

HOW TO SUBSTANTIATE A CLAIM - Overview

PRESENTED BY:
THE HARRISON GROUP, INC.



Notification of Need to Substantiate

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1. VIA EMAIL

If a debit card transaction requires further substantiation (or documentation), you will receive an email that looks like this picture.

The email will include information about the claim, date of claim, and claim amount.

The Harrison Group, Inc.
3 Raymond Drive
Suite 201
Havertown, PA 19083

Email

Employer Name: Goodville Mutual Casualty Company
Employer Code: GOC
Participant Account ID: [REDACTED]
Date: 5/9/2024

First Receipt Request

Dear [REDACTED],

Thank you for using your HG Advantage Card! In order to comply with IRS regulations, we are requesting additional documentation to perform a review of the card transaction(s). The password to access this request will be the last four digits of your debit card. Please log into your account to see the item(s) for where we need backup.

When you are ready to submit the backup for the expense, you may submit a receipt/EOB one of four ways:

1. Via upload to our website
2. Fax to (610) 853-9079
3. Email to service@theharrisingrouponline.com
4. Mail to our office with this email:

The Harrison Group, Inc.
Claims Department
3 Raymond Drive, Suite 201
Havertown, PA 19083

If you have any questions, please contact us by email at service@theharrisingrouponline.com or by phone at (610) 853-9075.

Sincerely,
The Harrison Group, Inc.
Claims Department

Claim No.	Plan Name	Transaction Date	Merchant	Claim Amount	Amount Due
	Healthcare FSA 2024			\$20.00	\$0.00

CONTACT INFORMATION

The Harrison Group, Inc.
Customer Service
3 Raymond Drive
Suite 201
Havertown, PA 19083

Phone Number: 610-853-9075
Fax Number: 610-853-9079
Toll Free Number: 855-222-5727
Email Address: service@theharrisingrouponline.com

4 ways to submit documentation

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There are 4 ways to submit the backup information to our office:

1. UPLOAD TO THE PORTAL
2. FAX to **610.853.9079**
3. EMAIL to service@theharrisingrouponline.com
4. MAIL via US Postal Service to our address:
The Harrison Group, Inc.
Claims Department
3 Raymond Drive, Suite 201
Havertown, PA 19083

The Harrison Group, Inc.
3 Raymond Drive
Suite 201
Havertown, PA 19083

Email

Employer Name: Goodville Mutual Casualty Company
Employer Code: GOC
Participant Account ID:
Date: 5/9/2024

First Receipt Request

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Claims Department

Claim No.	Plan Name	Transaction Date	Merchant	Claim Amount	Amount Due
	Healthcare FSA 2024			\$20.00	\$0.00

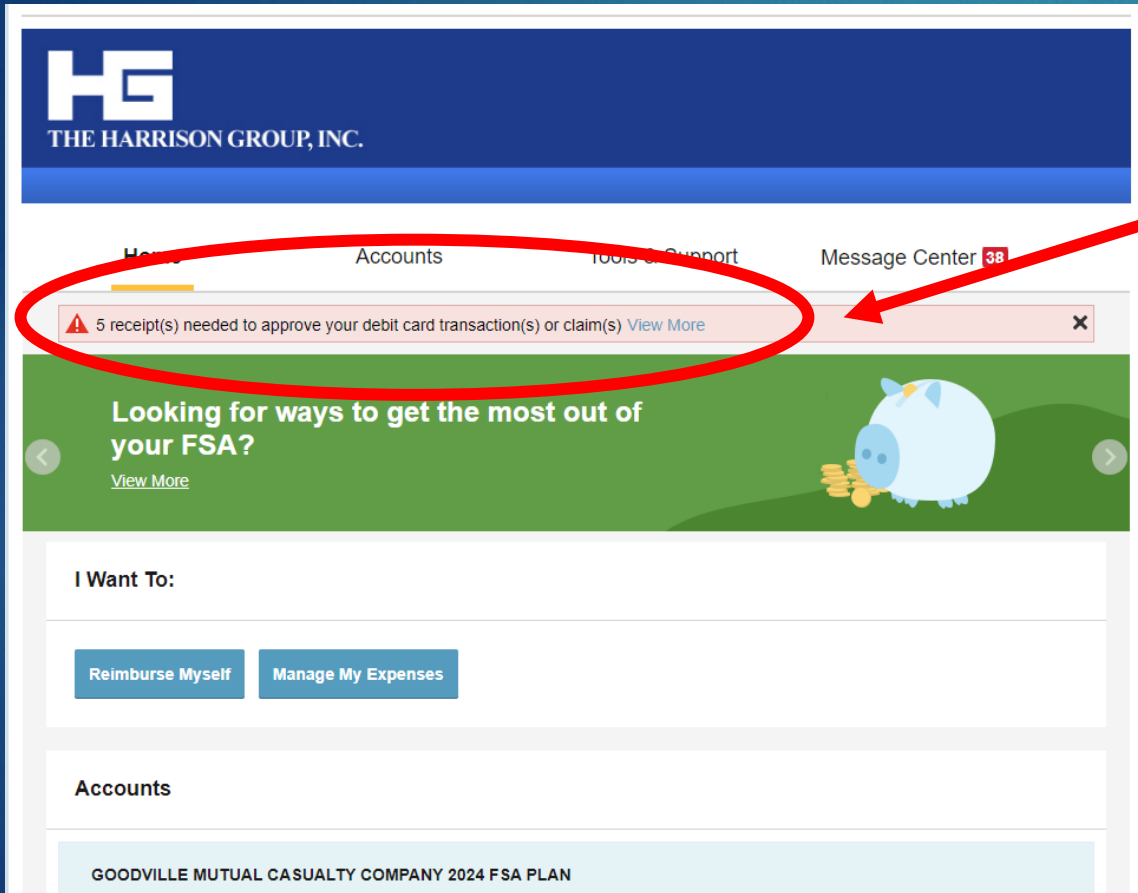
CONTACT INFORMATION

The Harrison Group, Inc.
Customer Service
3 Raymond Drive
Suite 201
Havertown, PA 19083

Phone Number: 610-853-9075
Fax Number: 610-853-9079
Toll Free Number: 855-222-5727
Email Address: service@theharrisingrouponline.com

Notification of Need to Substantiate

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2. VIA PORTAL ALERT

If a debit card transaction requires further substantiation (or documentation), you will also receive an alert on your portal at the top of the screen.

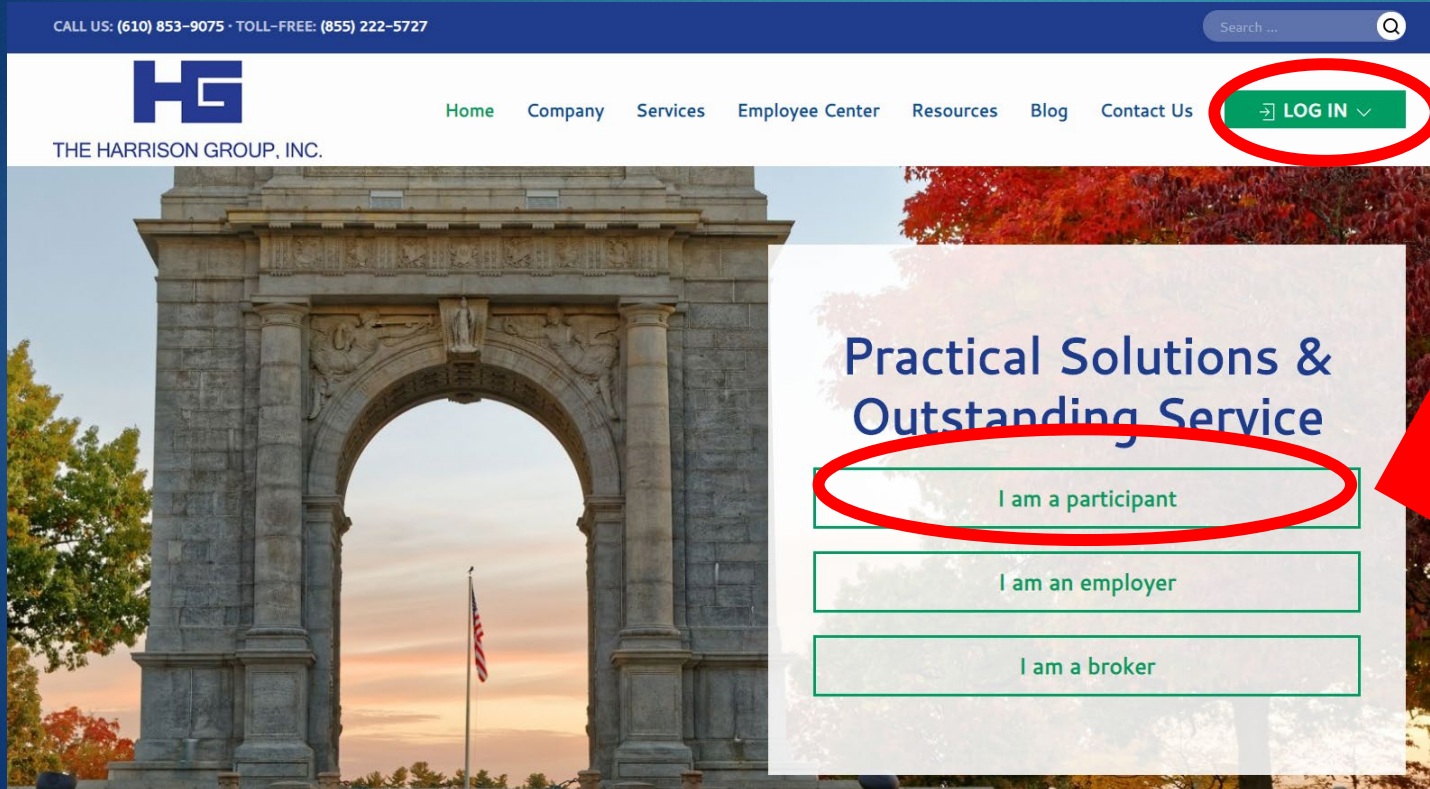
You may click on “View More” to see details.



Using your portal to upload claim information:

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1. Go to our website at:
www.theharrissongrouponline.com



Click on either
location to access
your account



2. You will be directed to your PORTAL login page.

The screenshot shows a web browser window with the URL <https://myhgaccount.lh1ondemand.com/Login.aspx?ReturnUrl=%2f>. The page has a blue header with the HG logo and 'THE HARRISON GROUP, INC.'. The main content area is white and contains a 'Login' section. Under the heading 'Existing User?', it says 'Login to your account'. There are two input fields: 'Username' and 'Password'. To the right of each field is a link: 'Forgot Username?' and 'Forgot Password?'. A red arrow points to the 'Username' field. Below the fields is a blue 'Login' button. At the bottom of the page, there is contact information: 'Contact Us - Call Customer Service at (610) 853-9075, Toll Free at (855) 222-6727 or Email us at service@theharrisongrouponline.com'. Below that is a copyright notice: '© WEX Health Inc. 2004-2018. All rights reserved. Powered by WEX Health'.

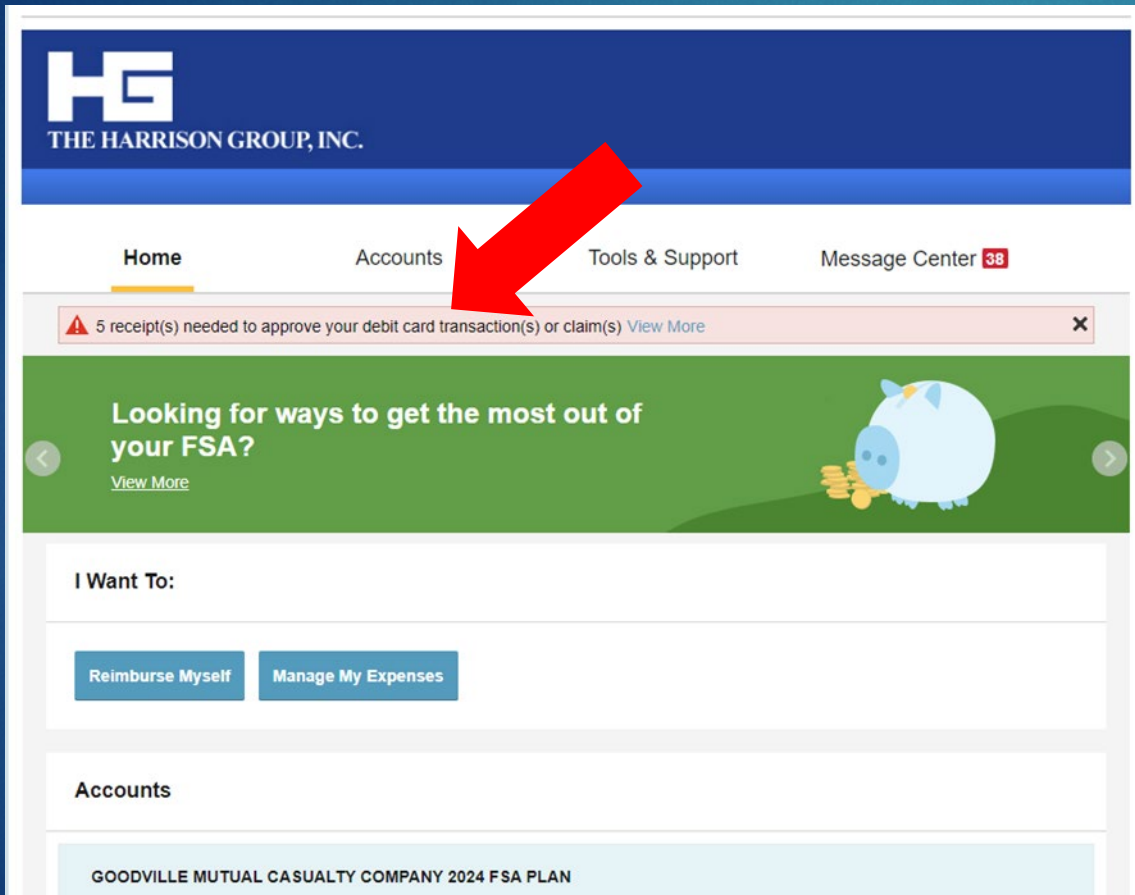
- **USER NAME** is the first letter of your first name, followed by your last name, followed by the last four digits of your SSN.
- **PASSWORD** is the last four digits of your SSN

- The first time you login, you will be prompted to answer some security questions.
- You can also change your password.



YOUR PORTAL HOME SCREEN

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This is your PORTAL HOME screen.

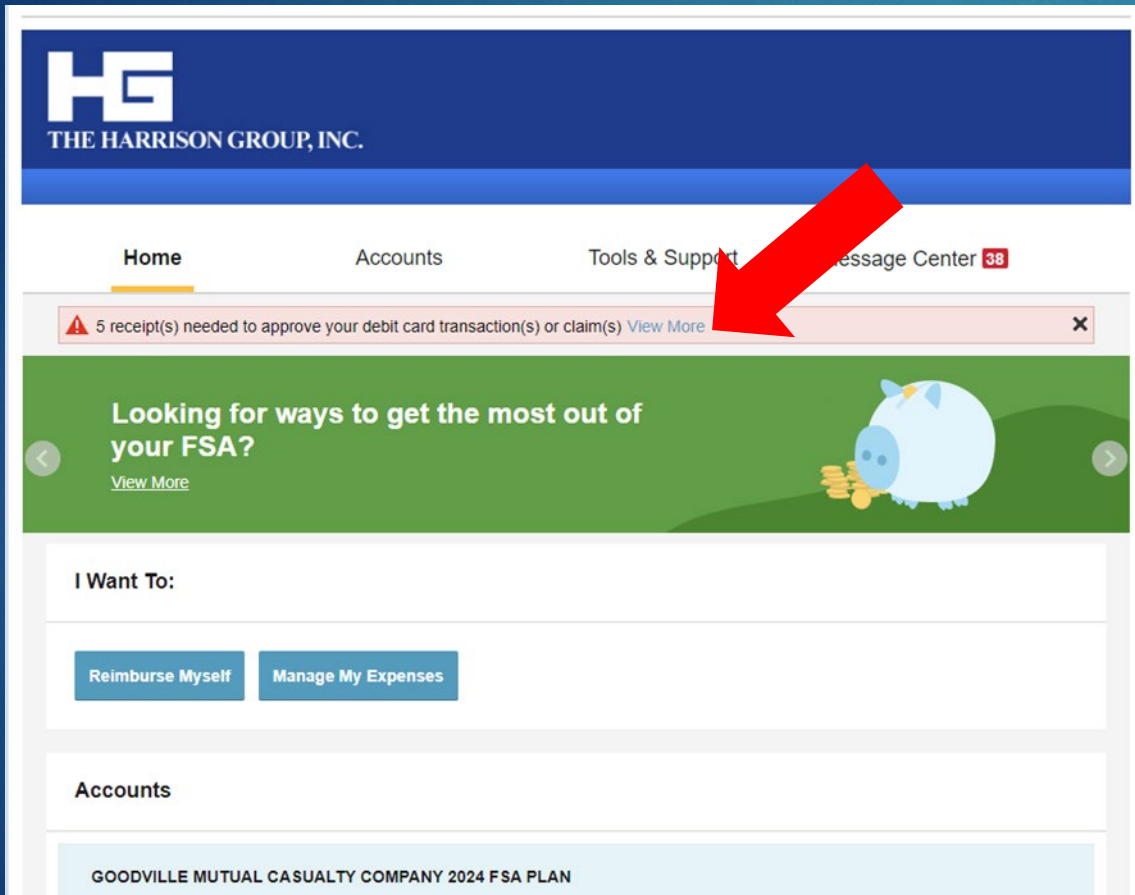
On this main page you can immediately see the RED alert box showing that you have transactions that need further documentation.

Further down the page, you can also view your balance available in your FSA account.



YOUR PORTAL HOME SCREEN

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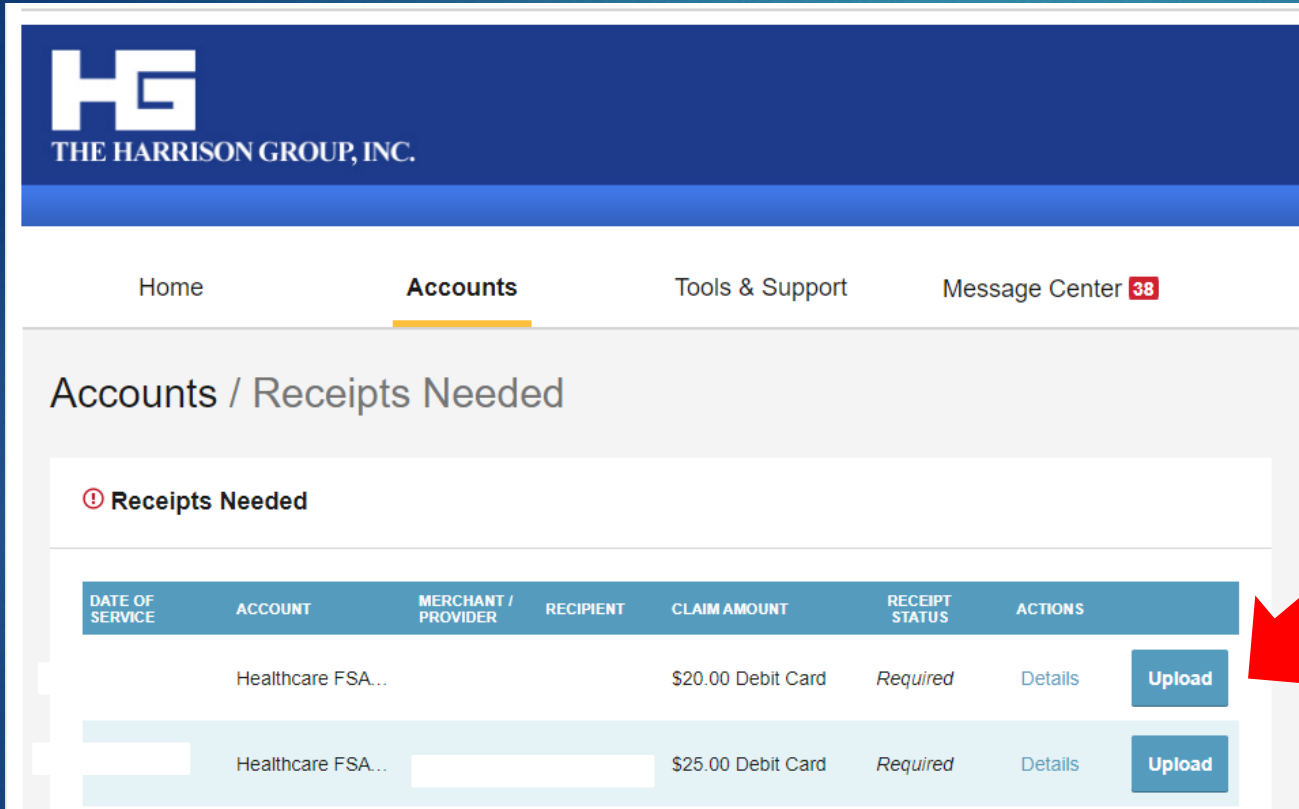


Click the “VIEW MORE” to see the transactions that require additional documentation.



How to submit receipts via your portal

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The screenshot shows the user interface of The Harrison Group, Inc. portal. At the top is the logo and company name. Below is a navigation bar with links to Home, Accounts (which is underlined), Tools & Support, and Message Center (with a red badge showing 38). The main content area is titled 'Accounts / Receipts Needed'. Below this is a section header 'Receipts Needed' with a red warning icon. A table lists transactions with columns for Date of Service, Account, Merchant/Provider, Recipient, Claim Amount, Receipt Status, and Actions. Two transactions are visible, both with a 'Required' status. The 'Upload' button in the Actions column of the second transaction is highlighted by a red arrow.

DATE OF SERVICE	ACCOUNT	MERCHANT / PROVIDER	RECIPIENT	CLAIM AMOUNT	RECEIPT STATUS	ACTIONS
	Healthcare FSA...			\$20.00 Debit Card	Required	Details Upload
	Healthcare FSA...			\$25.00 Debit Card	Required	Details Upload

You will be directed to your “Receipts Needed” page.

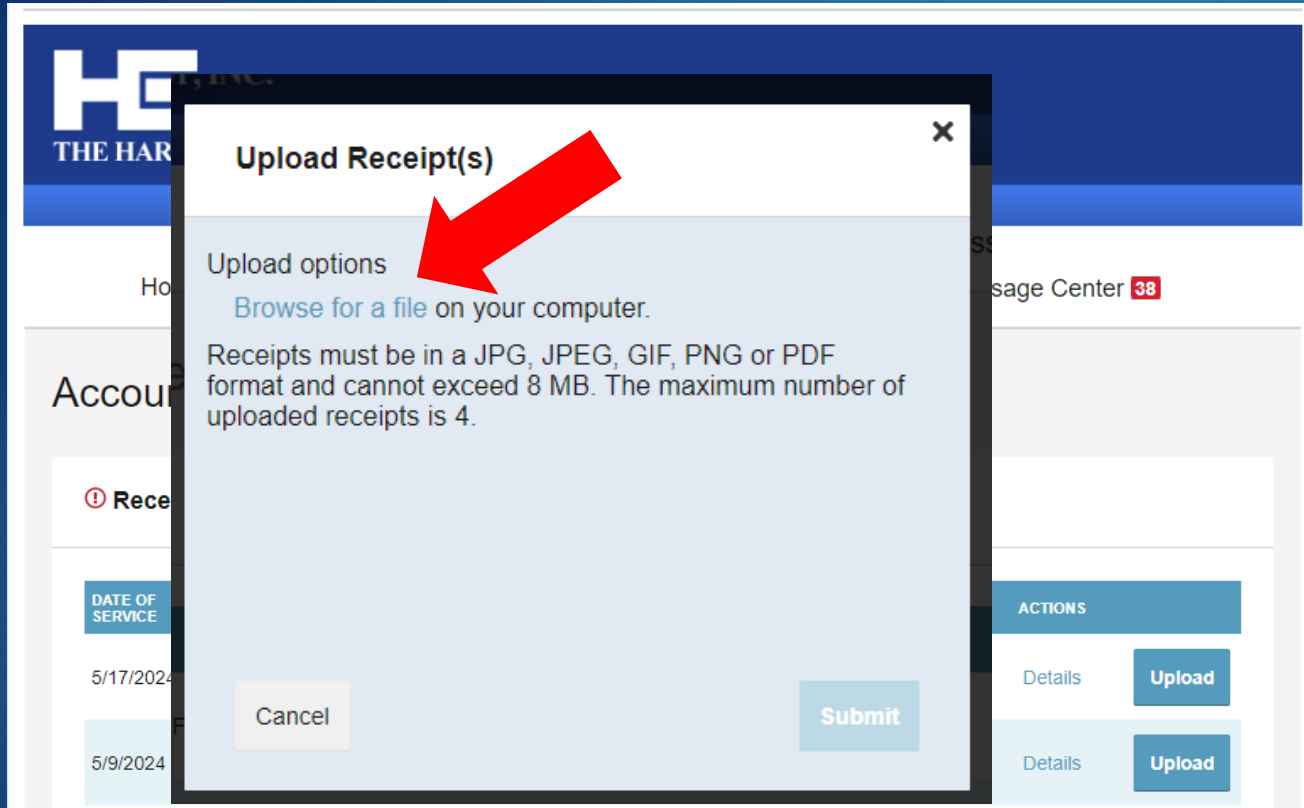
A list of transactions will appear that need further documentation.

Pick the date/receipt amount of the transaction, and select “UPLOAD”



HOW TO SUBMIT A CLAIM

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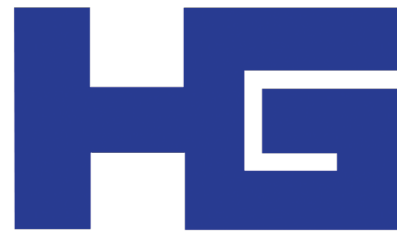


The screenshot shows a web application interface with a modal dialog titled "Upload Receipt(s)". The dialog has a close button (X) in the top right corner. Inside the dialog, under "Upload options", there is a blue link "Browse for a file on your computer." which is highlighted by a red arrow. Below this, a text block states: "Receipts must be in a JPG, JPEG, GIF, PNG or PDF format and cannot exceed 8 MB. The maximum number of uploaded receipts is 4." At the bottom of the dialog are two buttons: "Cancel" and "Submit". The background of the web application is partially visible, showing a header with "THE HAR" logo, a "Message Center" with a red badge showing "38", and a table with columns for "DATE OF SERVICE" and "ACTIONS". The table contains two rows with dates "5/17/2024" and "5/9/2024", each with a "Details" link and an "Upload" button.

Next, click on “Browse for a file” and select the name and location of the picture of your receipt.

Click “Submit”





THE HARRISON GROUP, INC.

www.theharrisongrouponline.com