

FILING A CLAIM TO PAY EXPENSES? FINISH IN 3 EASY STEPS!

Complete the steps below to access your funds. It's that easy!

Step 1 - Collect your receipts and other documents.

Need information about what to submit? See the FAQ on the reverse side.

Step 2 - Choose how to submit your claim.

See below for options and instructions.

Step 3 - Submit your request.

We'll review your claim and issue payment in 2-3 business days after approval. We'll notify you via the email address on file if we need additional information to approve your claim.



HOW TO SUBMIT YOUR CLAIM



PARTICIPANT PORTAL

- Click the **Pay Myself** button for direct deposit.
- Click the **Pay Someone Else** button to pay your provider, if your plan allows it.
- Upload your documentation.
- Complete all required fields.



MOBILE APP

- Tap the **Reimburse Myself** button for direct deposit.
- Tap the **Send Payment** button to pay your provider, if your plan allows it.
- Upload your documentation.
- Complete all required fields.



MAIL, EMAIL OR FAX

- Contact Participant Services for the request form or download from **Tools and Resources** in the portal.
- Complete all required fields and sign form.
- Include your documentation.
- Return using the contact information on the form.

Frequently Asked Questions (FAQs)

Q: What documentation is required in order to pay my expense?

- A: Benefit accounts can vary from plan to plan, but in general, any documents you submit should include this information:
- Name of provider or merchant where product or service was received.
 - Name of person who received the product or service.
 - Description of the product or service.
 - Date(s) of service.
 - Amount paid.
 - For prepaid orthodontia claims—your orthodontic treatment plan and contract.

You aren't required to submit documentation for HSA (health savings account) transactions, but you should keep records of the expenses you reimburse.

Q: What account type should I select for my claim?

- A: When filing your claim online or on the mobile app, use the following account types:
- Health Reimbursement Arrangements (HRAs) = Medical
 - Flexible Spending Accounts (FSAs) = Medical
 - Limited Purpose Flexible Spending Accounts = Medical
 - Dependent Care = Dependent Care
 - Mass Transit = Transportation and Parking
 - Parking = Transportation and Parking
 - Lifestyle Spending Account (LSAs) = LSA

Q: What is the deadline to file my claim?

- A: For benefit accounts, this varies from plan to plan. You can find the final filing date in your plan documents. As the deadline approaches, the portal and the mobile app will display these dates to help you remember to get your claims in on time. Participant Services can also provide this information.



Questions?
We're here for you!

Contact us at 800-270-7719
or email ParticipantServices@AssociatedBank.com

