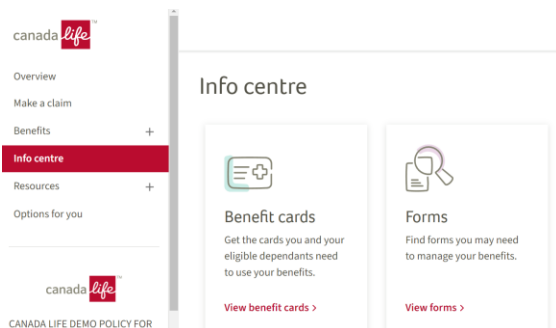


# How to submit “Other” claims using your Healthcare Spending Account

Please complete the **“Healthcare Expenses Statement”** which is available, once logged in, under the **“Info Centre”** tab on My Canada Life At Work.

-Select **“View Forms”**



-Type in the word **“health”** and select the **“Health Claim Form (combined with HCSA)”**

## Forms

Search for a form

 × 🔍  

Health Claim Form (combined with HCSA)

-Open the PDF claim form.

Claim

[Health Claim Form \(combined with HCSA\)](#) ➔ | PDF

- Check mark the applicable option, “Healthcare Spending Account Only” or “Both” if you wish to also apply to your Health plan. (if applicable)

- Complete and save completed document to your desktop or files for upload later in the claims process.

The screenshot shows a form titled "canada life Healthcare Expenses Statement With Healthcare Spending Account". It includes a section for "INSTRUCTIONS" with four numbered steps: 1. Complete page 1 and 2 of this form in full. 2. Sign and date the form. 3. Please retain copies for your files as original receipts will not be returned. 4. Send to the appropriate Benefit Payment Office for your plan. See PART 9. To the right, there is a box titled "Benefits to be paid from:" with three radio button options: "Healthcare Plan Only", "Healthcare Spending Account Only", and "Both". Below this box, a note states: "All claims under this group benefits plan are submitted through the plan member. We may exchange personal information about claims with the plan member and a person acting on their behalf when necessary to confirm eligibility and to mutually manage the claims."

Please follow the below steps to submit the claim:

Step 1: Once logged into My Canada Life at Work, click on “Make a claim”

Good morning, BERT!

The last sign-in to your account was on Thursday, October 12, 2023 at 10:27 a.m. EDT.

[Make a claim](#)

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Step 2: Select “Start a claim”

Make a claim

Submit a claim in a few easy steps. Be sure to have your receipts and any supporting documents handy.

[Start a claim](#)

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**Step 3:**

- a) Select **whom the claim is for** from the drop down box.
- b) **Plan** – Select > Healthcare Spending Account
- c) Select **“Yes or No”** to be processed under HCSA only.
- d) Click the **“check box”** as applicable.
- e) Click **“Continue”**

## Select a person to continue.

Who is the claim for?

Select a plan for this claim

Do you understand that this claim will be processed under your spending account only?

Why is this important? ▼












Yes	No
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I'm claiming expenses that were incurred by me or someone I'm entitled to claim a medical expense credit for, under the Income Tax Act.


**Step 4:** You will notice that the **“Other claim”** tile is missing from the bottom right hand corner. Below is the workaround below until this is added back.

Select a category to display additional claim types, where applicable.

Please note that your plan may not include coverage for all the claim types shown here.

 <b>Health professionals</b> Massage therapist, chiropractor, nurse, mental health providers...	 <b>Medical equipment and supplies</b> Orthopedics, breathing and communication aids...	 <b>Diagnostics and medical tests</b> Blood tests, CT scans, MRI, Pap tests...
 <b>Vision care</b> Eyewear, exams, eye surgery, visual therapy...	 <b>Drugs</b> Medications plus some diabetic supplies (e.g., syringes)	 <b>Dental</b> Dental and orthodontic services
 <b>Nursing home and home care</b> Long-term care facility and care aide services at home	 <b>Ambulance</b> Fees for ambulance services	 <b>Hospital stay</b> Room and other charges
 <b>Out-of-country care</b> Expenses while outside of Canada	 <b>Medical travel expenses within Canada</b> Lodging and travel costs for medical purposes	

a) Click the down arrow if the verbiage is not showing under “Estimates and other claims” to expand the section.

Estimates and other claims 

[Back](#) [Continue](#)


b) Click on **“PDF Claim form”** to get to the next page, *if you click continue, you will not be able to progress to the next page.*

**Estimates and other claims** ^

Most claims can be submitted by exploring the categories above. It's the best way to ensure fast processing of your claim, often in as little as 48 hours. However, if you're submitting an estimate, or your claim can't be found within the categories above, you can complete and send in a [PDF claim form](#). Allow extra time for processing.

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**Step 5: Only click “Continue”**



### Have you tried to find your claim type?


Try going back and exploring the categories. It's the best way to get fast, automated processing of your claim, often in as little as 48 hours. The Other claims and estimates option is only for estimates and for claims that aren't listed when you select a claim category on the previous page.

Looking to make a claim for services performed by a chiropractor, massage therapist, physiotherapist or other health professional? v

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Looking for psychologist or other mental health providers? v

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 If you continue, you will need to complete a PDF claim form and your claim will require manual handling and will take 7 to 10 days to process.

**Step 6: Select “HCSA claims” from the drop down box.**

At this point you can also click find a claim form to find the “Healthcare expenses statement” claim form however as mentioned earlier, we suggest having the claim form fully completed and ready for upload prior to beginning the online claims process.

⚠ Submitting a claim? Uploading a PDF or scanned claim form will result in manual processing and will take much longer to process. We strongly recommend selecting the “back” button at the bottom of this screen to explore the claim categories on the previous page. In most cases, you can submit your claim there and have it processed automatically within 48 hours.

## Download and complete a claim form

Upload the form with your receipts and documents

Select your claim type

Claim type

HCSA claims ▼

Find your form in [claim forms](#) ↗

Then return here to upload your completed form. Your signature is not required on the form if you're submitting it online.

**Step 7: Upload the “Healthcare Expenses Statement” claim form along with any applicable receipts.**

**\*For example - receipt for Health & Dental premium contributions.**

-Select “**No**” for, “is this an estimate or pre-determination?”

## Add claim form and documents

Maximum file size 7 MB. Supported types: JPG, JPEG, TIFF, PNG, PDF.

Or drop files

Is this for an estimate (pre-determination)?

What does this mean? ▼

Yes No

**Step 8:** Read the online claim terms and conditions. If you agree, move forward by clicking and confirming that you have uploaded your claim form and other supporting documents (such as receipt of payment)

**Step 9:** Click on **“Submit”** to submit the claim.

 **Online claim terms and conditions**

I certify that the information provided is true, correct and complete to the best of my knowledge. I certify that all goods and services being claimed have been received by me, my spouse/common-law partner and/or my dependants.

The submission of fraudulent claims is a criminal offence. Canada Life takes the submission of fraudulent claims seriously. Suspected fraudulent claims may be reported to your employer or plan sponsor and to the appropriate law enforcement agency.

I will keep all receipts and supporting documentation for 2 years in case my claim is audited.

By submitting this claim, I agree to the [online claim terms and conditions](#), and I agree to the collection, use and disclosure of personal information as set out in the [Privacy guidelines](#). This includes the administration of my products or services and to help us analyze and optimize customer service and business processes. Personal information may be disclosed to service providers and others referred to in the Privacy guidelines, where required to administer products or services.

Before you submit

I've uploaded my claim form, receipts and supporting documents.

I

Back

Submit

**You will receive a notice confirming that your claim has been submitted.**

\*\* Please note that you will not see the submitted HCSA claim online until it has been processed.

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