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ARTICLE PROD-2113

How to file a claim in your online account

Participant

Client


PS Agent

Client Agent



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

Note: Don't 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." 

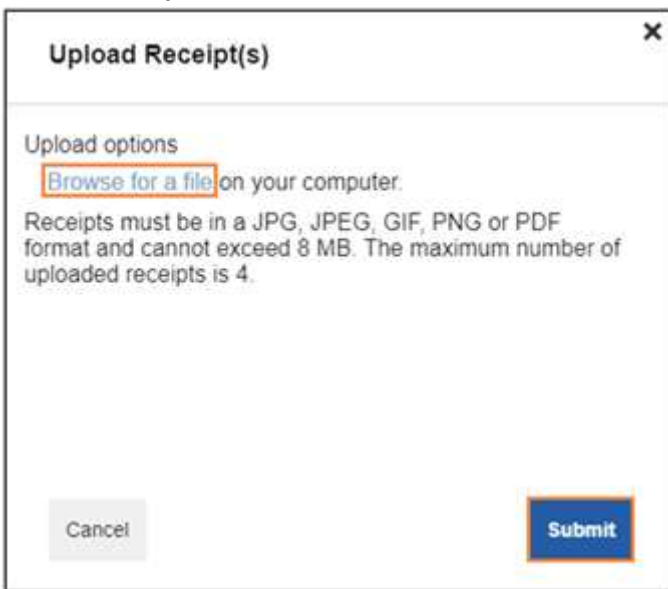
3. Click "Upload Valid Documentation."



The screenshot shows a web form titled "Receipt / Documentation" with a "* Required" indicator. Below the title, there is a label "Receipt(s) *" with an information icon. To the right of this label is a button labeled "Upload Valid Documentation", which is highlighted with an orange border. Below this is a "Summary" section containing two rows: "Pay From" with the value "Medical" and "Pay To" with the value "Me". At the bottom left is a "Cancel" button, and at the bottom right are "Previous" and "Next" buttons, both highlighted with yellow borders.

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

Note: Receipts must be in a JPG, JPEG, GIF, PNG or PDF format and can't exceed 8 MB.



The screenshot shows a dialog box titled "Upload Receipt(s)" with a close button (X) in the top right corner. Inside the dialog, under the heading "Upload options", there is a button labeled "Browse for a file" highlighted with an orange border, followed by the text "on your computer." Below this, a message states: "Receipts must be in a JPG, JPEG, GIF, PNG or PDF format and cannot exceed 8 MB. The maximum number of uploaded receipts is 4." At the bottom left is a "Cancel" button, and at the bottom right is a "Submit" button highlighted with an orange border.

5. Click "Next."

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

Claim Details

* Required

Start Date of Service *

mm/dd/yyyy

End Date of Service

mm/dd/yyyy

Amount *

\$

Provider *

Category *

Select a category...

Type *

Select a type...

Description

If the category is 'Other' or 'Over-the-Counter Drugs', you must provide a description.

Recipient *

Scott Johnson

Add Dependent

Did You Drive To Receive This Product/Service? *

Yes

No

Summary

Pay From

Medical

Pay To

Me

Documentation Uploaded

Yes

Cancel

Previous

Next

7. Review your transaction summary. If changes are needed, click "Update." Then click "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](#)

Notes

- You'll receive a confirmation message that verifies the claim was successfully submitted. Your documentation will be processed within two business days. If the claim is approved, a reimbursement will be issued via direct deposit on the third business day. If you don't have direct deposit set up, a check will be mailed on the third business day. See [How to set up direct deposit in your online account](#) for more information.

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	

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

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