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Filing your Spending Account Claim

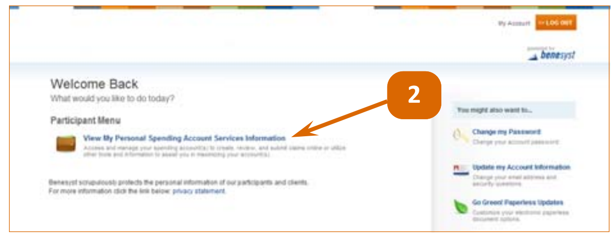
How to file your FSA and/or HRA claims and receive reimbursement from Benesyst

Online Claim Wizard

The **fastest** and **easiest** way to submit your claim is using the *Online Claim Wizard*. It allows you to submit your FSA and/or HRA expense information online and gives you the option of uploading your scanned documentation or printing a bar-coded cover sheet to fax your supporting documentation to Benesyst.

Step 1—Access your Account

Access your account by going to www.benesyst.net and clicking **Login** in the upper right corner or bookmark the following site: https://portal.benesyst.net

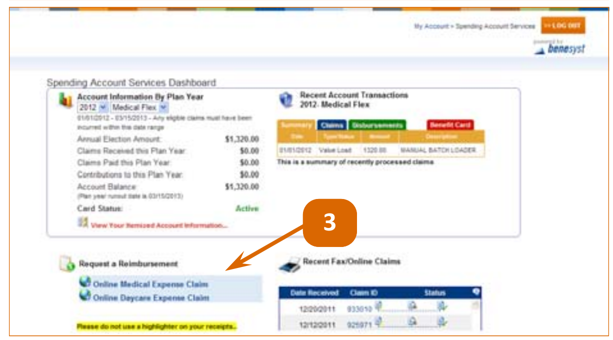


Step 2—View Personal Spending Account Information

Once logged in, under the *Participant Menu*, select **View My Personal Spending Account Services Information** (see sample on right).

Step 3—Begin Online Claim

From the *Spending Account Services Dashboard*, under *Request a Reimbursement* select **Online Medical Expense Claim** or **Online Daycare Expense Claim** based on the type of claim you are filing (see sample on right).

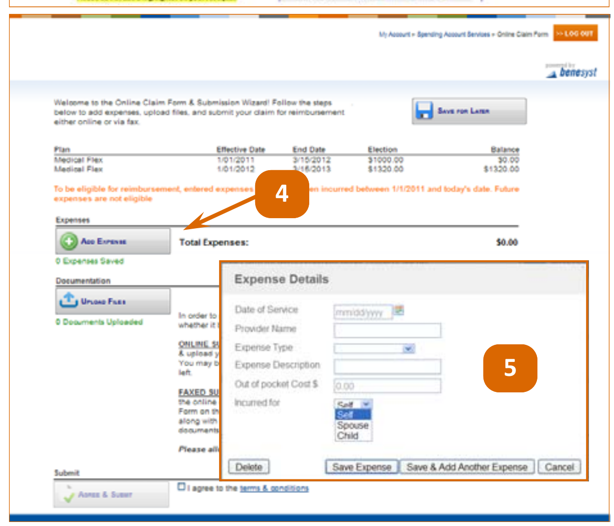


Step 4—Add Expenses

From the Online Claim screen, select **Add Expense** to open the Expense Details window (see sample on right).

Step 5—Enter Details for Each Expense

You can enter multiple expenses on one claim. Complete an *Expense Details* entry for each eligible expense including: Date of Service, Provider Name, Expense Type, Description, Out of Pocket Cost and for whom it was incurred. Enter multiple expenses by simply clicking **Save & Add Another Expense**. From the Online Claim screen you can also click **Save for Later** to save your work and return at any time.



Step 6—Upload Documentation

For faster claim processing is it recommended that you scan & upload your supporting documents. Documents should be in .JPG, .TIFF or PDF format and must be 8MB or smaller. Select Upload Files and upload directly from your computer—a thumbnail image will appear on the screen. You can click on the file name below the thumbnail to enlarge the image. **<u>It is important that you verify the documents are readable</u>** - otherwise the claim can not be processed.

If you do not upload documentation, you will be presented with a Fax Cover Sheet to print and fax along with your documentation to 800.310.8279 after you submit your claim.

Step 7—Submit Claim

Be sure to check the "I agree to the Terms & Conditions" checkbox and click the **Agree & Submit** button to submit your claim (if you are faxing your documentation, the fax coversheet will appear after you click the **Agree & Submit** button).

- The expense must have been incurred during your "Plan Year", the 12-month period in which you may elect an annual election (not necessarily the calendar year—please consult your plan document) and within your eligibility date into the plan.
- Acceptable documentation includes copies of any receipt or EOB (Explanation of Benefits)/statement containing the provider's name (or store name), a clear, itemized description of the service provided (or item purchased), and the amount you owe after insurance.
- Unacceptable documentation includes Credit Card receipts, copy of personal check or receipts that only show a payment without out of pocket expense information.