Quick Reference Guide

PAYFLEX®

PayFlex® Reimbursement Account

Take advantage of all the online features and tools available to you. This guide will help you easily manage your account online.

Get started

- Go to **payflex.com**.
- Click **Sign In**, located at the top right corner.
- If you're a new user, click **Create Your Profile** and complete the required fields.

View eligible expense items

To view a list of eligible expenses, log in and click on **Quick Tips**. Then select **Explore eligible expenses**.

View your account balance, deposits and payments

- After logging in, you'll see your account balance(s) on the dashboard. Or you can click **Your Accounts** at the top of the page and select the account you wish to view.
- To view your claims, click **View account details** from the home page. Then click on the **Claims** tile.
- To view your payments and deposits, click **View account details** from the home page. Then click on the **Transactions** tile.

How to file a claim online

You can pay yourself back for an eligible out-of-pocket expense, or you can pay your provider directly from your PayFlex account. After logging in, click on **File a claim** on the homepage.

To pay yourself back, select **Pay Me**.

- Enter your claim details. To add additional eligible expenses, select **Add Another Expense**.
- Once you enter in all of your eligible expenses, click **Next**.
- Review and confirm all expense details. Click **Next**. To make changes, click **Previous**.
- Check the signature box to sign your claim and confirm your submission is for an eligible expense.
- Select **Fax** or **Upload**.
    - To "Fax," click on **Create Coversheet**. Print and sign the form. Fax it with your supporting documents to the number on the coversheet. When you sign the fax coversheet, you certify that your claim is for an eligible expense.
    - To "Upload," select **Choose File**. Select your supporting documents from your computer. To add additional documents, click on **Add Additional Document**. Then click **Submit**.

IMPORTANT NOTE: You can upload documents in JPG, PNG, GIF or PDF. The total size limit is 10MB. Your documents must show merchant/provider name, patient name, date of service, description of service and final amount you had to pay.

How to file a claim online (continued)

To pay your provider directly, select **Pay Them**.

- Select your payee from the drop-down menu and click **Next**. To add a new payee, click on the + symbol.
  - If you add a new payee, complete all the required fields. Click **Save**, then click **Next**.
- Enter your contact number, statement date and invoice number (if applicable), patient name, and any comments you may have. Click **Next**.
- Enter your claim details. To add additional eligible expenses, select **Add Another Expense.**
- Once you enter in all of your eligible expenses, click **Next**.
- Review and confirm all payment details. Click **Next**.
- Check the signature box to sign your claim and confirm your submission is for an eligible expense.
- Select **Fax** or **Upload**.
  - To "Fax," click on **Create Coversheet**. Print and sign the form. Fax it with your supporting documents to the number on the coversheet. When you sign the fax coversheet, you certify that your claim is an eligible expense.
  - To "Upload," select **Choose File**. Select your supporting documents from your computer. To add additional documents, click on **Add Additional Document**. Then click **Submit**.

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Don't forget to sign up for the "Explanation of Payment" paperless notification through **Account Settings.** Select **Account notifications** and click on the + sign next to **Reimbursement Account**. This tells you when we processed your claim.

Order an additional PayFlex Card® for your spouse or dependent

- After logging in, click on **Account Settings** and then select **PayFlex Card.**
- Click on **Order a Dependent Debit Card**.
- Enter the first and last name of your spouse or dependent and click **Submit**. Once you order a card, you should get it within 10 to 15 business days.

Account notifications

- After logging in, click on **Account Settings** (top right) and then **Account notifications** (left side).
- Select a + sign to view your options. Then choose the notifications you want to receive and how to receive them (email, text and/or online message). Then click **Save**.

To get your money faster, link your bank account

1. Once logged in, go to **Account Settings** (top right) and click **Bank accounts** (left side).
2. Click on **Link Bank Account to my Reimbursement Account(s)**.
3. Select the bank account type (checking or savings) and enter your account number and routing number.
4. Check the box to authorize PayFlex to link your account and click **Save and Continue**.
5. Review your bank account information and click **Save and Continue**.

Now we can deposit your claim reimbursements directly in to your bank account.

Questions?

Log in to your PayFlex member website and click **Contact Us**. We're here to help Monday – Friday, 7 a.m. – 7 p.m. CT, and Saturday, 9 a.m. – 2 p.m. CT.

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