

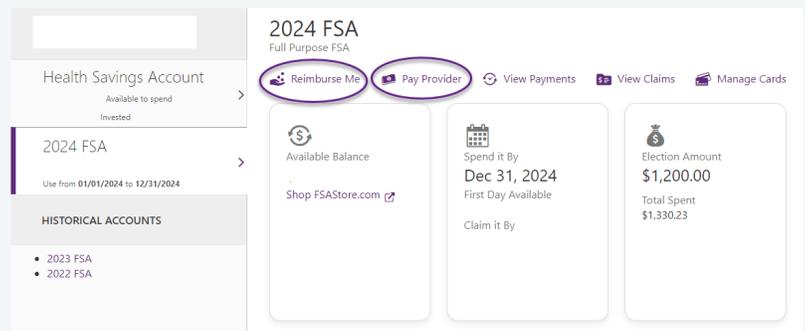
How to submit an online claim

This guide outlines the claims/submission process using the HealthEquity website and Mobile app.



Here's what to do:

- 1 Log in to your HealthEquity account at [my.HealthEquity.com](https://my.healthequity.com)
- 2 The crew can submit **Reimburse Me** or **Pay My Provider** from the homepage of the Flexible Spending Account (FSA) tab.



Reimburse Me

1. Navigate to the account dashboard by clicking on the **Home** button at the top of the page.
2. Click on the Reimburse Me button above the account balance.
3. Check if the expense you want is listed. If it is, move to step 9.
4. If not, click on **Add a New Expense**.
5. Fill out the details of your expense.
Note: 'Provider' can mean either the name of your healthcare provider or the name of the clinic/vendor.
6. Upload any receipts or invoices you might have by clicking on the box below 'Drag and Drop.'
 - This step is required if requesting reimbursement from any account that is **not a Health Savings Account (HSA)**.
7. Click on the **Save Expense** button.

8. Locate the expense you just created in the list and click on it.
9. Select or enter the reimbursement amount.
10. Select your preferred reimbursement method.
11. Click on the **Next** button.
12. Review the details of your request and click **Submit** if they're correct.

Your request is now submitted and will usually be processed within 2-3 business days.

- Reimbursement via bank direct deposit usually appears 3 business days after approval.
- Paper checks are delivered within 10 business days after the request approval.

You can check your claim's status any time by clicking on the **View Claims** button on your account dashboard.

Pay My Provider

1. Navigate to the account dashboard by clicking on the **Home** button at the top of the page.
2. Click on **Pay Provider**.
3. Select the account you want to pay from.
4. Choose 'Enter claim record and send payment' and click **Next**.
5. Select Pay Provider and click **Next**.
6. Choose whether you want to create a new expense or pay an expense already on file.
 - If creating a new expense, fill out the expense information and click **Next**.
 - If using an existing expense in the portal, select **Existing** and click **Next**.
7. Enter the provider information or find the provider from the dropdown list.
8. Select the payment amount and click **Next**.
9. Review the payment information for accuracy.
10. Agree to the terms and click **Finish**.

Mobile app

If the crew is on the HealthEquity app,¹ they would follow these steps:

1. Tap on the **Expenses** tab at the bottom of the screen.
2. Tap on the **Reimburse** button.
3. Check if the expense you want is already listed.
If it is, tap it and go to step 9.
4. If not, tap on **Create a New Expense**.
5. Fill out the details of your expense.
Note: 'Provider' can be either the name of your healthcare provider or the name of the clinic/vendor
6. If you have already made a payment for this, tap on **Attach a Payment** and select it.
7. Upload any receipts or invoices you have by tapping **Attach a Document**.
 - This step is required if requesting reimbursement from any account that is **not a Health Savings Account (HSA)**.
8. Tap on **Save Expense** when done.
9. Select the account you want to be reimbursed from and the amount.
10. Tap on your preferred reimbursement method.
11. Agree to the terms of service and tap **Submit Reimbursement**.

Your request is now submitted and will usually be processed within 2-3 business days.

- Reimbursement via bank direct deposit usually appears 3 business days after approval.
- Paper checks are delivered within 10 business days after the request approval.

You can check your claim's status any time by tapping on the **Expenses** button at the bottom of the screen.

Questions?

If you have any questions about submitting a claim online, our HealthEquity Member Services team is available 24/7 to help you with the process or to answer any account questions you have.

Give us a call at 866.346.5800.