

Reimbursement Evidence File

Purpose: An evidence outline for reimbursement records and substantiation support.

At a glance

- Resource type: Evidence File
- Resource category: Evidence Files
- Review sensitivity: qualified-review

Reimbursement evidence file

Record	Required support	Watch for
Substantiation	Required proof under approved process	Do not decide claims outside scope
Coverage proof context	Approved proof type and source	Avoid privacy-sensitive overcollection
Payment log	Payment date, amount, exception status	Reconcile variances
Exception note	Issue, route, final resolution	Route claims or privacy issues
Vendor support	Vendor instructions and source version	Retain approved version

Checklist

- Use approved substantiation instructions.
- Retain payment and exception records externally.
- Route claims determinations and privacy-sensitive questions.
- Do not upload completed reimbursement records into the toolkit.

Review triggers

- Claims determinations, privacy-sensitive material, missing proof of coverage, or incomplete substantiation.

Evidence examples

- Substantiation records
- Coverage proof context
- Payment logs
- Exception notes

Reminder

This toolkit provides educational and operating-model resources. It does not assign responsibility, manage implementation tasks, replace plan documents, or provide legal, tax, payroll, Medicare, carrier, or individualized benefits advice.

Use this when

- Reimbursement support needs a consistent evidence record.

Watch for

- Claims determinations, privacy-sensitive material, missing proof of coverage, or incomplete substantiation.

Evidence to retain

- Substantiation records
- Coverage proof context
- Payment logs
- Exception notes

Related resources

- Five Duty Paths Overview
- ICHRA Ecosystem SOW Template
- Role Code Reference
- Partner Coverage Diagnostic
- Employer Discovery Intake

Educational disclaimer

© 2026 Helping Health, Inc. All rights reserved. HRB materials are provided for general educational and operating-model purposes only. They should not be construed as legal, tax, accounting, payroll, Medicare, carrier, fiduciary, or compliance advice. Employers, advisors, and other parties should consult qualified professionals regarding their specific facts and circumstances.

