

Article ID: PCTY-69276

File a Spending Accounts Claim

The CARES Act expands eligibility for certain items to get reimbursed from pre-tax spending accounts, namely over-the-counter (OTC) medicines purchased without a prescription and menstrual products. Purchases of these items made on or after January 1, 2020, can get reimbursed from Flexible Spending Accounts (FSAs), Health Reimbursement Arrangements (HRAs), Health Savings Accounts (HSAs), and Archer Medical Savings Accounts (MSAs) via a manual claim.

1. Access Spending Accounts.
2. Select the applicable benefit tab.
3. Select **File a Claim** under Overview.
4. Complete the **Claim Details**:
 - Start Date
 - End Date
 - Claim Amount
 - Provider
 - Provider SSN/Tax ID, if applicable.
 - Category: Select Drugs & Medicine for over-the counter medicines purchased without a prescription or menstrual products.
 - Type: Select Over the Counter for over-the counter medicines purchased without a prescription or menstrual products.
 - Dependent, if applicable.
 - Mileage, if applicable.
 - Receipts: Drag and drop receipt image, or upload from computer.
5. Select **Next**.
6. Review the Transaction Summary.
7. Select **Submit**.

Important Information:

- Available for Medical Flexible Spending Accounts (FSA), Dependent Care FSA, Health Reimbursement Accounts (HRA), and Transportation Management Accounts (TMA).
- Debit card receipts do not include all the information required by the IRS for substantiation of medical expenses, and cannot be accepted as valid documentation.

You can view this article at:

<https://paylocity.egain.cloud/system/templates/selfservice/pcty/help/agent/locale/en-US/portal/308600000001000/content-version/PCTY-69276/PCTY-1004287/File-a-Spending-Accounts-Claim>