

How to reimburse yourself using the BenefitWallet® mobile app

If you made HSA-eligible purchases with your personal funds rather than through your HSA, you can quickly and easily reimburse yourself with the BenefitWallet mobile app, either with a paper check or electronic transfer. For an electronic transfer, you will need to know the account and routing numbers for your provider.



Log in to the BenefitWallet mobile app.

- If you have forgotten your User ID, tap *Forgot User ID*.
- If you have forgotten your Password, tap Forgot Password.
- If you have never logged in to the mobile app before, tap *Register*.



To get started with reimbursing yourself from your HSA:

- Tap *Reimburse Myself* on the home screen.
- Select the **Payment Type** by tapping *Electronic Transfer* or *Paper Check*.

- If reimbursing yourself by Electronic Transfer, you will need to indicate where you are depositing the funds. *If you have not set up Direct Deposit to a personal bank account, tap Edit Account and follow the prompts to add your banking information.*

- If reimbursing yourself by paper check, enter the mailing address for the check to be mailed.

• Enter the Amount To Reimburse and tap Continue.





Complete the next several screens to reimburse yourself from your HSA:

- Frequency: Select One time or Recurring.
 - One Time: Manually enter the date or tap the calendar icon and make a selection.
 - Recurring: If you select to have recurring reimbursements, select Start and End Dates.
- **Send On**: Indicate the issue date by manually entering the date or by tapping the calendar icon and making a selection.
- Attach Document: To help keep track of your expenses, you can attach any document from your phone or take a picture using your phone's camera.
- **Transaction Memo**: If reimbursing yourself by check, indicate text to be printed on both the check and the check stub (e.g., an invoice number or account number).
- Note to Payee: If reimbursing yourself by check, indicate text to be printed on the check for your reference (e.g., an invoice number or account number).

To finish reimbursing yourself from your HSA:

- Confirm you've entered all of the information correctly.
- Acknowledge the Sufficient Funds notice by tapping *I Agree*.
- A screen will display confirming your payment was successfully scheduled.

