

How to file a claim in your online account

Important: This article contains steps that require you to log in to your account.

See [How to log in to your Benefits online account](#) for instructions.

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

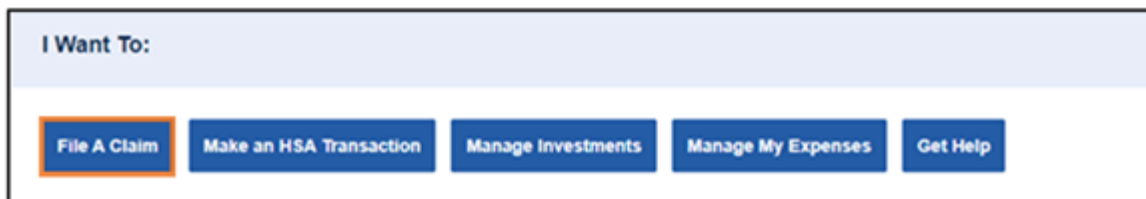
Note: Don't file claims for expenses paid with your WEX benefits card, as this could result in duplicate claim payments.

Additional resources

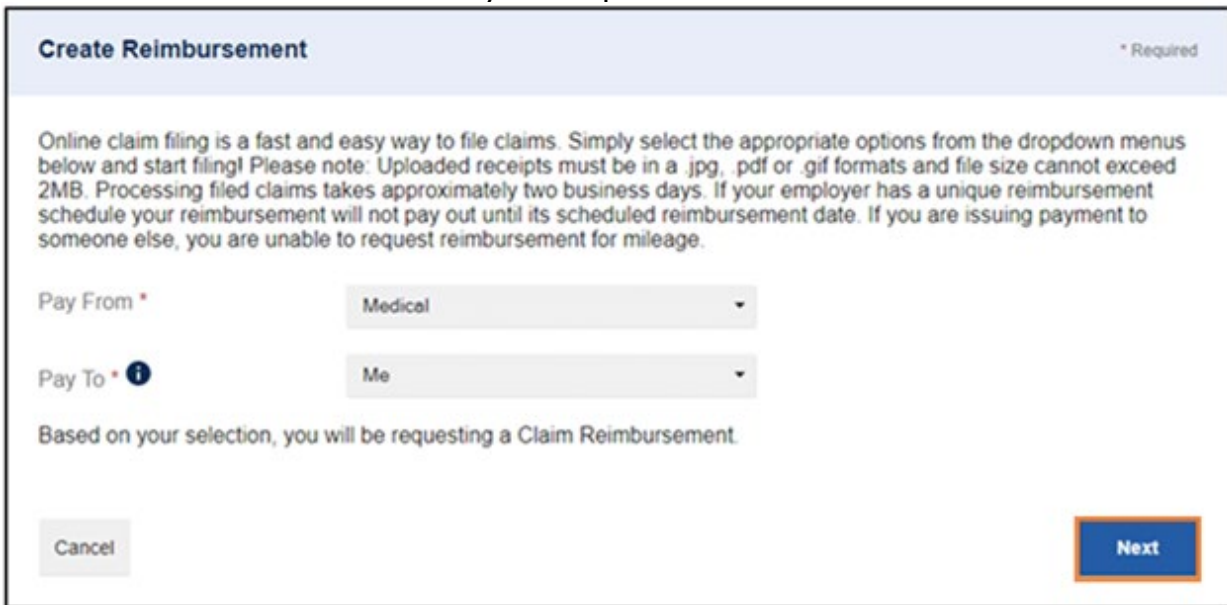
- To watch a video tutorial, [click here](#). 
- To pay a provider instead, see [How to send a reimbursement check directly to a provider in your online account](#).
- You can also use the WEX benefits mobile app to file a claim and upload documentation. See [How to file a claim in the Benefits Mobile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

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

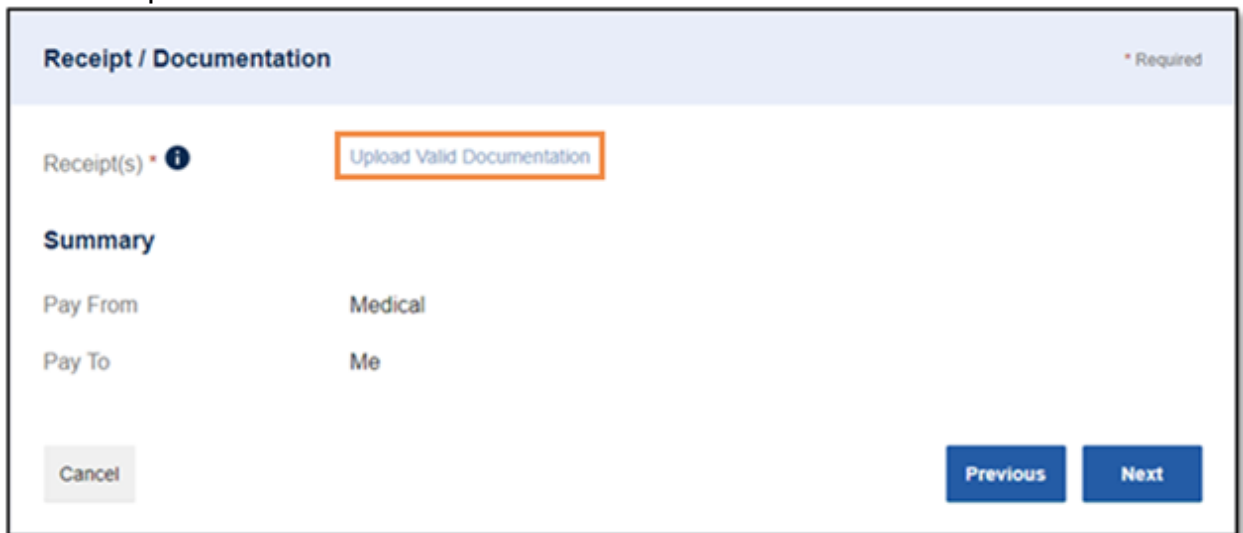
1. Log in to your [online account](#).
2. Click "File A Claim" in the I Want To section of the Home tab.



3. Select which account you'd like to be reimbursed from in the Pay From drop-down list. Select "Me" from the Pay To drop-down list and then click "Next."



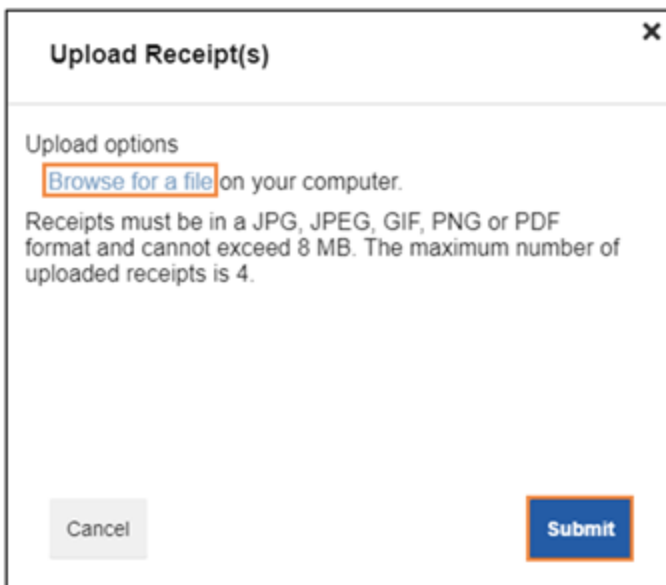
4. Click "Upload Valid Documentation."



The screenshot shows a web form titled "Receipt / Documentation" with a light blue header. In the top right corner of the header, there is a red asterisk and the word "Required". Below the header, the text "Receipt(s) * i" is displayed. To the right of this text is a button labeled "Upload Valid Documentation", which is highlighted with an orange rectangular box. Below this section is a "Summary" section containing two rows: "Pay From" with the value "Medical" and "Pay To" with the value "Me". At the bottom left of the form is a "Cancel" button. At the bottom right are two blue buttons labeled "Previous" and "Next".

5. 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 modal dialog box titled "Upload Receipt(s)" with a close button (X) in the top right corner. Inside the dialog, the text "Upload options" is followed by a link "Browse for a file" which is highlighted with an orange rectangular box, and the text "on your computer." Below this, a paragraph 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 of the dialog is a "Cancel" button. At the bottom right is a blue button labeled "Submit", which is highlighted with an orange rectangular box.

6. Click "Next."

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

Claim Details* Required

Start Date of Service *



End Date of Service



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

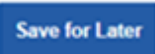
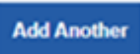
Previous

Next

8. 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 
Total Amount			\$10.00	\$10.00	



9. You'll receive a confirmation message that verifies the claim was successfully submitted. Your documentation will process within two business days. Reimbursement will issue as a direct deposit or mail as a check, depending on your plan setup.

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	

Note: 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.