

## Quick Reference Guide

### PayFlex Reimbursement Account

Take advantage of all the online features and tools available to you. This guide will help you easily manage your reimbursement 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. Be sure to have your PayFlex Card® nearby. You'll be asked to enter part of your card number to help verify your identity.

#### View eligible expense items

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

#### 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 the **Claims** tile.
- If you're asked to verify your card purchase is an eligible expense, you can take action online. Click **View account details** from the home page. Then click the **Transactions** tile.

#### Verify your PayFlex Card® purchases

- If you're asked to verify your card purchase is an eligible expense, you can take action online. Click **View account details** from the home page. Then click the **Verify card purchases** tile.
- To get started, select the card purchase you want to verify.

#### 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 (if offered). After logging in, click on **File a claim** on the home page, under Account Actions.

To pay yourself back, follow these steps.

- Select your expense type.
  - Enter the amount of your eligible expense. For the date of the expense, select the date you received the care, item or service. Then select who the expense is for and click **Continue**.
  - Review your claim details. You can edit, remove, add another expense or continue.
  - Choose where you want to send your funds. If you linked a bank account (set up direct deposit), you can choose **Send funds to my bank account**. If you don't link a bank account, you can choose to get a check by mail.
  - You can upload, fax or mail your supporting documents. If you select upload, the documents must be saved to your computer. (See important note in this guide).
- If you choose to fax/mail your supporting documents, you must download a coversheet after you submit your claim. Then print and send it with your documents.
- Read the claim certification statement and check the box to sign your claim. Then click **Submit**. If your claim is submitted successfully, you'll see a confirmation message.

\*If you're an Aetna member, you can access your PayFlex account from the Aetna member website.

## File a claim online (continued)

To pay your provider direct from your reimbursement account, follow these steps.

- Under Account Actions, click **File a claim**.
- Select your expense type.
- Enter the amount of your eligible expense. For the date of the expense, select the date you received the care, item or service. Then select who the expense is for and click **Continue**.
- Review your claim details. You can edit, remove, add another expense or continue.
- To send payment to a health care provider, select **Send funds to someone else**.
- Select a recipient or add a new one. Under *Additional payment information*, enter your phone number and the name of the person who received the care/services. If you have an account number or invoice number for your payment, be sure to enter it. It can help your provider apply your payment correctly.
- Review your payment information. To make changes, click **Edit**. Otherwise, click **Continue**.
- You can upload, fax or mail your supporting documents. If select upload, your documents must be saved to your computer.

If you choose to fax/mail your supporting documents, you must download a coversheet after you submit your claim. Then print and send it with your documents.

- Read the claim certification statement and check the box to sign your claim. Then click **Submit**. If your claim is submitted successfully, you'll see a confirmation message.

**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.

Don't forget to sign up for the "Explanation of Payment" paperless notification through Account Settings. Click **Account notifications** and check the **Go Paperless** box. This tells you when we processed your claim.

## Order an additional PayFlex Card® for your spouse or dependent

- To order a card, click on **Account Settings** at the top of the page, then select **PayFlex Card**.
- Click **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.

## Set up account notifications

- After logging in, click **Account Settings** at the top of the page and then **Account notifications**.
- Manage your paperless settings by checking "Go paperless". Select a **+** sign to view your other notification options. Then choose the notifications you want to receive and how to receive them (email, text and/or online message). Click **Save**.

## To get your money faster, link your bank account (set up direct deposit)

- After logging in, go to **Account Settings** (at the top of the page) and click **Bank accounts**.
- Click **Link Bank Account to my Reimbursement Account(s)**.
- Select the bank account type (checking or savings) and enter your account number and routing number.
- Check the box to authorize PayFlex to link your account and click **Save and Continue**.
- Review your bank account information and click **Save and Continue**.

Now we can deposit your claim payments directly into your bank account.

# Questions?

Log in to your PayFlex member website and click **Contact Us** under **Help & Support**. Here you can also **Live Chat** with us.

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