

How to reimburse yourself using the BenefitWallet® mobile app

If you made eligible purchases with your personal funds, 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.

Step 1

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**.

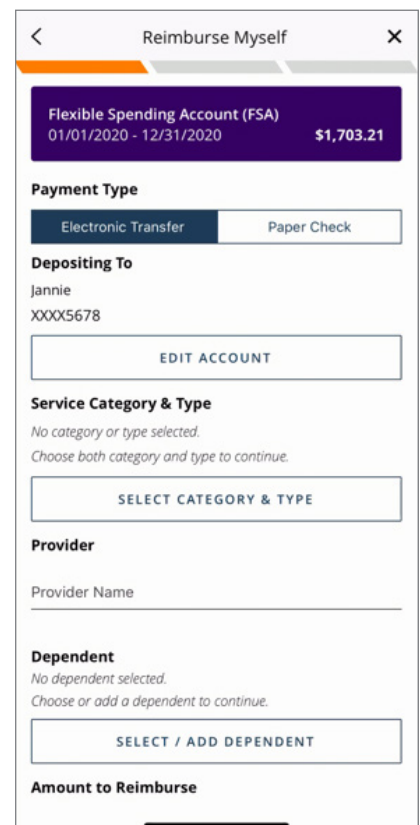
Step 2

To get started with reimbursing yourself from your account:

- Tap **Reimburse Myself** on the home screen.
- Select the **Payment Type** by tapping **Electronic Transfer** or **Paper Check**.
- **Depositing To:** This is how you will be reimbursed, depending on your type of payment:
 - 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. Note: You cannot change the mailing address on this screen.
- Tap **Category & Type** to select the category and type of service for your claim.
- **Provider:** Enter the name of the provider of the service.
- If you are reimbursing yourself on behalf of one of your dependents, tap **Select/Add Dependent**; otherwise skip this step.
- Enter the **Amount to Reimburse** and then tap **Continue**



The screenshot shows the 'Reimburse Myself' screen in the BenefitWallet app. At the top, there's a header with a back arrow, the title 'Reimburse Myself', and a close 'X' button. Below the header, a purple box displays 'Flexible Spending Account (FSA)' with the dates '01/01/2020 - 12/31/2020' and a balance of '\$1,703.21'. The 'Payment Type' section has two buttons: 'Electronic Transfer' (selected) and 'Paper Check'. The 'Depositing To' section shows 'Jannie' and 'XXXX5678' with an 'EDIT ACCOUNT' button. The 'Service Category & Type' section has a message 'No category or type selected. Choose both category and type to continue.' and a 'SELECT CATEGORY & TYPE' button. The 'Provider' section has a 'Provider Name' input field. The 'Dependent' section has a message 'No dependent selected. Choose or add a dependent to continue.' and a 'SELECT / ADD DEPENDENT' button. At the bottom, there's an 'Amount to Reimburse' input field.

Step 3

Complete the next several screens:

- **Start Date/End Date:** Indicate the start and end dates for the service by manually entering the dates or by tapping the calendar icon and making a selection.
- **Attach Document:** Attach and upload one or more documents to support your claim from your phone or take a picture using your phone's camera; this is a required field.
- **Transaction Memo:** If reimbursing yourself with a paper check, enter any text to be printed on both the check and the check stub (e.g., an invoice number or account number).

To finish reimbursing yourself from your account:

- 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.

Reimburse Myself

Category: Vision
Type: Required Eye Surgery
Provider Name
Dr Smith
Dependent
Jane
Start & End Dates of Service
Start Date
03/05/2020
End Date
03/05/2020
Attach Document
Please provide documentation that supports your claim
ATTACH
Transaction Memo
Prints on Check Stub only
CONTINUE

Reimburse Myself

Flexible Spending Account (FSA)
01/01/2020 - 12/31/2020
\$1,703.21
Reimbursement Summary
Payment Type
Electronic Transfer
Depositing To
XXXX5678
Provider
Dr Smith
Dependent
Jane
Category
Vision
Type
Required Eye Surgery
Start & End Dates of Service
03/05/2020 - 03/05/2020
Reimbursement Amount
\$2500.00
SUBMIT

Reimburse Myself

Flexible Spending Account (FSA)
01/01/2020 - 12/31/2020
\$1,703.21
Please make sure that there are sufficient funds in your account.
Once you click on I Agree, you may edit or delete this reimbursement in the BenefitWallet web application up until 5pm Eastern Time on the Issue Date for that payment. Reimbursements become final after the Issue Date. Allow 5-7 business days after Issue Date for your reimbursement to post your account.
Your account balance is increased or decreased when an electronic deposit transfer posts to your account or when the reimbursement is received and
CANCEL I AGREE
SUBMIT

Reimburse Myself

Pending approval, \$2500.00 will be deducted from your FSA and sent via electronic transfer to
XXXX5678 (Jannie)
You're all done here!
CLOSE

Adding personal banking information for electronic transfers

If reimbursing yourself by Electronic Transfer, you need to indicate where you are depositing the funds. If you have not set up Direct Deposit to a personal bank account, follow the steps below to add your personal banking information.

- **Account Type:** Tap **Checking** or **Savings** to indicate where the funds will be deposited.
- **Account Nickname:** Enter a nickname to easily identify the account.
- **Routing Number:** Enter the routing number for the checking or savings account.
- **Account Number:** Enter the account number for the checking or savings account.
- **Confirm Account Number:** Confirmation of the account number.

Tip: If using a checking account to deposit your reimbursement, have a blank check handy to easily access the account and routing numbers.

The screenshot shows a mobile app interface for "Direct Deposit Details". At the top, there's a back arrow and the title "Direct Deposit Details". Below the title, a section labeled "Direct Deposit Details" explains that these details are required for electronic transfers. Under "Account Type", there are two buttons: "Checking" (highlighted in dark blue) and "Savings". The form then has four input fields: "Account Nickname" with the value "Jannie", "Routing Number" with "011001234", "Account Number" with "12345678", and "Confirm Account Number" with "12345678". At the bottom, there's a "U.S. Check" illustration showing a check with labels for "Routing" and "Account" numbers.