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How to file a claim in your online account

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

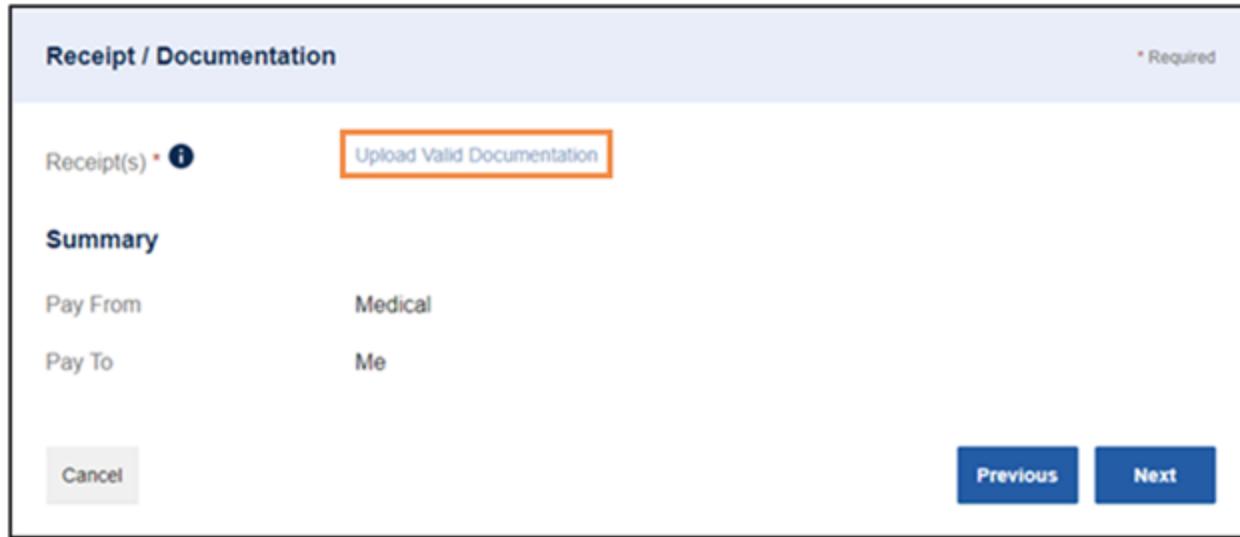
- To watch a video tutorial, click [here](#).
- To pay a provider instead, see [How to send a reimbursement check directly to a provider in your online account](#).
- You can also use the WEX benefits mobile app to file a claim and upload documentation. See [How to file a claim in the WEX benefits mobile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



The screenshot shows a step in the WEX benefits online account process. The title is 'Receipt / Documentation' with a note 'Required'. On the left, there is a 'Receipt(s)' field with a question mark icon and a summary table. The summary table shows 'Pay From' as 'Medical' and 'Pay To' as 'Me'. At the bottom are 'Cancel', 'Previous', and 'Next' buttons.

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 8 MB.

Upload Receipt(s)

Upload options

[Browse for a file](#) on your computer.

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.

[Cancel](#) [Submit](#)

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. <u>Example:</u> 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](#)

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.	A check will be mailed on the third business day if the reimbursement amount is \$25 or more. 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. <small>!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 12/31/2022, the claim will be reimbursed at that time.</small>

- 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.

You can view this article at:

<https://wexbenefitskb.egain.cloud/system/templates/selfservice/dbika/help/agent/locale/en-US/portal/308900000001002/content-version/PROD-2113/PROD-89341/How-to-file-a-claim-in-your-online-account?query=how%20to%20file%20a%20claim>

