

Claim Substantiation Statement Form

This form is to be completed when good faith efforts to obtain third-party documentation have been unsuccessful due to a natural disaster.

*= Required Fields

Step 1: Participant Information

*Employer Name (Do not abbreviate)

*Employee ID

*Participant Name (First, MI, Last)

*Social Security Number

Step 2: Reason for Documentation Absence

*Reason(s) for inability to provide required documentation (include date(s) of described disaster):

Note: A separate Claim Substantiation Statement (Natural Disaster) must be submitted for each substantiation request and/or reimbursement request. A Receipt Reminder or Reimbursement Request Form needs to be submitted with the Claim Substantiation Statement (Natural Disaster).

Step 3: Participant Signature

I understand that the documentation requested is to meet mandatory obligations under IRS law. I have made a good faith effort to obtain a receipt or other third-party statement but am unable to do so because of the disaster described above.

*Participant Signature

*Date