web or Mobile*), then click or tap DONE.

- 1 The name of the person who incurred the expense.** This is you, or it may be your spouse or a dependent.
- 2 The expense date.** This is generally the date the service was provided. That date may also be when the expense was incurred, or the date you paid for the service, but not necessarily. See below:

EXAMPLE 1: You picked up a prescription and paid in cash.

✔ That's the expense date.

EXAMPLE 2: Following an appointment, you paid a copay using a credit or debit card.

✔ The service was provided that same day, so that's also the expense date.

EXAMPLE 3: Your provider sent you an email with an invoice attached and you made a payment on their website.

✘ The service date on the invoice is the expense date, not the date you made the online payment.

EXAMPLE 4: You received a bill in the mail for a hospital visit and mailed a check back to the billing department.

✘ The date of your hospital visit was the expense date, not the billing date or the date you wrote the check.

- 3 The expense type.** A description of the service provided or the items purchased. Credit card slips may not have this information, so ask for an itemized statement if that's the case.
- 4 The name of the provider or merchant.** It's rare not to find this on a receipt, but it happens. And an EOB might show a different name than you included with your reimbursement request, like the doctor's name rather than the hospital's.
- 5 The expense amount.** Your out-of-pocket cost or the amount owed after insurance. Ideally, this will be the same as your reimbursement request amount. If it's not, you may need to show your calculations.

Note on Mobile Screenshots

These sure are convenient, but we often find they're missing one or more of the required details. For instance, even if it includes a well-known merchant's logo, we can't accept that in place of the name for verification purposes. Be sure to check that your screenshot includes all five things!

