

## PayFlex Mobile<sup>®</sup> App

### Don't go another day without our mobile app

Get access to your PayFlex<sup>®</sup> account with our free\* PayFlex Mobile application. This app makes it easy to manage your account. It's available for iPhone<sup>®</sup> and iPad<sup>®</sup> mobile digital devices, and Android<sup>™</sup> application.

### Getting started is easy

First, you'll need to create a user name and password. You'll use the same user name and password for the app, as you do to access your PayFlex member website. If you already have a user name and password, skip to step 4 (below).

1. To create a user name and password, go to **payflex.com**.
2. Click **Sign In**, located at the top right corner.
3. Click **Create Your Profile** and complete the required fields.
4. From your mobile app store, download PayFlex Mobile.
5. After you log in to the app, you'll see **My Dashboard**. This connects you to:
  - Financial Center
  - My Resources
  - Alerts
  - Contact Us

### Using the mobile app features

#### Financial Center

You can view your account information and request reimbursement for your out-of-pocket expenses.

#### View account information:

To get started, select the account you wish to view.

- If you have a **reimbursement account**, you can:
  - **View all of your transactions in one list.** Select **Claims** or **Deposits** to narrow your view.
  - **View the details of your transactions.** Select the transaction you wish to view.
  - **View a summary of your account.** On the Details page, select the account to view a summary.
  - Select **File Claim** to submit claims to PayFlex. Simply upload an image of your documentation.
- If you have a **health savings account (HSA)**, you can:
  - Use the **Deposit** feature to contribute funds to your HSA.
  - Use the **Withdrawal** feature to request reimbursement for your out-of-pocket expenses.
  - Use the **Payment** feature to pay your health care provider directly for the amount you owe.
  - **View all of your transactions in one list.**
  - **View the details of your transactions.** Select the transaction you wish to view.
  - **View a summary of your account.** On the Details page, select the account to view a summary.

\*Standard text messaging and other rates from your wireless carrier still apply.

## My Resources

You can view a list of common eligible expenses. You can also view any agreements and terms of use that we have sent to you.

- Select **Expenses** and choose the expense list you wish to view.
- Select **Documents Center** and choose the document you wish to view.

## Alerts

If you see an alert, select it to view more details. If you have a PayFlex reimbursement account, here are the alerts you may see on the mobile app.

### Alert: Claims requiring substantiation

You may see this if your employer offers the PayFlex Card®, your account debit card. This red alert message will let you know if we need documentation for a debit card purchase.

- To take action, select **Learn More**.
- You can upload your documentation on the app. Select the **Add Photo** image.
- Take a photo of your documentation or choose the image from your photo library. Make sure your photo clearly shows the date of service, the amount of purchase, a description of the product or service, the name of the merchant or provider and, if applicable, the name of the patient.
- If the photo isn't clear, select **Cancel**.
- If the photo is clear and readable, select **Choose**.

### Alert: Claims payments

After you submit a claim, you'll see an alert message confirming the amount and when you can expect reimbursement. This shows after we process and approve your claim. Simply select the alert to view the details.

## Contact us

You have a number of ways to contact us. Through the app, you can view our toll-free customer service number, fax number and mailing address; our customer service hours; and the member website.

## Questions?

Log in to your PayFlex member website and click **Help & Support**. We're here to help Monday – Friday, 8 a.m. – 8 p.m. ET and Saturday, 10 a.m. – 3 p.m. ET.

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