

# Medical Necessity Form



This form is to be completed when submitting "dual purpose" expenses. Per IRS regulations, dual purpose expenses are only eligible if recommended by a medical practitioner as they have both a medical purpose and a personal, cosmetic, or general health purpose. For a list of dual purpose expenses, please visit our website.

Please complete and submit this form for any dual purpose expense for which you are requesting reimbursement. If submitting this form for a previously denied claim or debit card purchase, please include a copy of the denial notification or the appropriate form. This form need only be submitted once for each specified medical diagnosis and recommended or prescribed treatment

## Step 1: Participant Information

\*=Required Fields

\*Employer Name (Do not abbreviate)

\*Employee ID

\*Participant Name (First, MI, Last)

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\*Social Security Number

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\*Day Telephone

Updates or changes to your information can be made by logging into your account at [www.discoverybenefits.com](http://www.discoverybenefits.com)

## Step 2: Medical Practitioner Information

\*Medical Practitioner or Physician Name

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\*Phone Number

\*Name of and Type of Medical Practice

\*Address

\*State

\*Zip

## Step 3: Medical Necessity Information

\*Recipient of Treatment or Medication (First, MI, Last)

\*Medical Diagnosis or Diagnosis Code

Example: 724.2 (Lumbar Back Pain)

  
  
  

\*Treatment or Medication (supplements and vitamins must be listed individually)

Example: Massage Therapy, Glucosamine, Vitamin B12, Flaxseed Oil

## Step 4: Participant Certification

I hereby certify that the reimbursement requests I am submitting are considered medically necessary and are IRS eligible expenses. I also understand that Discovery Benefits, including its agents or employees, will not be held liable if I submit non-IRS eligible expenses for reimbursement.

\*Participant Signature

Date