

How to file a claim in your online account

Participant content

This article outlines how to file a claim in your online account to reimburse yourself.

Note: Do not file claims for expenses paid with your WEX benefits card, as this could result in duplicate claim payments.

Additional resources

- To watch a video tutorial, click [here](#).
- To pay a provider instead, see [How to send a reimbursement check directly to a provider in your online account](#).
- You can also use the WEX benefits mobile app to file a claim and upload documentation. See [How to file a claim in the WEX benefits mobile app](#) for instructions.

To file a claim in your online account, complete the following steps:

1. Log in to your online account.
2. Navigate to the Home tab and click the applicable option in the I Want To section.

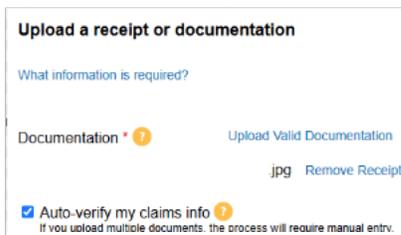
Scenario	Action
You want to reimburse yourself for out-of-pocket expenses.	Click "Reimburse Myself."
You want to pay a service provider directly.	Click "Send Payment."

3. Click "Upload Valid Documentation."



Note: Depending on your plan type, you may have the option to select "Auto-verify my claims info" box. This option will analyze the document uploaded and advise if there is missing required information. If the document is valid and complete, the claim form will be auto-filled.

Important: This option is only available on medical plans.



4. Click "Browse for a file," select the file containing your receipt, and click "Open" and then "Submit."

Important: Receipts must be in a JPG, JPEG, GIF, PNG, or PDF format and cannot exceed 20 MB.

5. Click "Next."
6. Complete the required fields and then click "Next."

Scenario	Action
You have multiple account types.	Select the correct category and type to file the claim under the correct account. Example: If your HRA only allows medical deductibles to be reimbursed, select "Medical Expenses" under Category and "Medical Deductible" under Type.

7. Review your transaction summary. If changes are needed, click "Update." Then click "Submit."

Important: If you have multiple account types, confirm the claim is filed under the correct plan type before clicking "Submit."

Transaction Summary (1)

FROM	TO	EXPENSE	AMOUNT	APPROVED AMOUNT	
+ Medical FSA 01/01/2021-12/31/2021	Me	Over-the-Counter Products	\$10.00	\$10.00	Remove Update
Total Amount			\$10.00	\$10.00	

Cancel Save for Later Add Another Submit

8. Review the Claims Terms and Conditions and check the box indicating you have read, understand, and agree to them. Then click "Submit."

Claims Terms and Conditions ✔ Agreed

I have read, understand, and agree to the Terms and Conditions.

Cancel Save for Later Add Another Submit

Notes

- You will receive a confirmation message that verifies the claim was successfully submitted.

Confirmation Print Confirmation

Your claim has been successfully submitted.

Successfully Submitted

FROM	TO	AMOUNT	APPROVED AMOUNT	RECEIPT STATUS
+ Medical FSA 01/01/2021-12/31/2021	Me	\$10.00	\$10.00	Uploaded(1) Upload another Receipt
TOTAL APPROVED AMOUNT			\$10.00	

- Your documentation will be processed within two business days.

Scenario	Resolution
The claim is approved.	A reimbursement will be issued via direct deposit on the third business day.
You do not have direct deposit set up.	<p>A check will be mailed on the third business day if the reimbursement amount is \$25 or more.</p> <p>If the reimbursement amount is \$24.99 or less, your reimbursement will be issued after you submit additional claims to bring your total to at least \$25 or at the end of the month. See How to set up direct deposit in your online account for more information.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> <p>⚠ This claim will not be paid until the sum of your claims pending reimbursement reaches a minimum of \$25.00. If the minimum amount has not been reached by 12/30/2022, the claim will be reimbursed at that time.</p> </div>

- You will be notified if further documentation is needed. If you have an email address on file, you will be notified via email. Otherwise, you will be notified by mail.
- Once a claim has been filed, it cannot be canceled.