How to file a claim in the WEX Benefits mobile app

This article outlines how to file a claim for reimbursement in the WEX benefits mobile app. To watch a video tutorial, click here. ▇◀

See Getting started with the WEX benefits mobile app for more information. You can also log in to your online account to file a claim and upload your documentation. See How to file a claim in your online account for instructions.
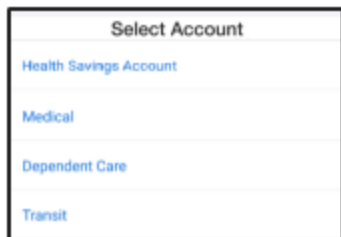
<u>Note</u>: Do not file claims for expenses paid with your benefits debit card, as this could result in duplicate claim payments.

To file a claim in the benefits mobile app, complete the following steps:

1. Tap "Reimburse Myself" or "Send Payment."
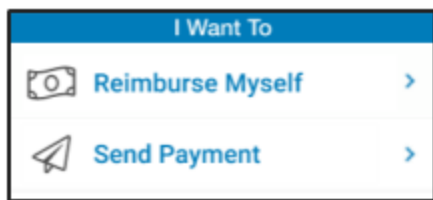
<u>Note</u>: If you have multiple accounts, you will be asked to select the one from which you are requesting reimbursement.

2. Complete the applicable step:
   - If you are reimbursing yourself, tap "Add Bank Account" or tap an existing payment method from the list.

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- If you are sending a payment, tap "Add New Payee" or select an existing one from the list.
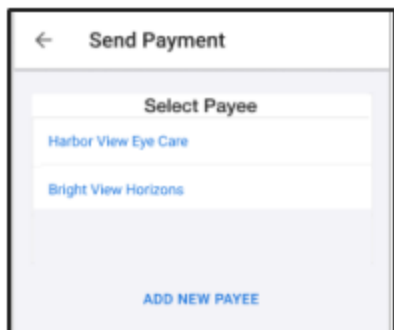

3. Complete the required fields on the Claim Details screen.

4. Scroll down and then tap "Upload Receipt" to upload the documentation associated with your claim.

Note: The camera on your device will automatically activate to allow you to take a picture of your documentation, or you may upload a document from your storage files or a picture from your camera roll. If you have receipts saved in your receipt organizer, you can access them by clicking "Receipt Organizer."

5. After the documentation is added to the claim and you agree to the terms and conditions, tap "Submit" to submit the claim for processing.
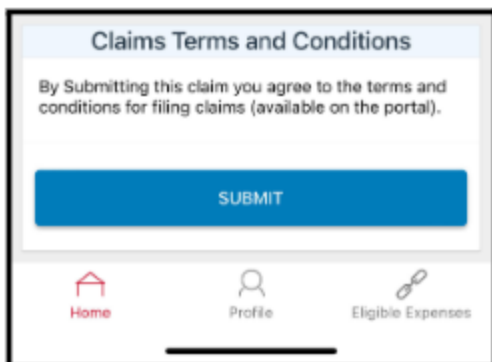
Notes

- Your documentation will process within two business days. Reimbursement will be issued as a direct deposit or mailed as a check, depending on your plan setup.
- 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.