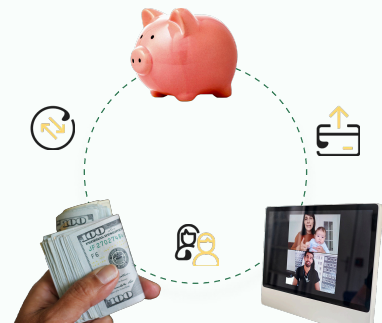


Claim Sync

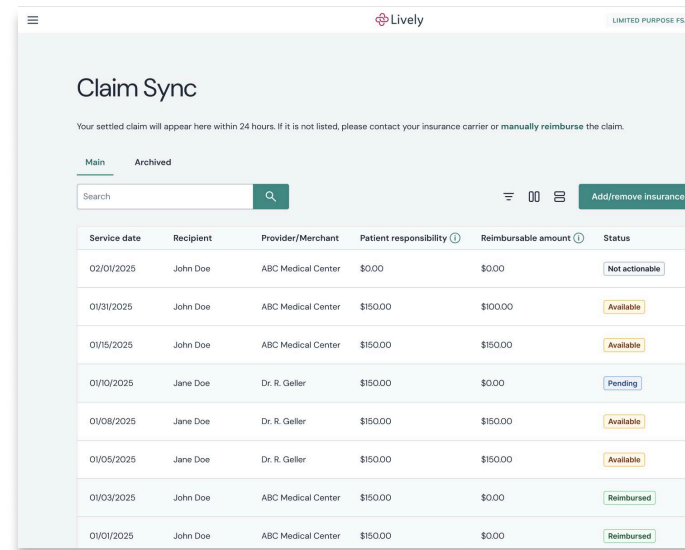
Claims integration feature overview



Reimbursements, substantiation shouldn't be frustrating or confusing

Claim Sync securely connects claims from employees' health plans into their Lively HSA, FSA, and/or HRA. Employees don't have to track down receipts, and HR teams spend less time dealing with delays or questions about reimbursements and substantiations.

Claim Sync is compatible with **95% of insurance plans used by all insured employees across the U.S.** — so employers can rest assured that there will be continuity in the employee benefits experience, even if switching insurance plans.



Service date	Recipient	Provider/Merchant	Patient responsibility	Reimbursable amount	Status
02/01/2025	John Doe	ABC Medical Center	\$0.00	\$0.00	Not actionable
01/31/2025	John Doe	ABC Medical Center	\$150.00	\$100.00	Available
01/15/2025	John Doe	ABC Medical Center	\$150.00	\$150.00	Available
01/10/2025	Jane Doe	Dr. R. Geller	\$150.00	\$0.00	Pending
01/08/2025	Jane Doe	Dr. R. Geller	\$150.00	\$150.00	Available
01/05/2025	Jane Doe	Dr. R. Geller	\$150.00	\$150.00	Available
01/03/2025	John Doe	ABC Medical Center	\$150.00	\$0.00	Reimbursed
01/01/2025	John Doe	ABC Medical Center	\$150.00	\$0.00	Reimbursed

Simplify spending, reimbursements, and substantiation for employees



Employees can choose to take advantage of Lively's claims integration feature and enjoy:

Faster, automated reimbursements

Claim Sync pre-fills most of the reimbursement form using data from the insurance claim—saving time, reducing errors, and minimizing back-and-forth.

Built-in organization to stay on top of claims

The easy-to-use dashboard automatically populates and categorizes new claims for reimbursement, and claims employees have already taken action on.

Easy substantiation

85%+ of FSA and HRA transactions with the Lively VISA Benefit Access Card are auto-substantiated. For the rest, Claim Sync makes manual substantiation fast and easy, so employees don't have to fill out fields one-by-one.



Help employees take control of healthcare transactions with greater convenience and ease. Employers can opt in to Lively Claim Sync at **no additional cost** during implementation.