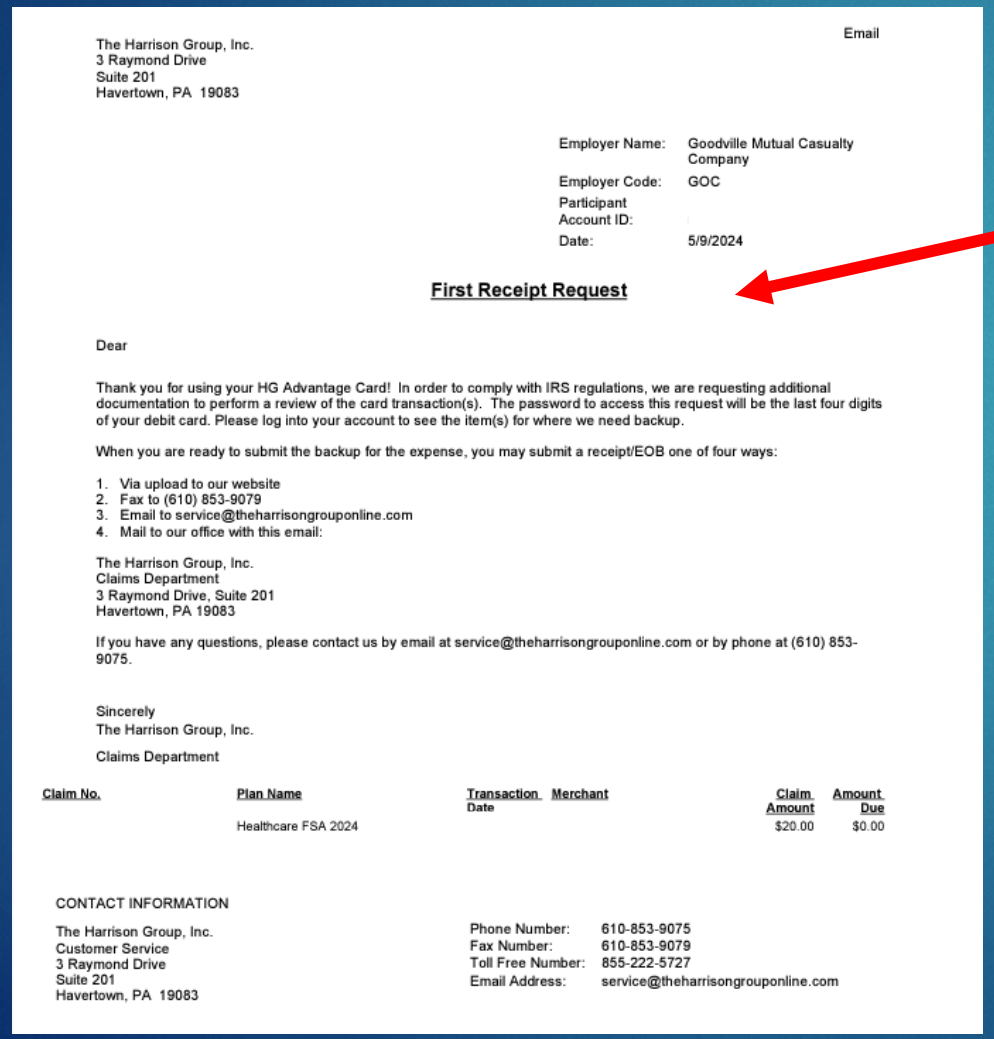
5.2024

HOW TO SUBSTANTIATE A CLAIM - Overview

PRESENTED BY:

THE HARRISON GROUP, INC.

Notification of Need to Substantiate



Email

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

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

First Receipt Request

Dear

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@theharrisongrouponline.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@theharrisongrouponline.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

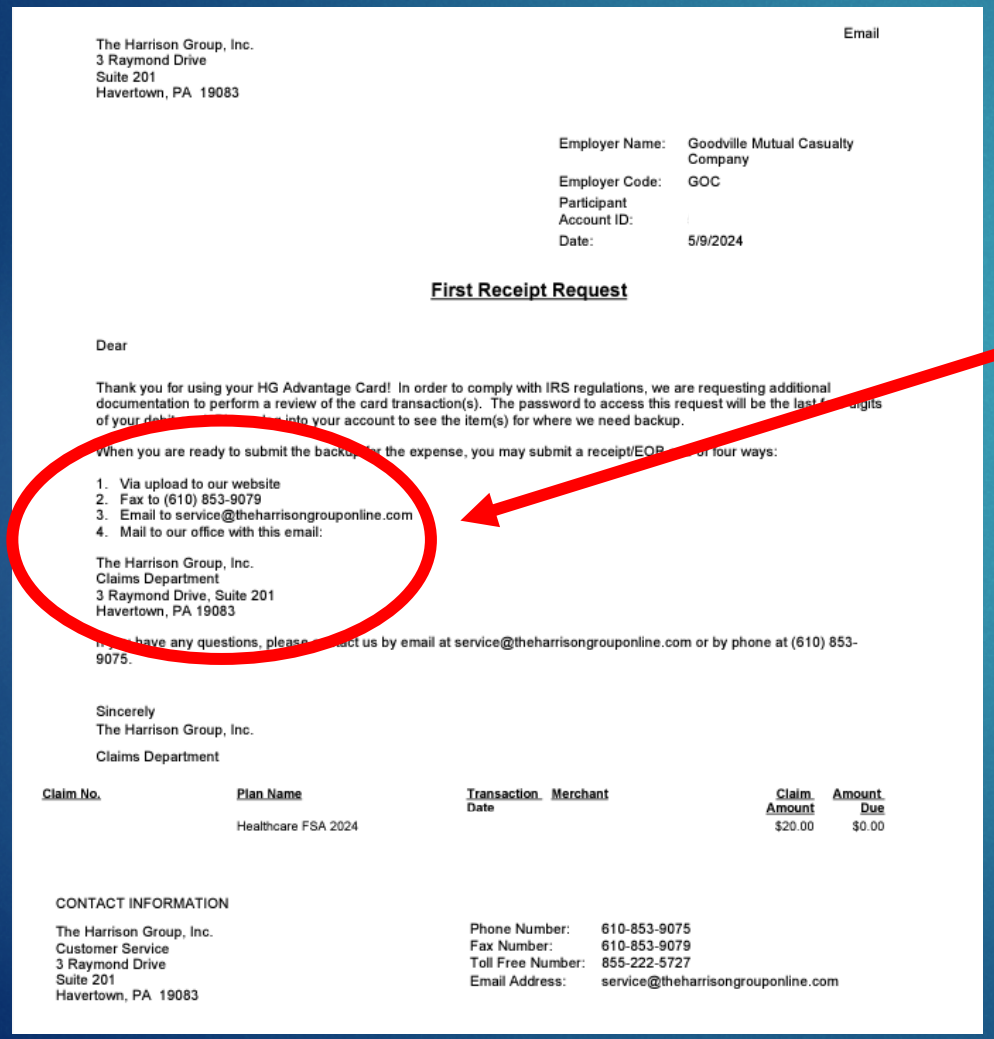
Phone Number: 610-853-9075
Fax Number: 610-853-9079
Toll Free Number: 855-222-5727
Email Address: service@theharrisongrouponline.com

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.

4 ways to submit documentation



Email

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

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

First Receipt Request

Dear

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 [illegible] digits of your debit [illegible] 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 [illegible] four ways:

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

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Claims Department
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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

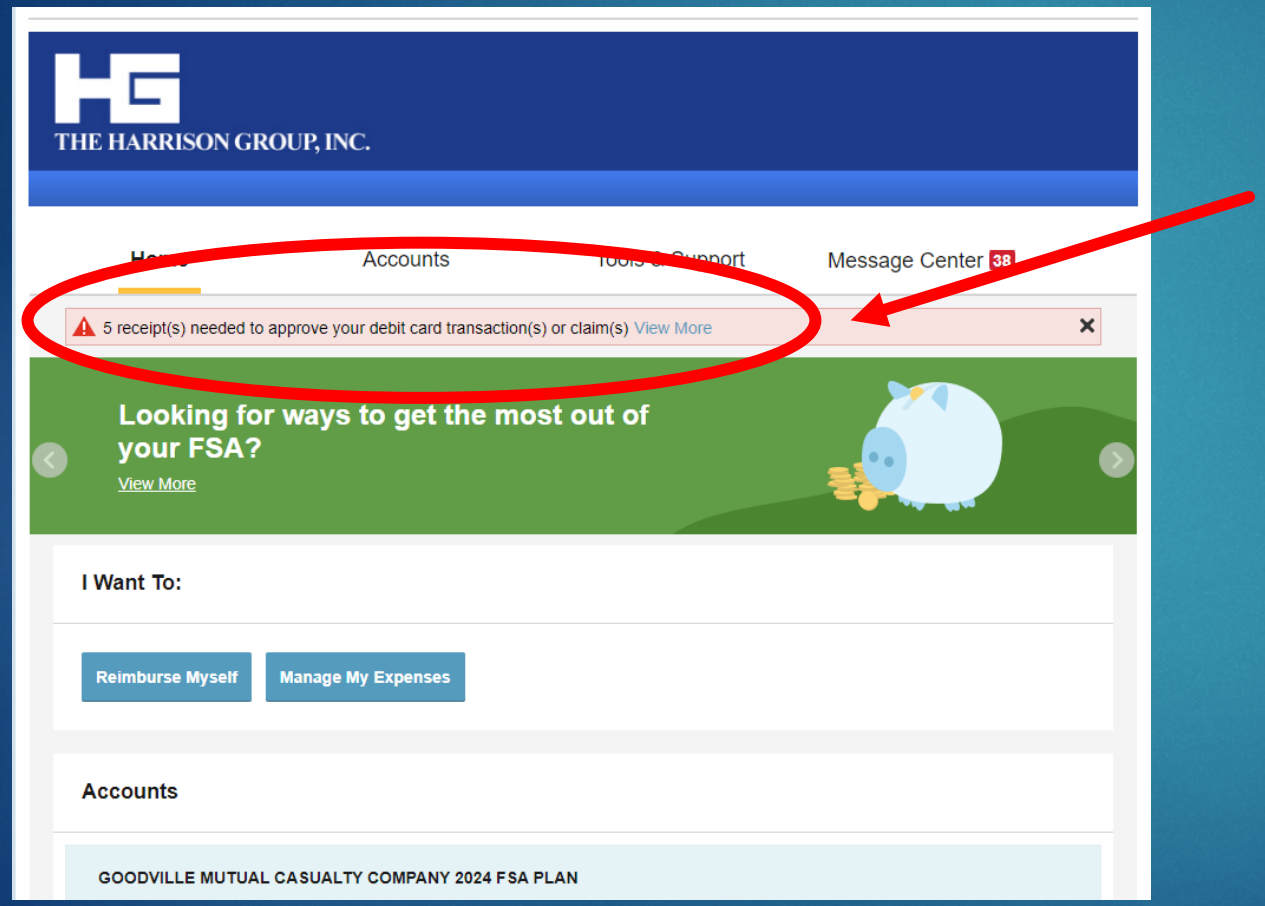
The Harrison Group, Inc.
Customer Service
3 Raymond Drive
Suite 201
Havertown, PA 19083

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

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@theharrisongrouponline.com**
4. **MAIL via US Postal Service to our address:**
   The Harrison Group, Inc.
   Claims Department
   3 Raymond Drive, Suite 201
   Havertown, PA 19083

Notification of Need to Substantiate



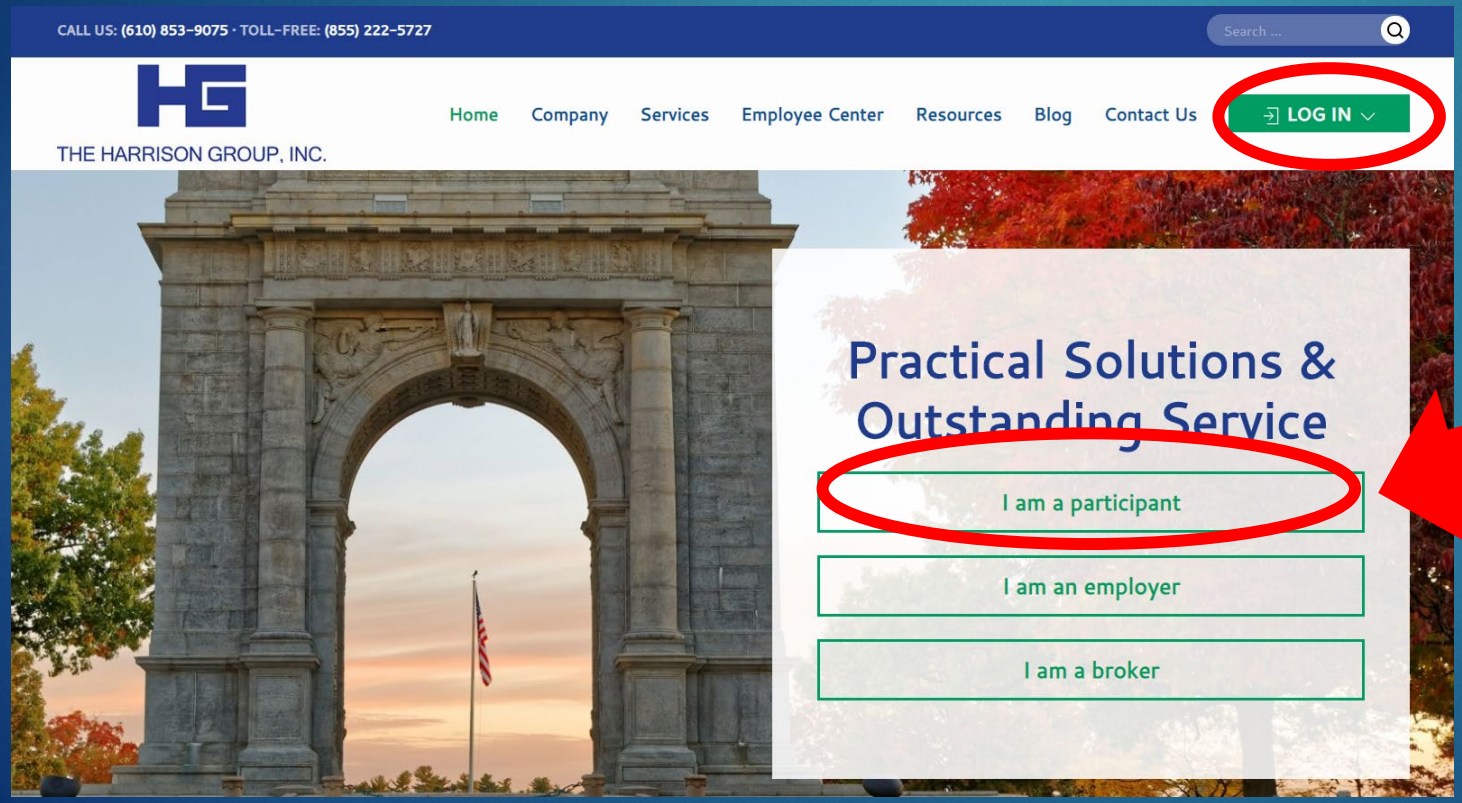
2. VIA PORTAL ALERT

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

You may click on "View More" to see details.

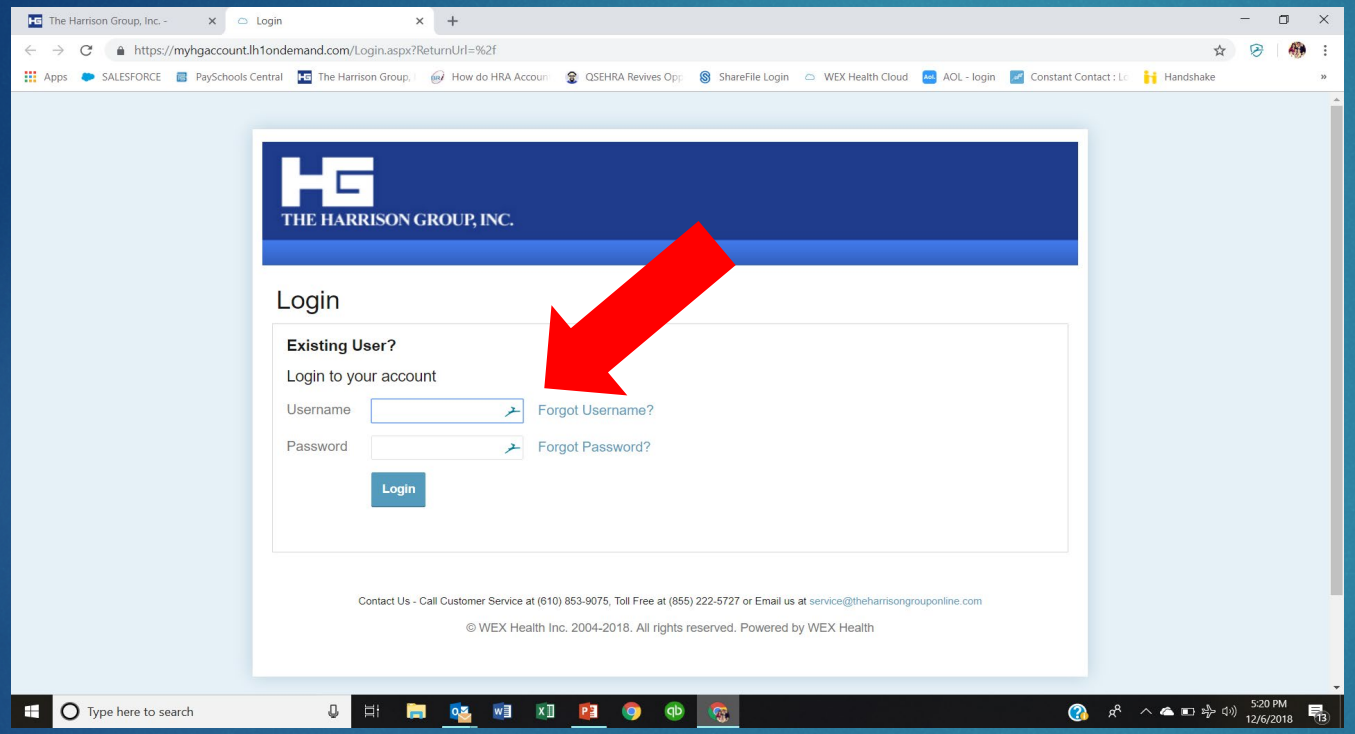
Using your portal to upload claim information:

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



Click on either location to access your account

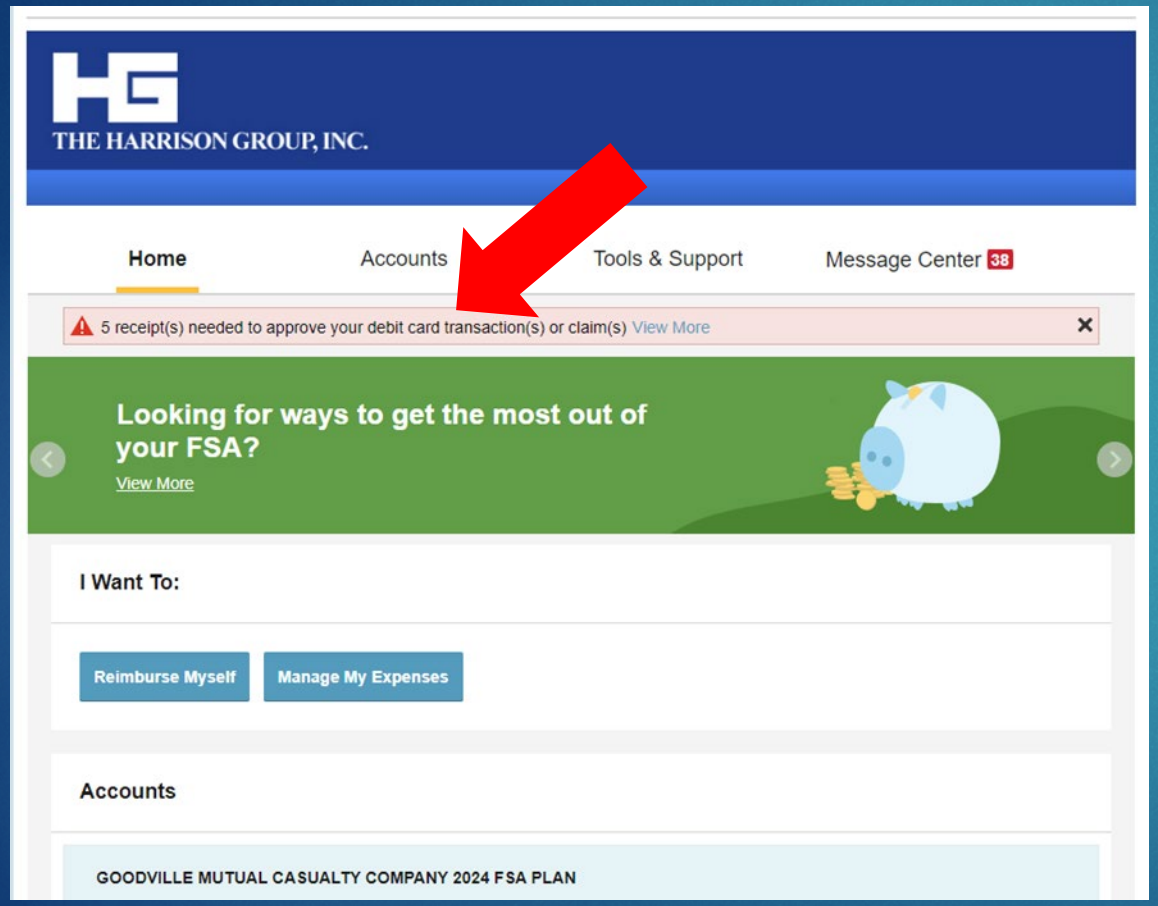
2. You will be directed to your PORTAL login page.



- **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

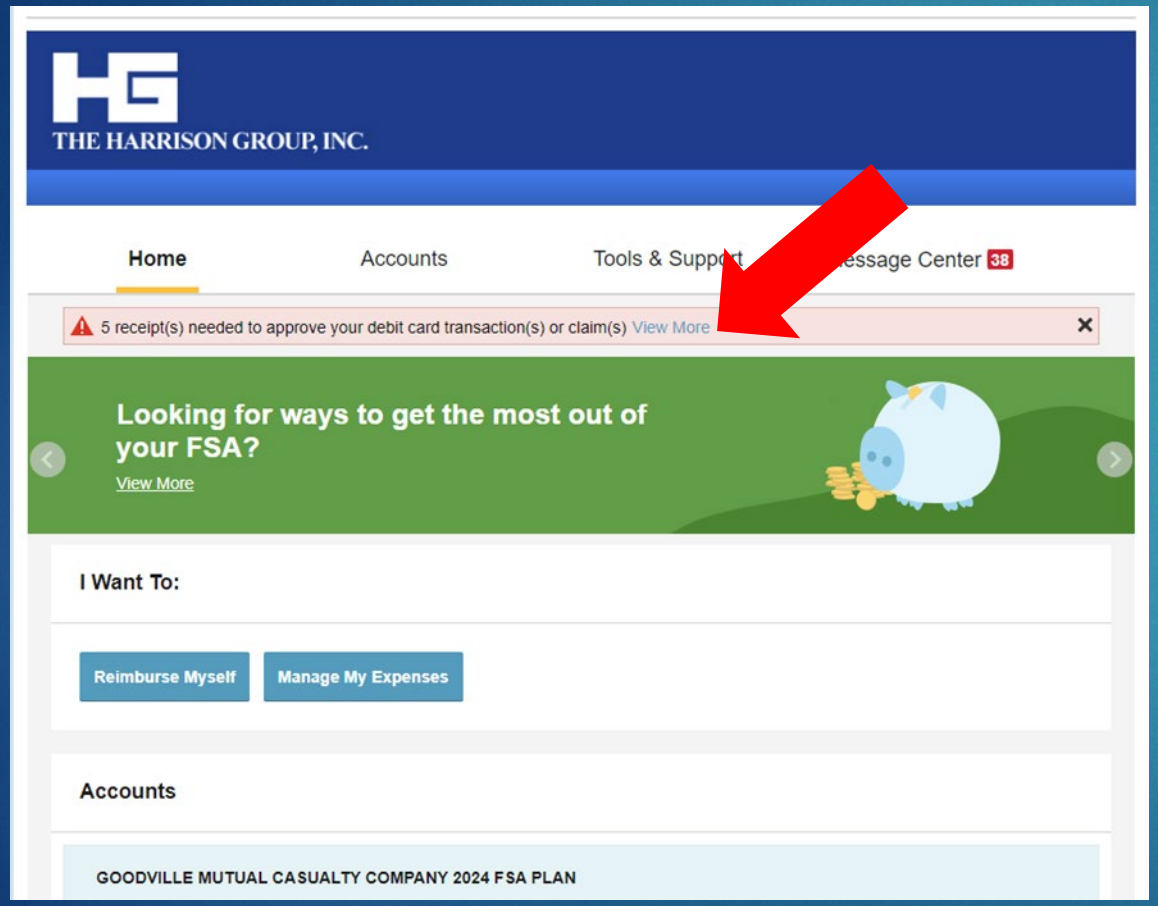


This is your PORTAL HOME screen.

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

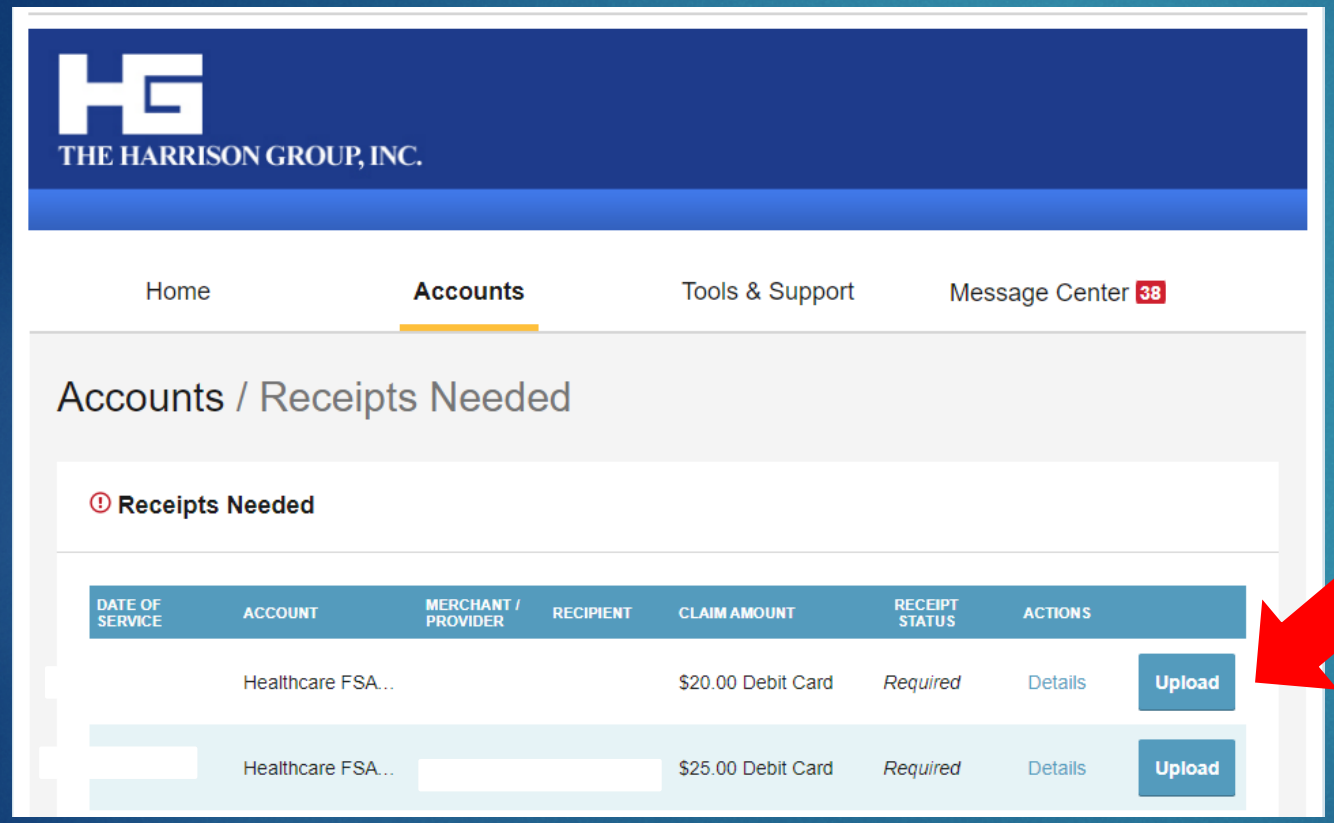
Further down the page, you can also view your balance available in your FSA account.

YOUR PORTAL HOME SCREEN



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

How to submit receipts via your portal

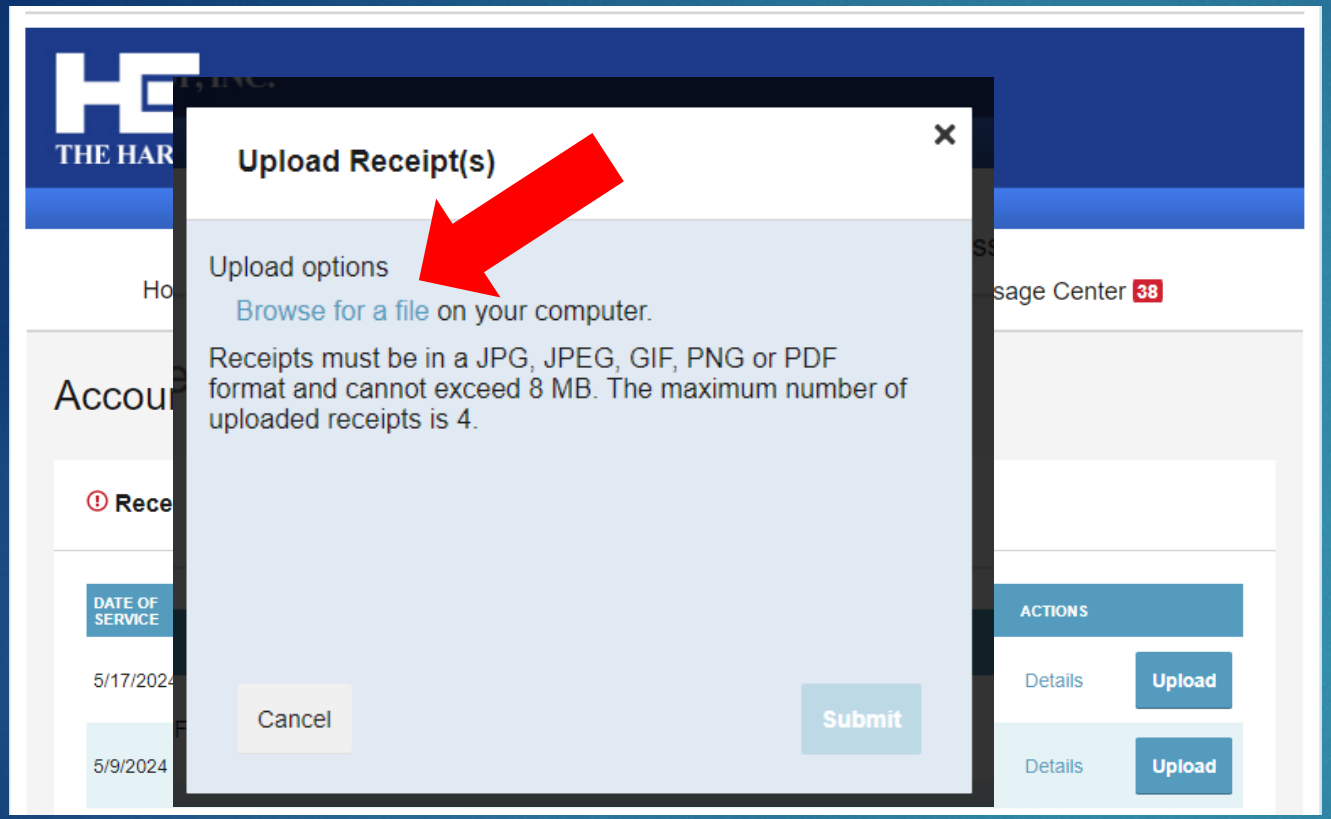


You will be directed to your "Receipts Needed" page.

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



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