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

After you log in, the list of common eligible expense items is found in **Help & Support**.

View your account balance, deposits and payments

- From the **Dashboard**, click on **Account Settings**.
- To view all of your claims, select **Claims**.
- To view all of your payments and deposits, select **Transactions**.

How to file a claim

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). Simply click **File A Claim** under **Account Actions**.

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

- Enter your claim information. To add additional claims, select **Add Another Claim**.
- Once you enter in all of your claims, click **Next**.
- Confirm all expense details and click **Next**. To make changes, click **Previous**.
- Select **Fax** or **Upload**.
  - To "Fax," click on **Create Coversheet**. Print and sign the form. Fax it with your documentation to the number on the coversheet. When you sign the fax coversheet, you certify that your claim is for an eligible expense.
  - To "Upload," use the **Browse** button. Select your documentation from your computer. To add additional documents, click on **Add Additional Document**. **Note:** Each document must be uploaded in PDF format.
- Check the signature box to sign your claim and confirm your submission is for an eligible expense.
- Click **Submit**.

*If you're an Aetna member, log in at **www.aetna.com**. Click **Access Your Account** to get to your PayFlex member website.

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How to file a claim (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**.
- Fill in your claim information and click **Next**.
- Verify that your claim information is correct. Click **Next**.
- Select **Fax** or **Upload**.
  - To "Fax," click on **Create Coversheet**. Print and sign the form. Fax it with your documentation to the number on the coversheet. When you sign the fax coversheet, you certify that your claim is an eligible expense.
  - To "Upload," use the **Browse** button. Select your documentation from your computer. To add additional documents, click on **Add Additional Document**. **Note:** Each document must be uploaded in PDF format.
- Click **Submit**.

Order an additional PayFlex Card®, your account debit card

You can order an additional card for your spouse or dependent.

- From the **Dashboard**, click on **Account Settings**.
- Then click **PayFlex Card**.
- Click on **Order a Dependent Card**.
- Enter the spouse or dependent name and click **Submit**.

Account notifications

- From the **Dashboard**, click on **Account Settings**.
- Click on the **Account Notification**.
- Enter your e-mail address and choose the notifications you wish to receive. You can also choose when and how you'd like to get them. Then click **Submit**.

For fast reimbursement, enroll in direct deposit

- From the **Dashboard**, click **Account Settings**. Then click on **Bank Accounts**.
- Select bank account type. Enter your account number, routing number and bank name. Click **Save and Continue**.
- Review your account information. If the information is correct, click **Confirm**. If you need to make a change, click **Previous**.

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