

Sachdev Wellness Clinic

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If you wish to pay for your appointment with a health savings account (HSA) or a flexible spending account (FSA) please read this memo carefully. Contact our office manager if you have any questions or concerns.

We do accept HSA and FSA payments for office visits and services. Government regulations however do not allow the use of HSA or FSA funds for services prior to the date the service is actually provided. In other words patients are not allowed to “prepay” for services using an HSA or FSA account.

In February of 2018 our office began requiring payment in full at the time patients reserved their appointment. We enacted this policy when our “no show” and last minute cancellation rate reached 60%. The policy decreased our no show rate dramatically and is crucial to our financial viability.

What should you do if you need to book an appointment and wish to pay for it using your HSA or FSA funds? You have two options:

- 1) **You can reserve your appointment using a personal credit or debit card.** On the day of your appointment inform our receptionist that you would like to **transfer the appointment fee from your personal account to your HSA or FSA account.** If you have a HSA debit card the receptionist can then bill the office visit to your HSA card during check-in. If the transaction is approved she will then issue a full refund to your personal debit or credit card. **Please allow 10-15 business days for your bank or credit card company to post the refund to your account.** The receptionist will provide you with a receipt confirming that a refund was processed via our office.

2) **You can reserve your appointment using your HSA debit card.** On the day of our appointment inform our receptionist during check-in that you used an HSA card to book your appointment. **She will need to refund the initial transaction and then process it again on the date of your appointment.** Since it may take 10-15 business days for the refund to be processed the transaction may be denied if your account balance does not demonstrate adequate funds for the new transaction. If this occurs our receptionist will give you a form to sign allowing her to keep your card information on file so she can process it again in 10 days. You will receive confirmation and a receipt on your mobile phone or email when the transaction has been approved.

What happens if I forget to follow the instructions above?

- ❖ If you are audited by the human resources department that manages your FSA or the IRS regarding use of your HSA funds the transaction will be invalid and you will be required to refund the amount to your company or the IRS. You may also incur a fee for improper use of FSA or HSA funds.