

What is Valid Documentation?

The IRS requires us to collect specific information to verify the purchases made with your flex benefits.

Acceptable documentation should include:

- Provider's name
- Date(s) of service
- Detailed statement of services rendered or an EOB (Explanation of Benefits)
- Amount charged for each procedure
- Person who received the service

Bad Receipts

JOES'S PHARMACY
123 North Street
Jackson, MS 54321

Date: 01/25/25 Time: 10:35 AM

Terminal ID: P1230000459
Merchant ID: 51523659874512

VISA
*****0359

SALE
BATCH: 0012475
AUTH: 00035

TOTAL: \$17.05

JOHN SMITH

X _____

I AGREE TO PAY ABOVE TOTAL AMOUNT ACCORDING TO CARD ISSUER AGREEMENT

ABC DENTISTRY
123 Main Street
Jackson, MS 54321

Jane Smith Account: 0659861235
329 Magnolia Lane
Ridgeland, MS 54333 Billing Date: 2/05/2025

Date	Patient	Tooth	Description	Charge	Credit
1/15/2025	Tommy		Previous Balance	158.00	
1/31/2025			Credit Card Payment		-158.00

Scheduled Appointments:
Jane March 12, 2025 8:00 am
Rob March 12, 2025 8:00 am

Balance Due: \$0.00

Service Description Missing

Good Receipts

JOE'S PHARMACY
06/25/2025
123 North Street
Jackson, MS 54321
(601) 234-5678

RX: 123456 \$20.00 Customer Receipt

Customer: JOHN SMITH

Loratadine 20 mg tablet
Take once daily Pay: \$17.05

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ABC DENTISTRY
123 Main Street
Jackson, MS 54321

Jane Smith Account: 0659861235
329 Magnolia Lane
Ridgeland, MS 54333 Billing Date: 2/05/2025

Date	Patient	Tooth	Description	Charge	Credit
1/15/2025	Tommy		Extraction	158.00	
1/31/2025			Credit Card Payment		-158.00

Scheduled Appointments:
Jane March 12, 2025 8:00 am
Rob March 12, 2025 8:00 am

Balance Due: \$0.00