



## How to make a payment to your provider or yourself

### 1. Enter payment information

The screenshot shows the BenefitWallet Claim Center interface. At the top, there are navigation tabs: My Account, Claim Center (selected), Communication Center, FAQs, and Help Center. A 'QUICK LINKS' sidebar on the left lists: Claim Center, Make a Payment / Add a Claim, Schedule Claim Payment, Filing Cabinet, and View Reimbursement Schedule. The main content area is titled 'Claim Center' and 'Claim Summary'. It features a table 'My Paid Claims by Account (12 mos)' with one entry: HSA, \$434.10. To the right is a bar chart 'My Spending by Month' showing spending for SEP 13 and OCT 13. A 'Home' and 'Log Out' button is in the top right. Below the main content, a progress bar shows: Enter Claim Details (active), Review Submission, Documentation, and Submit for Payment. The 'Enter Claim Details' section has two options: 'Submit Now' (selected) and 'Save for Later'. The 'Submit Now' option includes the text 'Yes! This claim is an immediate payment request.' The 'Save for Later' option includes 'I want to save this claim to my Filing Cabinet and submit it later.' Below this is a 'New Claim' form with fields for Service For (CHARRON, GLEN A (Default)), Claim Amount, Vendor/Provider, and Date of Service. A 'Home' and 'Log Out' button is also present in the bottom right of the interface.

**Go to the claims center to initiate payments. Select "Make a Payment/ Add a Claim" for a new payment or reimbursement.**

**Quick tip:** Select "Schedule Claim Payment" to schedule a future or recurring payment.

Enter your payment or claim details, including amount, date and select your preferred method of payment. To add a new payee, select "Add New Payee," then continue. Select your name from the 'Pay To' drop down menu to reimburse yourself.

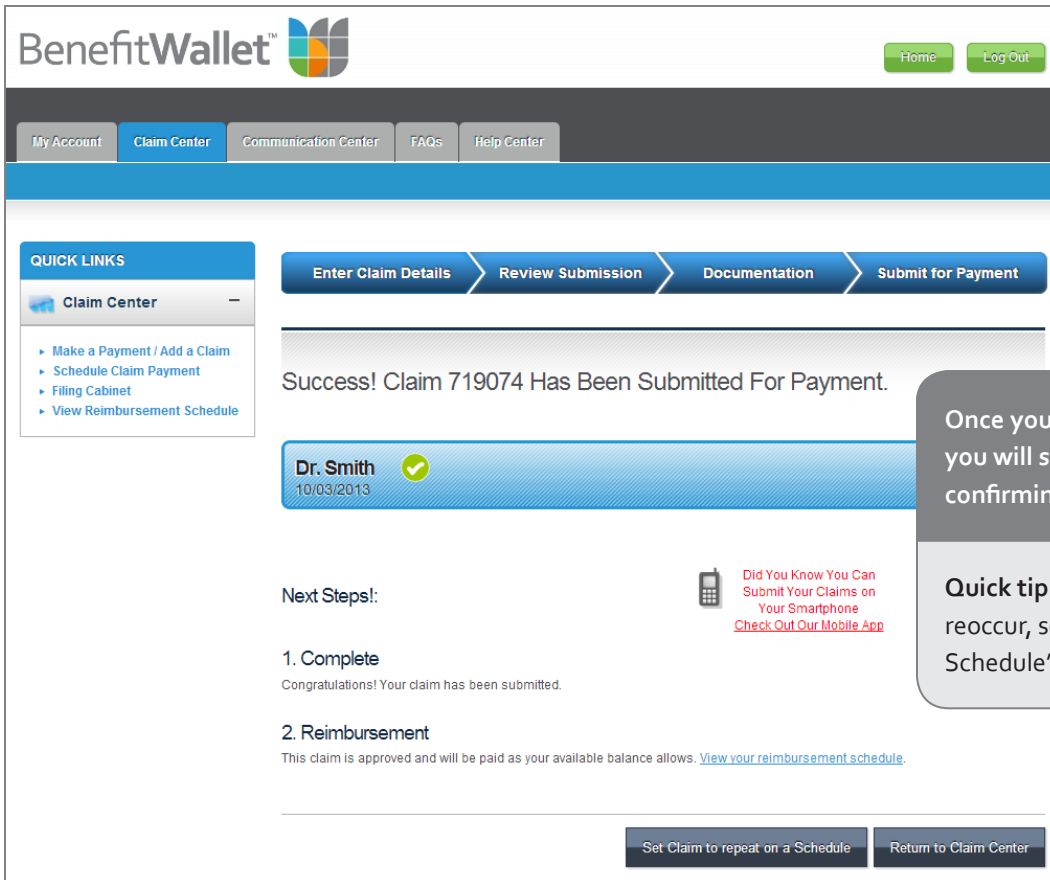
**Quick tip:** To electronically reimburse yourself, add direct deposit information by using the "Direct Deposit" Quick Link.

## 2. Upload and save documentation (optional)

The screenshot shows the 'Review Submission' page in the BenefitWallet system. At the top, there is a navigation bar with 'My Account', 'Claim Center', 'Communication Center', 'FAQs', and 'Help Center'. A secondary navigation bar contains 'Home' and 'Log Out' buttons. Below this is a 'QUICK LINKS' section for the 'Claim Center' with links for 'Make a Payment / Add a Claim', 'Schedule Claim Payment', 'Filing Cabinet', and 'View Reimbursement Schedule'. A progress bar at the top of the main content area shows four steps: 'Enter Claim Details', 'Review Submission' (the current step), 'Documentation', and 'Submit for Payment'. The main content area displays claim details for 'Dr. Smith' on '10/03/2013' with a value of '\$52.50'. Below this, a table lists 'Service For' (CHARRON, GLEN A), 'Service Type' (Allergy Treatment), 'Description', and 'Pay To' (CHARRON, GLEN A (Direct Deposit)). A note states: 'This claim will be paid from your HSA and does not require documentation.' An 'Edit Claim Details' button is located to the right of the claim details. At the bottom of the page, there are buttons for '<< Go Back', 'Save/Exit', 'Delete Claim', and 'Continue >>'. A grey callout box on the right side of the page contains the text: 'Review your submission and continue.'

The screenshot shows the 'Documentation Options' page in the BenefitWallet system. The navigation and progress bar are identical to the previous screenshot. The main content area displays the same claim details for 'Dr. Smith' on '10/03/2013' with a value of '\$52.50'. A note states: 'This claim does not require documentation'. Below this, there is a section titled 'Documentation Options' with the following text: 'Documentation is not required for the payment of this claim. However, you can upload supporting documentation for your recordkeeping purposes. [What is acceptable documentation?](#) [Why would I do this?](#) Choose a submission option.' There are two radio button options: 'Upload Online' (with an unselected radio button) and 'No Thanks' (with a selected radio button). Below the 'Upload Online' option is the text: 'Easy! Browse and upload image files from your computer.' Below the 'No Thanks' option is the text: 'I will skip the documentation step.' A grey callout box on the left side of the page contains the text: 'Upload documentation, if you choose to save your receipts online, or select "No Thanks" and continue to the next step.'

## 2. Receive confirmation



The screenshot shows the BenefitWallet website interface. At the top left is the BenefitWallet logo. To the right are 'Home' and 'Log Out' buttons. Below the logo is a navigation bar with 'My Account', 'Claim Center', 'Communication Center', 'FAQs', and 'Help Center'. A 'QUICK LINKS' sidebar on the left lists: 'Claim Center', 'Make a Payment / Add a Claim', 'Schedule Claim Payment', 'Filing Cabinet', and 'View Reimbursement Schedule'. A progress bar at the top of the main content area shows four steps: 'Enter Claim Details', 'Review Submission', 'Documentation', and 'Submit for Payment'. The main content area displays a success message: 'Success! Claim 719074 Has Been Submitted For Payment.' Below this is a user profile for 'Dr. Smith' with a green checkmark and the date '10/03/2013'. Under 'Next Steps!', there are two items: '1. Complete' with the text 'Congratulations! Your claim has been submitted.' and '2. Reimbursement' with the text 'This claim is approved and will be paid as your available balance allows. [View your reimbursement schedule.](#)'. To the right of the 'Next Steps' is a mobile app icon and the text 'Did You Know You Can Submit Your Claims on Your Smartphone [Check Out Our Mobile App](#)'. At the bottom right are two buttons: 'Set Claim to repeat on a Schedule' and 'Return to Claim Center'.

Once you've submitted your payment, you will see a confirmation screen, confirming the success of your payment.

**Quick tip:** If you want this claim to reoccur, select "Set Claim to repeat on a Schedule".

### For more information

Contact the BenefitWallet Service Center at 1.866.686.4798.

