OhioHealth forma

# Forma Benefits FAQ

## Q. How do I enroll in the program?

You can activate your Forma account by visiting https://client.joinforma.com/login. You will then use your OhioHealth email to login or set up your account.

## Q. What information do I need when I submit a claim?

When submitting a claim, always check the program policy for eligible items in your account. You will also need to attach a receipt or supporting documentation that includes:

- Claimant name
- Merchant or provider
- Description of the service or item
- Date of service
- Amount

Additional requirements:

- Letter of Medical Necessity (LMN): May be required for FSA or LPFSA claims
- Prescription (Rx): May be required for FSA or LPFSA claims

If you do not have an itemized receipt for a Dependent Care FSA (DCFSA) or Commuter expense, you may complete a reimbursement form and submit it with your claim.

## Q. What can be reimbursed under our HRA and how do I submit a claim?

Under your HRA, you can submit claims for coinsurance, copays, and deductibles. If you pay out of pocket for an eligible expense, you may submit a reimbursement claim through Forma.

For Rx documentation, please submit your pharmacy receipts. Rx receipts or proof of Rx purchase through OhioHealthyPlans are be accepted. Screenshots of an Rx from the OhioHealth portal are also accepted. For any other eligible expenses, please submit the Explanation of Benefits (EOBs) from your insurance portal.

More information on this can be found in your program policy.

## Q. How do I request a Forma Card?

To order a Forma Card, follow these five steps:

1: Log in to your Forma account and navigate to 'View or edit profile' by clicking on your profile in the upper right corner.
2: Select 'Pre-tax Forma Card' from the side menu.
3: Click the 'Order new card' button.
4: Select the card holder, add your phone number, and confirm mailing and billing addresses.
5: Review your details and click the 'Submit order' button.

## Q. How do I link my bank account to my Forma account?

Click your name in the upper-right corner of your account > Select "View or Edit Profile" > Click "Linked Accounts" on the left side > Choose "Link Bank." You can link your bank account for reimbursement in two ways:

1. Instant: Forma will connect directly to your bank account via Plaid. (Plaid is a secure third-party service that Forma partners with to facilitate back account verification.) Simply select your bank, enter your bank login credentials, and you're all set to receive reimbursements.

2. Manual: Enter your bank routing and account numbers. Within 1-2 business days, you'll receive a micro deposit with a code. Enter this code into Forma to complete the account linking process. This method may take 2-3 business days to set up.

## Q. How do I submit a pre-tax claim?

To submit a pre-tax claim, log in to Forma, navigate to Claims, and select 'New Claim.' Select the appropriate pre-tax benefit. Required fields may vary based on your selection, so choosing the correct account first will help avoid re-entering information later.

If you have not yet linked a bank account for direct deposit, you'll be prompted to do so before submitting your claim. This is required to receive reimbursement.

## Q. How can I get in touch with someone if I need help?

You can contact Forma Support 24 hours a day, 7 days a week by reaching out via messenger or emailing support@joinforma.com. Additionally, if you have questions about your pre-tax accounts, you can call our Support line at 1-844-902-2902 from 9am-8pm ET, Monday-Friday.