



CARD PARAMETER SETUP

BUSINESS INFORMATION

Company Name: _____ Tax Id Number: ____ - _____

Employer Name on Card (Print): _____
Employer Name to appear on the card in addition to Card Holder's Name (21 Character Maximum)

AUTO-SUBSTANTIATION PARAMETERS

Process these Card Transactions as Auto-Substantiated Claims.

**** Please note that claims that are created from transactions which automatically substantiate as a result of the conditions below will automatically be assigned to the Medical Benefit Type (refer to the Global Claim Processing System User Manual for assistance in defining Benefit Orders).**

Plans A, B, C (below) are presented to facilitate the management of different sets of copay auto-substantiation rules for an employer that offers different health insurance options to their employees.

Plan A: _____	Plan B: _____	Plan C: _____
Primary Physician: \$ _____	Primary Physician: \$ _____	Primary Physician: \$ _____
Specialist: \$ _____	Specialist: \$ _____	Specialist: \$ _____
Emergency Room: \$ _____	Emergency Room: \$ _____	Emergency Room: \$ _____
Ambulance: \$ _____	Ambulance: \$ _____	Ambulance: \$ _____
Rx (Generic): \$ _____	Rx (Generic): \$ _____	Rx (Generic): \$ _____
Rx (Brand Name): \$ _____	Rx (Brand Name): \$ _____	Rx (Brand Name): \$ _____
_____ : \$ _____	_____ : \$ _____	_____ : \$ _____

CARD PARAMETERS

- _____ Check if a card should be blocked if substantiation or repayment is not provided in a timely manner.
- _____ Number of days to wait for substantiation (documentation) before deeming transaction non-qualified.
- _____ Additional number of days to wait before attempting to collect non-qualified amounts from other qualified claims.
This process will offset the amount due for non-qualified transactions with reimbursements from qualified claims.



Employer offered Benefits

		FSA Medical Dependent Care	HRA Linked [†] HRA Non- Linked [†]	Parking	Transit
	Employer Sponsored Reimbursement Plans whose balances are to be made available to the mySourceCard for payment of eligible expenses.				
	Allow the purchase of IAS Medical (Over-The-Counter) products				
	Allow the purchase of IAS Rx (Prescription) products				
	Allow the Card to be used at 90% Pharmacies				
	Allow the Card to be used at Walgreens				

Merchant Category Code	Merchant Description – Select the desired merchant types where Card usage is allowed.	FSA Medical Dependent Care	HRA Linked / HRA Non- Linked [†]	Parking	Transit
4111	Transportation-Suburban and Local Commuter Passenger, including Ferries				
4112	Passenger Railways				
4119	Ambulance Services				
4131	Bus Lines				
5047	Dental/Laboratory/Medical/Ophthalmic Hospital Equipment and Supplies				
5975	Hearing Aids-Sales, Service, Supply Stores				
5976	Orthopedic Goods-Artificial Limb Stores				
7277	Debt, Marriage, Personal-Counseling Service				
7394	Equipment Rental and Leasing Services, Furniture Rental, Tool Rental				
7523	Automobile Parking Lots and Garages				
8011	Doctors-not elsewhere classified				
8021	Dentists, Orthodontists				
8031	Osteopathic Physicians				
8041	Chiropractors				
8042	Optometrists, Ophthalmologists				
8043	Opticians, Optical Goods, and Eyeglasses				
8049	Chiropractors, Podiatrists				
8050	Nursing and Personal Care Facilities				
8062	Hospitals				
8071	Dental and Medical Laboratories				
8099	Health Practitioners, Medical Services-not elsewhere classified				
8351	Child Care Services				

[†] HRA Linked and Non-Linked benefits are differentiated for determining what funds are available on the Card, but they share the same list of Qualified Merchant Categories.