



Business Information

Company Name: _____

Insurance Carrier Name(s) _____

Auto-Substantiation Parameters

Card Transactions for the amounts you indicate below will be processed as Auto-Substantiated Claims. Multiples and combinations of these copays also qualify for Auto-Substantiation. If you have multiple insurance plan options, please be sure to enter all copay amounts for all services.

Plan Description	Plan A:	Plan B:	Plan C:	Plan D:
Health Insurance (<i>not FSA</i>) Plan year				
Pharmacy – Brand Name Copay	\$	\$	\$	\$
Pharmacy – Generic Copay	\$	\$	\$	\$
Pharmacy – Non Formulary Copay	\$	\$	\$	\$
Pharmacy Mail Order – Brand Name Copay	\$	\$	\$	\$
Pharmacy Mail Order – Generic Copay	\$	\$	\$	\$
Pharmacy Mail Order – Non-Formulary Copay	\$	\$	\$	\$
Primary Physician Copay	\$	\$	\$	\$
Specialist Copay	\$	\$	\$	\$
Emergency Room Copay	\$	\$	\$	\$
Urgent Care Copay	\$	\$	\$	\$
Dental Care Copay (if applicable)	\$	\$	\$	\$
Vision Care Copay (if applicable)	\$	\$	\$	\$
Other:	\$	\$	\$	\$
Other:	\$	\$	\$	\$

Card Parameters

BASIC NEO’s standard procedure for card transaction substantiation follow up is stated below. After reviewing our policy, please sign to confirm your understanding. If you would like to arrange parameters other than what is stated, please contact BASIC NEO.

- The card will be suspended if sufficient documentation or repayment is not provided in a timely manner.
- A transaction is considered overdue for documentation if sufficient documentation is not provided within 60 days. Once a transaction is in an overdue status for 15 days, the debit card will suspend. The cardholder must then submit proper documentation or repay the plan in order for the card to be unsuspended.
- If documentation is provided for a transaction and the transaction is deemed ineligible, the cardholder will be required to repay the plan for the expense. If the cardholder does not repay the plan within 30 days, the card will be suspended (if not already suspended due to an overdue status).
- If a participant cannot submit additional documentation and cannot repay the plan for the expense, the member can submit manual claims and request that they be used to offset the amount due for unsubstantiated or non-qualified transactions.

Employer Signature: _____ Date: _____