

TexFlex online claim submission guide

TEXFLEXSM
PAYFLEX[®]



TexFlex online claim submission guide

How to submit eligible claims to PayFlex

This guide provides you with helpful information related to your TexFlex flexible spending account (FSA). Whether you need to pay yourself back or pay a provider from your TexFlex account funds, you can easily submit your claims online via the TexFlex member website – www.TexFlexERS.com.

Read through this guide for step-by-step instructions on how to file your eligible claims and upload proper documentation. This guide includes 2 sections:

- How to file a claim by sending payment to yourself
- How to file a claim by sending payment to a provider

Keep in mind, your claim **must include** supporting documentation. The preferred type of supporting document for a health care or limited-purpose claim is an explanation of benefits (EOB) from your medical, dental or vision coverage carrier. For dependent care, or if you don't have an EOB, you can send a detailed receipt or statement that includes the following:

- Date of service
- Final amount you had to pay
- Description of service/item received
- Name of merchant or provider
- Name of patient (if applicable)

Your TexFlex account member website

www.TexFlexERS.com

1. Visit **www.TexFlexERS.com**.
2. Click **LOGIN** at the top of your screen.
3. Enter your username and password, then select **LOGIN**.
4. If this is your first-time logging in, select **CREATE PROFILE** to register your account.

The screenshot shows the top of the TexFlex website. The header includes the 'TEXFLEX' logo, 'PAYFLEX', and navigation links for 'ERS Website', 'What's New', 'Program Resources', 'Forms', and 'FAQs'. A blue 'LOGIN' button is circled in red. Below the header is a large banner with a family photo and the text 'Save money on taxes by enrolling in TexFlex!'. A teal section below the banner contains 'What's New' information about the program starting in 2021.

The screenshot shows the login page with the heading 'Select your secure login'. On the left, there are three options: 'Member >', 'Employer', and 'Broker/Consultant'. The 'Member >' option is selected. The 'Member Login' section contains two input fields: 'USERNAME' (with the placeholder 'Enter your username') and 'PASSWORD' (with the placeholder 'Enter your password' and a visibility icon). A red 'LOGIN' button is circled in red. Below the password field are links for 'Forgot username?' and 'Forgot password?'. To the right, the 'New to PayFlex?' section has a teal 'CREATE PROFILE' button circled in red. Below that is a 'Trouble logging in?' section with contact information.

The screenshot shows the 'Summer Enrollment' section. It features a pink piggy bank image and text explaining the enrollment period for health care and flexible spending accounts (FSAs). A blue button labeled 'VIEW ENROLLMENT RESOURCES' is visible at the bottom of the section.

After you log into www.TexFlexERS.com, you'll see your account dashboard.

- Scroll to the TexFlex account you wish to submit a claim for.
- Click **File a claim** under *Account Actions*.

The screenshot displays the PAYFLEX account dashboard for a user named JASON. The dashboard is divided into two main sections: Dependent Care and Healthcare (FSA). Both sections show account balances, annual election amounts, deposits, and spent funds. The 'File a claim' link is highlighted with a red circle in the 'Account Actions' section of both accounts.

PAYFLEX Home Help & Support Account Settings Logout
Your Accounts Alerts & News Health Plan Claims (3) Documents & Forms

Hello, JASON **TEXFLEX**

Dependent Care

9/1/2020 - 8/31/2021 [Change Plan Year](#)
Employees Retirement System of Texas

\$2,815⁰¹ available funds [?](#)

\$2,815.01 available funds

Annual election ?	\$5,000.00
Deposits ?	\$2,625.00
Spent Funds ?	(\$190.01)

Last day to spend funds [?](#) **Last day to file claims** [?](#)
November 15, 2021 December 31, 2021

Account Actions
[View account details >](#)
[File a claim >](#)
[Link a bank account >](#)
[Set up account notifications >](#)

Quick Tips
Explore eligible expenses. Find out what you can pay for with your PayFlex account.

Healthcare (FSA)

9/1/2020 - 8/31/2021 [Change Plan Year](#) **Urgent action needed** [!](#)
Employees Retirement System of Texas

\$2,525⁰¹ available funds [?](#)

\$2,525.01 available funds \$174.99 spent funds

Annual election ?	\$2,500.00
Remaining carryover amount ?	\$25.01
Spent Funds ?	\$174.99

Last day to spend funds [?](#) **Last day to file claims** [?](#)
August 31, 2021 December 31, 2021

Account Actions
[View account details >](#)
[File a claim >](#)
[Link a bank account >](#)
[Set up account notifications >](#)

Quick Tips
Explore eligible expenses. Find out what you can pay for with your PayFlex account.
Your employer allows you to carry over all your unused funds into the next plan year. [?](#)

Tell us about your request

After you click **file a claim**, select your expense type.

- Enter the amount and date of your expense.
- Click **Continue**.

Then, you'll have a chance to edit, or remove your expense, or add another expense. When you are all set, you can click **Continue**.

Request funds – File a claim

1 Tell us about your request

*Indicates a required field

Expense type*

Medical

Amount* Enter dollar amount

Date of expense* MM/DD/YYYY

CONTINUE

2 Where should we send your funds?

3 How will you send your documents to us?

4 Confirm and submit

Request funds – File a claim

1 Tell us about your request

Expense type	Amount	Expense date	Name		
Medical	\$50.00	12/18/2019 - 12/18/2019		Edit	Remove

ADD ANOTHER EXPENSE **CONTINUE**

2 Where should we send your funds?

3 How will you send your documents to us?

4 Confirm and submit

Where should we send your funds?

Choose where to send your funds, you have 2 options:

- Pay yourself back by selecting **Send me a check** (see page 7), or you can
- Send funds to a provider by selecting **Send funds to someone else** (see page 14)

The screenshot shows a multi-step form. Step 1 is 'Tell us about your request'. Step 2 is 'Where should we send your funds?' and is highlighted with a light pink background. It contains the instruction 'Choose one of the options below.' and three radio button options: 'Link a bank account - it helps you get your funds faster!', 'Send me a check', and 'Send funds to someone else'. A blue 'CONTINUE' button is located below the options. Step 3 is 'How will you send your documents to us?' and Step 4 is 'Confirm and submit'.

1 Tell us about your request

2 Where should we send your funds?

Choose one of the options below.

Link a bank account - it helps you get your funds faster!

Send me a check

Send funds to someone else

CONTINUE

3 How will you send your documents to us?

4 Confirm and submit

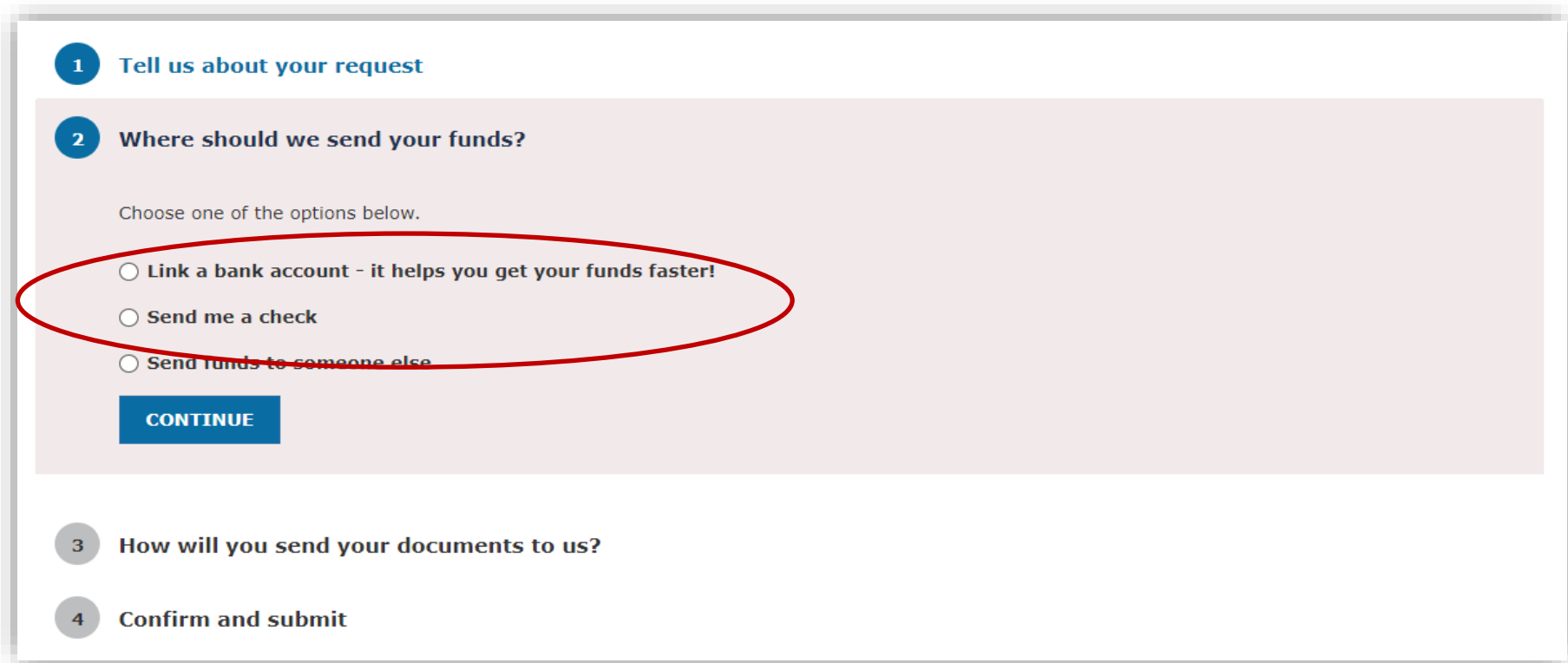


How to send payment to yourself

How do you want to get paid?

When it comes to paying yourself back, you can have funds reimbursed directly into your checking/savings account (also known as direct deposit), or you can have a check mailed to you.

- Select **Send me a check** to get a paper check in the mail.
- If you want funds deposited into your bank account, you need to first need to link a bank account. Click **Link a bank account** to set up your account for faster payments.
- When you've made your selection, click **Continue**.



The screenshot shows a multi-step form with the following elements:

- 1 Tell us about your request** (Step 1, active)
- 2 Where should we send your funds?** (Step 2, active)
- Choose one of the options below.
- Link a bank account - it helps you get your funds faster!** (This option is circled in red)
- Send me a check
- Send funds to someone else
- CONTINUE** button
- 3 How will you send your documents to us?** (Step 3, inactive)
- 4 Confirm and submit** (Step 4, inactive)

How will you send your documents to us?

You must always include supporting documentation when filing a claim. You have 2 options:

- You can choose to upload your documents, or you can
- Fax or mail your documents

If you want to upload, select ***I'll upload my documents.***

- Then, click **Select File to Upload** or drag and drop into the white box.
- Then click **Continue.**

Quick tip:

You can upload documents in JPG, PNG, GIF or PDF. The total size limit is 10MB.

The screenshot shows a multi-step form. Step 3, 'How will you send your documents to us?', is highlighted in a light pink background. It contains the following elements:

- Step indicators: 1 Tell us about your request, 2 Where should we send your funds?, 3 How will you send your documents to us? (active), 4 Confirm and submit.
- Text: 'You can upload, fax or mail your documents. The fastest way is to upload.'
- Radio button selection: I'll upload my documents (selected), I'll fax/mail my documents.
- Upload area: A light blue box titled 'Upload documents' with a help icon. Inside is a white box with the text 'Drag and drop your files here' and 'OR' above a blue button labeled 'SELECT FILE TO UPLOAD'.
- Continue button: A blue button labeled 'CONTINUE' is located below the radio buttons.

Select the drop-down arrow to review the claim certification statement. Then, check the box to sign your claim. Click **Submit**. When your claim submission is successful, you'll see a success message.

The image shows a multi-step form for claim submission. The steps are:

- 1 Tell us about your request
- 2 Where should we send your funds?
- 3 How will you send your documents to us?
- 4 Confirm and submit

Under step 4, the instructions are: "Read the claim certification statement and check the box to sign your claim." Below this is a note: "*Indicates a required field".

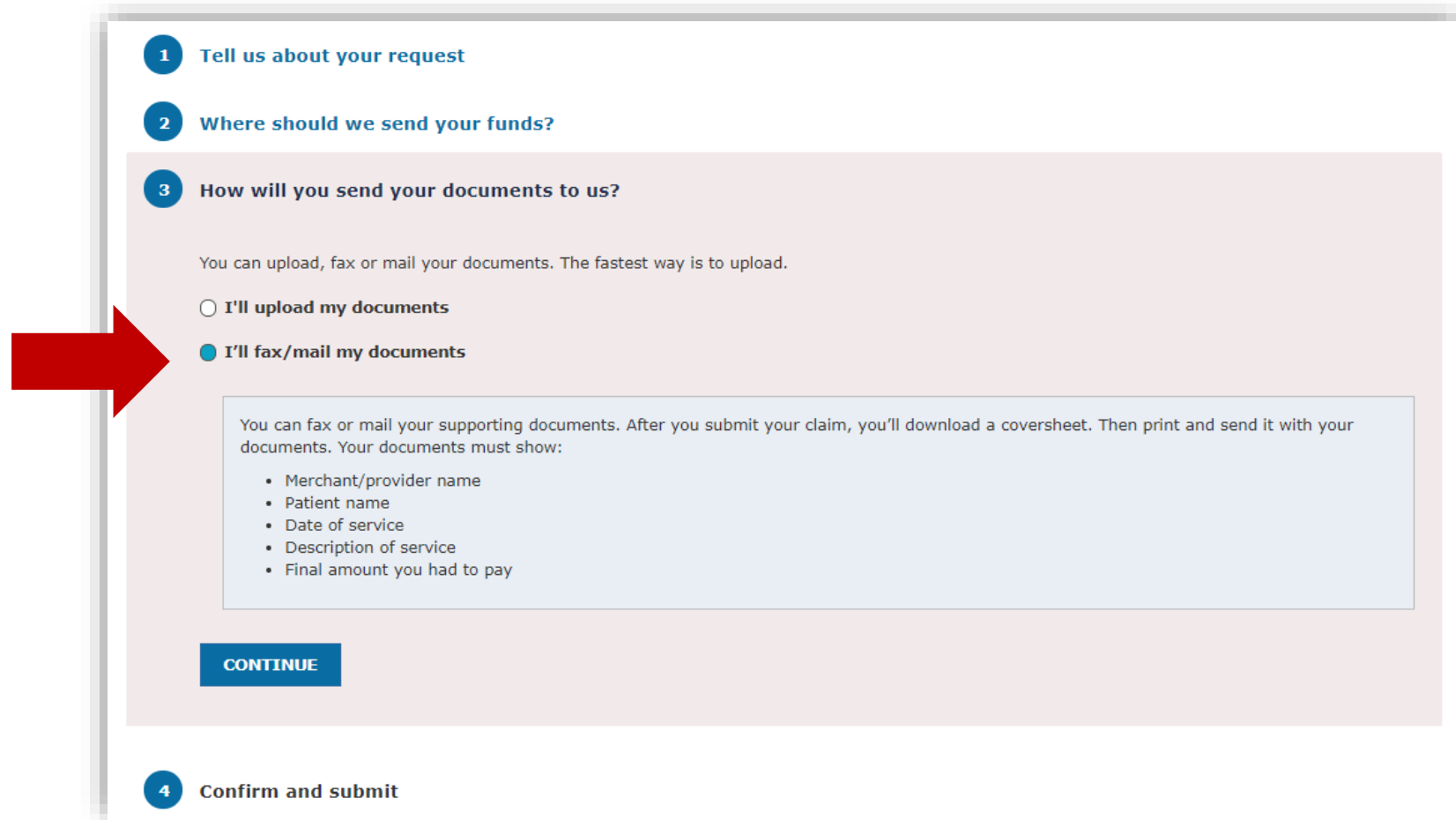
The form contains the following elements:

- A dropdown menu labeled "Claim certification statement" with a downward arrow icon, which is circled in red.
- A checkbox labeled "Your signature (Check this box to sign your claim)*", which is also circled in red.
- A blue "SUBMIT" button.

A red arrow points from the "SUBMIT" button to a success message box that appears below the form. The success message box contains:

- A checkmark icon.
- The text: "Success! We received your request. To view the status of your request, go to Claims."
- A blue button labeled "TAKE ME TO MY DASHBOARD".

If you don't want to upload your documents, select **I'll fax/mail my documents** on this page. Then click **Continue**. Keep in mind, after you submit your claim, you'll download a coversheet to print/send.



The screenshot shows a multi-step form. Step 1 is 'Tell us about your request', Step 2 is 'Where should we send your funds?', and Step 3 is 'How will you send your documents to us?'. Step 4 is 'Confirm and submit'. In Step 3, there are two radio button options: 'I'll upload my documents' and 'I'll fax/mail my documents'. A large red arrow points to the 'I'll fax/mail my documents' option. Below the options, there is a text box explaining that users can fax or mail documents and that a coversheet will be provided. The coversheet must include: Merchant/provider name, Patient name, Date of service, Description of service, and Final amount you had to pay. A blue 'CONTINUE' button is located at the bottom of the form.

1 Tell us about your request

2 Where should we send your funds?

3 How will you send your documents to us?

You can upload, fax or mail your documents. The fastest way is to upload.

I'll upload my documents

I'll fax/mail my documents

You can fax or mail your supporting documents. After you submit your claim, you'll download a coversheet. Then print and send it with your documents. Your documents must show:

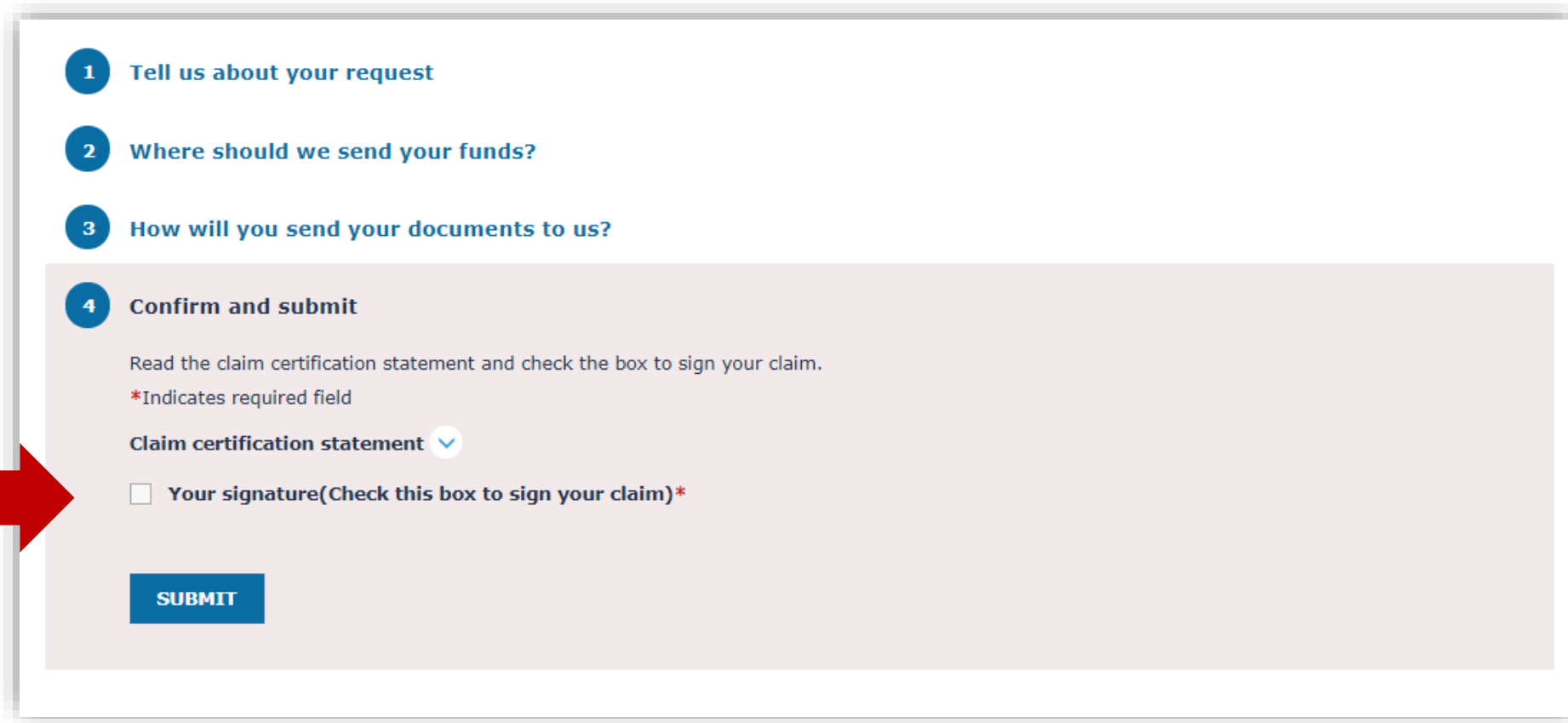
- Merchant/provider name
- Patient name
- Date of service
- Description of service
- Final amount you had to pay

CONTINUE

4 Confirm and submit

Confirm and submit your claim

- Select the drop-down arrow to review the claim certification statement.
- Then, check the box to sign your claim.
- Click **Submit**.



The screenshot shows a multi-step form with four numbered steps:

- 1 Tell us about your request
- 2 Where should we send your funds?
- 3 How will you send your documents to us?
- 4 Confirm and submit

Step 4 is highlighted with a light pink background. Below the step number, the text reads: "Read the claim certification statement and check the box to sign your claim." Below this is a legend: "*Indicates required field".

The form contains the following elements:

- A dropdown menu labeled "Claim certification statement" with a downward arrow.
- A checkbox followed by the text "Your signature(Check this box to sign your claim)*". A large red arrow points to this checkbox.
- A blue button labeled "SUBMIT".

Download your coversheet

Once your claim is successfully submitted, you need to download/print a coversheet. Click **Download Coversheet**. Then, fax or mail the coversheet, along with your supporting documents.


Here is your TexFlex information

Fax to: (402) 231-4310

Mail to: PO BOX 8396, Omaha, NE 68103-8396



Success! We received your request. But we need your supporting documents.

1. Download and print your coversheet.
2. Fax or mail your coversheet and supporting documents. 
3. To view the status of your request, go to Claims.

[TAKE ME TO MY DASHBOARD](#)

[DOWNLOAD COVERSHEET](#)



How to send payment to your provider

After you log into www.TexFlexERS.com, you'll see your account dashboard.

- Scroll to the TexFlex account you wish to submit a claim for.
- Click **File a claim** under *Account Actions*.

The screenshot displays the PAYFLEX website interface. At the top, there is a navigation bar with links for Home, Help & Support, Account Settings, and Logout. Below this, a teal header shows 'Hello, JASON' and the 'TEXFLEX' logo. The main content area is divided into two sections: 'Dependent Care' and 'Healthcare (FSA)'. Each section includes a balance bar chart, a table of transactions (Annual election, Deposits, Spent Funds), and 'Last day to spend funds' and 'Last day to file claims' dates. In both sections, the 'File a claim' link under 'Account Actions' is circled in red. A 'Quick Tips' box is present in each section, and an 'Urgent action needed' alert is visible in the Healthcare (FSA) section.

Dependent Care
9/1/2020 - 8/31/2021 [Change Plan Year](#)
Employees Retirement System of Texas

\$2,815⁰¹ available funds [?](#)

\$2,815.01 available funds

Annual election ?	\$5,000.00
Deposits ?	\$2,625.00
Spent Funds ?	(\$190.01)

Last day to spend funds [?](#) November 15, 2021
Last day to file claims [?](#) December 31, 2021

Account Actions
[View account details >](#)
[File a claim >](#)
[Link a bank account >](#)
[Set up account notifications >](#)

Quick Tips
Explore eligible expenses. Find out what you can pay for with your PayFlex account.

Healthcare (FSA)
9/1/2020 - 8/31/2021 [Change Plan Year](#)
Employees Retirement System of Texas

\$2,525⁰¹ available funds [?](#)

\$2,525.01 available funds | \$174.99 spent funds

Annual election ?	\$2,500.00
Remaining carryover amount ?	\$25.01
Spent Funds ?	\$174.99

Last day to spend funds [?](#) August 31, 2021
Last day to file claims [?](#) December 31, 2021

Account Actions
[View account details >](#)
[File a claim >](#)
[Link a bank account >](#)
[Set up account notifications >](#)

Quick Tips
Explore eligible expenses. Find out what you can pay for with your PayFlex account.
Your employer allows you to carry over all your unused funds into the next plan year. [?](#)

Urgent action needed [!](#)

Tell us about your request

- After you click **file a claim**, select your expense type.
- Enter the amount and date of your expense.
- Click **Continue**.

Then, you'll have a chance to edit, or remove your expense, or add another expense. When you are all set, you can click **Continue**.

Request funds – File a claim

1 Tell us about your request

*Indicates a required field

Expense type*

Medical

Amount* Enter dollar amount

Date of expense* MM/DD/YYYY

CONTINUE

2 Where should we send your funds?

3 How will you send your documents to us?

4 Confir

Request funds – File a claim

1 Tell us about your request

Expense type	Amount	Expense date	Name	Edit	Remove
Medical	\$50.00	12/18/2019 - 12/18/2019			

ADD ANOTHER EXPENSE CONTINUE

2 Where should we send your funds?

3 How will you send your documents to us?

4 Confirm and submit

Where should we send your funds?

- Choose where to send your funds.
- To pay a provider, select **Send funds to someone else**.
- Then choose your recipient or click the (+) icon to add a new one.
- Click **Continue**.

The screenshot shows a multi-step form. Step 1 is 'Tell us about your request'. Step 2, 'Where should we send your funds?', is highlighted in a light pink background. It contains a radio button for 'Send funds to my bank account' and a checked radio button for 'Send funds to someone else'. Below the checked option is a dropdown menu for 'Recipient name' with the text 'Select a recipient' and a blue plus icon for 'Add a new recipient'. A red circle highlights this dropdown and the plus icon. A blue 'CONTINUE' button is at the bottom of the step. Steps 3 and 4 are visible at the bottom but are not active.

After you select or add your recipient, you need to add payment information.

- This includes your contact phone number, statement date, account/invoice number and the name of the person who received the care/service.
- You can also add comments for your provider to help ensure they apply the payment correctly.
- When finished, select **ADD**.

1 Tell us about your request

2 Where should we send your funds?

Choose one of the options below.

Send funds to my bank account

Send funds to someone else

Select a recipient or add a new one.

Recipient name

Dr. Davis ▼ [+ Add a new recipient](#)

Dr. Davis Edit

123 MAIN STREET
HARTFORD, CT 06111

Additional payment information

Complete the fields below. We'll include this information with the payment to your provider.

*Indicates required field

Your contact number* ?

123-456-7890

Statement date

MM/DD/YYYY 📅

Account/Invoice number

Enter account or invoice number
100 characters max

Who received the care/services?*

Enter a name
100 character limit

Comments

Enter any comments or notes about your payment
250 character limit

ADD

Review the recipient's information.

- If everything looks good, click **Continue**.
- You can also click **Edit** to make changes.
- When you're all set, click **Continue**.

The screenshot shows a multi-step form. Step 1 is 'Tell us about your request'. Step 2 is 'Where should we send your funds?'. Under step 2, there are two radio button options: 'Send funds to my bank account' (unselected) and 'Send funds to someone else' (selected). Below the selected option, it says 'Select a recipient or add a new one.' There is a dropdown menu for 'Recipient name' with 'Dr. Davis' selected. To the right of the dropdown is a blue button with a plus sign and the text 'Add a new recipient'. Below the dropdown is a light blue box containing the recipient's address: 'Dr. Davis', '123 MAIN STREET', 'HARTFORD, CT 06111', and an 'Edit' link. Below that is another light blue box for 'Additional payment information' with an 'Edit' link. The information in this box includes: 'Contact Number: 123-456-7890', 'Statement Date:', 'Account/Invoice number:', 'Who is the care/service for: George', and 'Comments:'. At the bottom of the form area is a blue button labeled 'CONTINUE'. Below the form area are steps 3 and 4: 'How will you send your documents to us?' and 'Confirm and submit'.

1 Tell us about your request

2 Where should we send your funds?

Choose one of the options below.

Send funds to my bank account

Send funds to someone else

Select a recipient or add a new one.

Recipient name

Dr. Davis

+ Add a new recipient

Dr. Davis Edit

123 MAIN STREET

HARTFORD, CT 06111

Additional payment information Edit

Contact Number: 123-456-7890

Statement Date:

Account/Invoice number:

Who is the care/service for: George

Comments:

CONTINUE

3 How will you send your documents to us?

4 Confirm and submit

How will you send your documents to us?

You must always include supporting documentation when filing a claim. You have 2 options:

- You can choose to upload your documents, or you can
- Fax or mail your documents

If you want to upload, select **I'll upload my documents**.

- Then, click **Select File to Upload** or drag and drop into the white box.
- Then click **Continue**.

Quick tip:

You can upload documents in JPG, PNG, GIF or PDF. The total size limit is 10MB.

The screenshot shows a multi-step form. Step 1 is 'Tell us about your request', step 2 is 'Where should we send your funds?', and step 3 is 'How will you send your documents to us?'. Step 3 is highlighted in a light pink background. Below the step number, there is a sub-header 'How will you send your documents to us?' and a note: 'You can upload, fax or mail your documents. The fastest way is to upload.' There are two radio button options: 'I'll upload my documents' (which is selected) and 'I'll fax/mail my documents'. The 'I'll upload my documents' option leads to a light blue box titled 'Upload documents' with a help icon. Inside this box is a white area with the text 'Drag and drop your files here' and 'OR' above a blue button labeled 'SELECT FILE TO UPLOAD'. Below the upload box, the 'I'll fax/mail my documents' option is visible with a blue 'CONTINUE' button. At the bottom of the form, step 4 'Confirm and submit' is partially visible.

Select the drop-down arrow to review the claim certification statement. Then, check the box to sign your claim. Click **Submit**. When your claim submission is successful, you'll see a success message.

The image shows a multi-step form for claim submission. The steps are:

- 1 Tell us about your request
- 2 Where should we send your funds?
- 3 How will you send your documents to us?
- 4 Confirm and submit

Under step 4, the instructions are: "Read the claim certification statement and check the box to sign your claim." A red asterisk indicates a required field. The form contains the following elements:

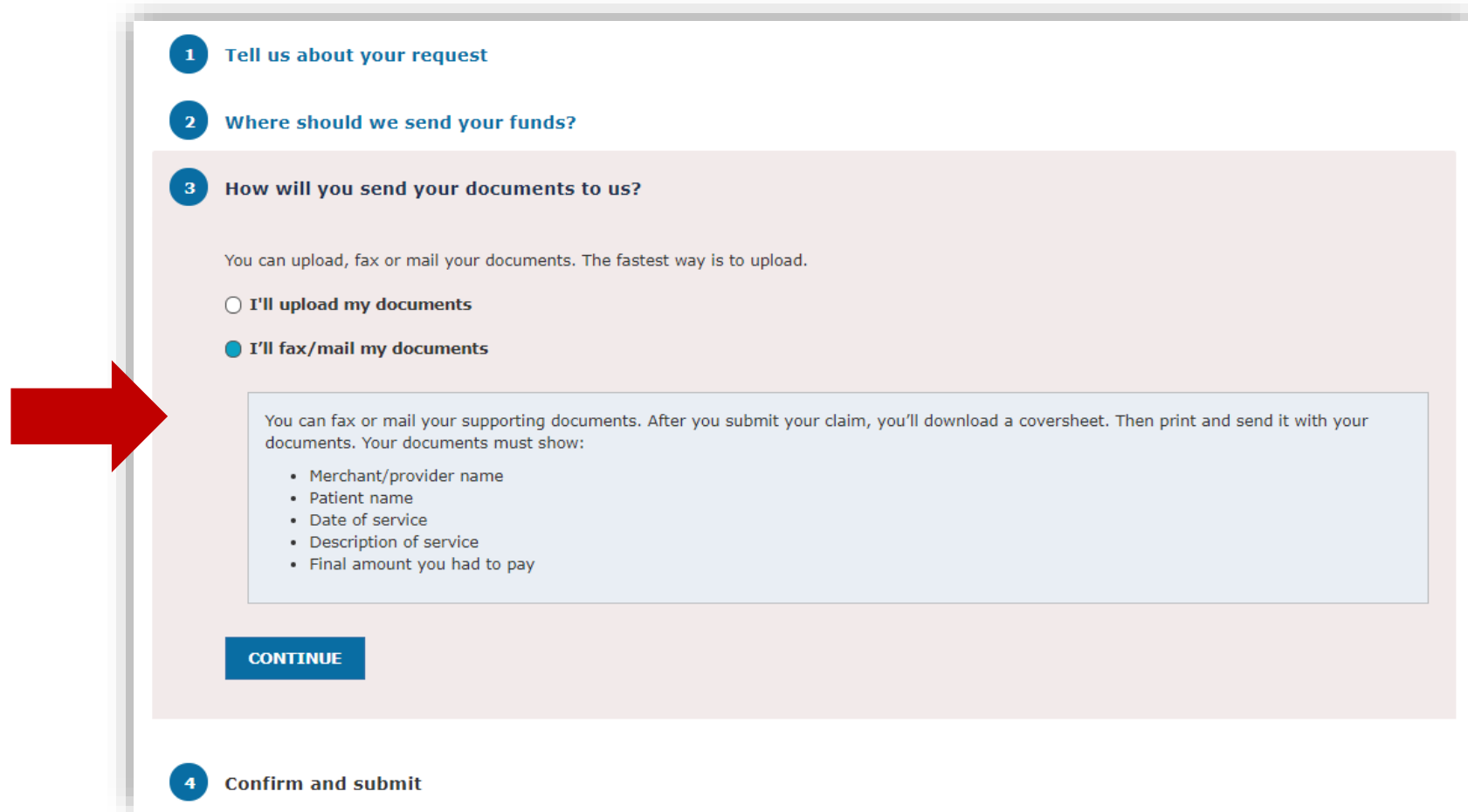
- A drop-down menu labeled "Claim certification statement" with a downward arrow icon, circled in red.
- An unchecked checkbox labeled "Your signature (Check this box to sign your claim)*", also circled in red.
- A blue "SUBMIT" button.

A red arrow points from the "SUBMIT" button to a success message box that appears below the form:

✓ Success! We received your request. To view the status of your request, go to Claims.

[TAKE ME TO MY DASHBOARD](#)

If you don't want to upload your documents, select **I'll fax/mail my documents**. Then click **Continue**. Keep in mind, after you submit your claim, you'll download a coversheet to print/send.



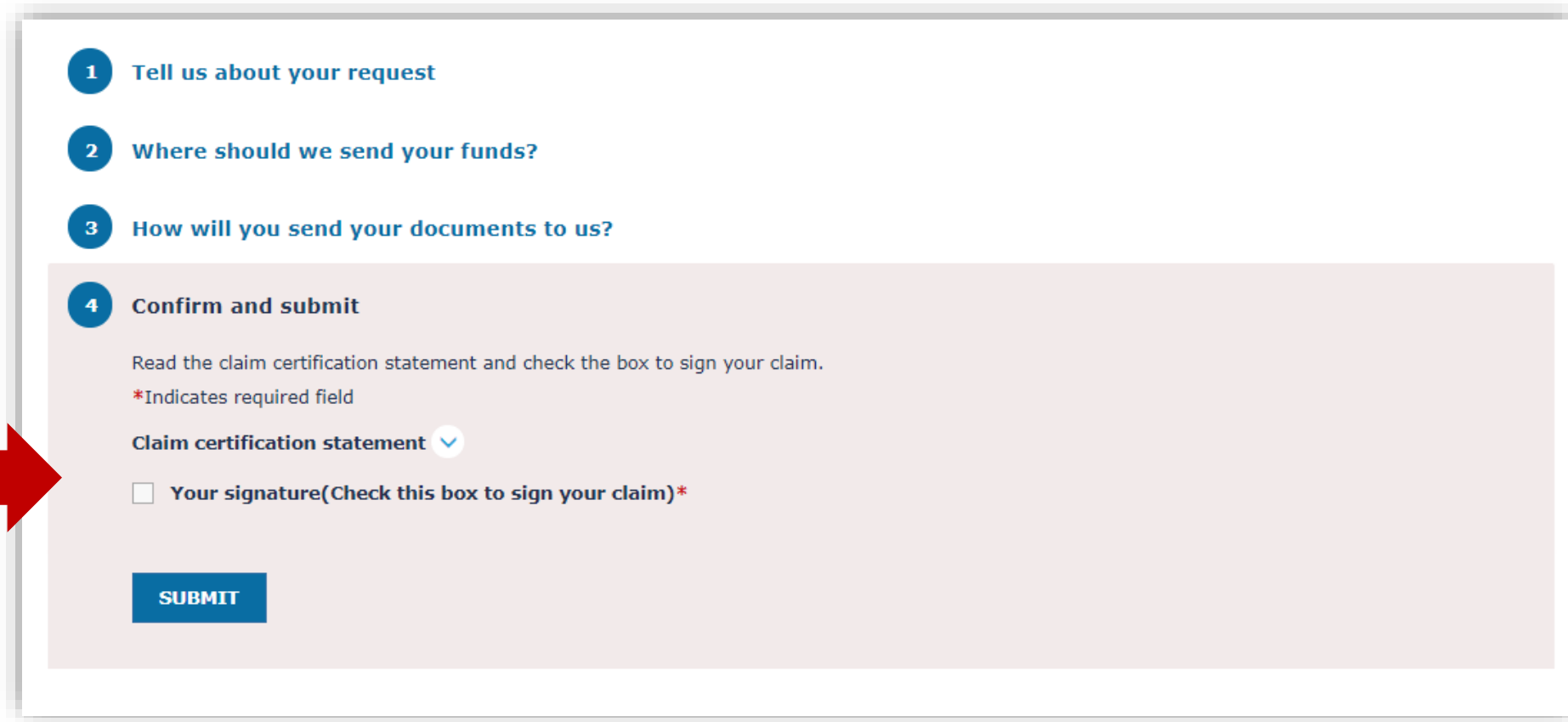
The screenshot shows a multi-step form with four steps:

- 1 Tell us about your request
- 2 Where should we send your funds?
- 3 How will you send your documents to us?
You can upload, fax or mail your documents. The fastest way is to upload.
 I'll upload my documents
 I'll fax/mail my documents
You can fax or mail your supporting documents. After you submit your claim, you'll download a coversheet. Then print and send it with your documents. Your documents must show:
 - Merchant/provider name
 - Patient name
 - Date of service
 - Description of service
 - Final amount you had to pay
- 4 Confirm and submit

A large red arrow points to the 'I'll fax/mail my documents' radio button.

Confirm and submit your claim


- Select the drop-down arrow to review the claim certification statement.
- Then, check the box to sign your claim.
- Click **Submit**.



The screenshot shows a multi-step form with four numbered steps:

- 1 Tell us about your request
- 2 Where should we send your funds?
- 3 How will you send your documents to us?
- 4 Confirm and submit

Step 4 is highlighted with a light pink background. It contains the following text and elements:

- Read the claim certification statement and check the box to sign your claim.
- *Indicates required field
- Claim certification statement 
- Your signature(Check this box to sign your claim)*
- SUBMIT** button

A large red arrow points from the left side of the page towards the checkbox in step 4.

Download your coversheet

Once your claim is successfully submitted, you need to download/print a coversheet. Click **Download Coversheet**. Then, fax or mail the coversheet, along with your supporting documents.


Here is your TexFlex information

Fax to: (402) 231-4310

Mail to: PO BOX 8396, Omaha, NE 68103-8396



Success! We received your request. But we need your supporting documents.

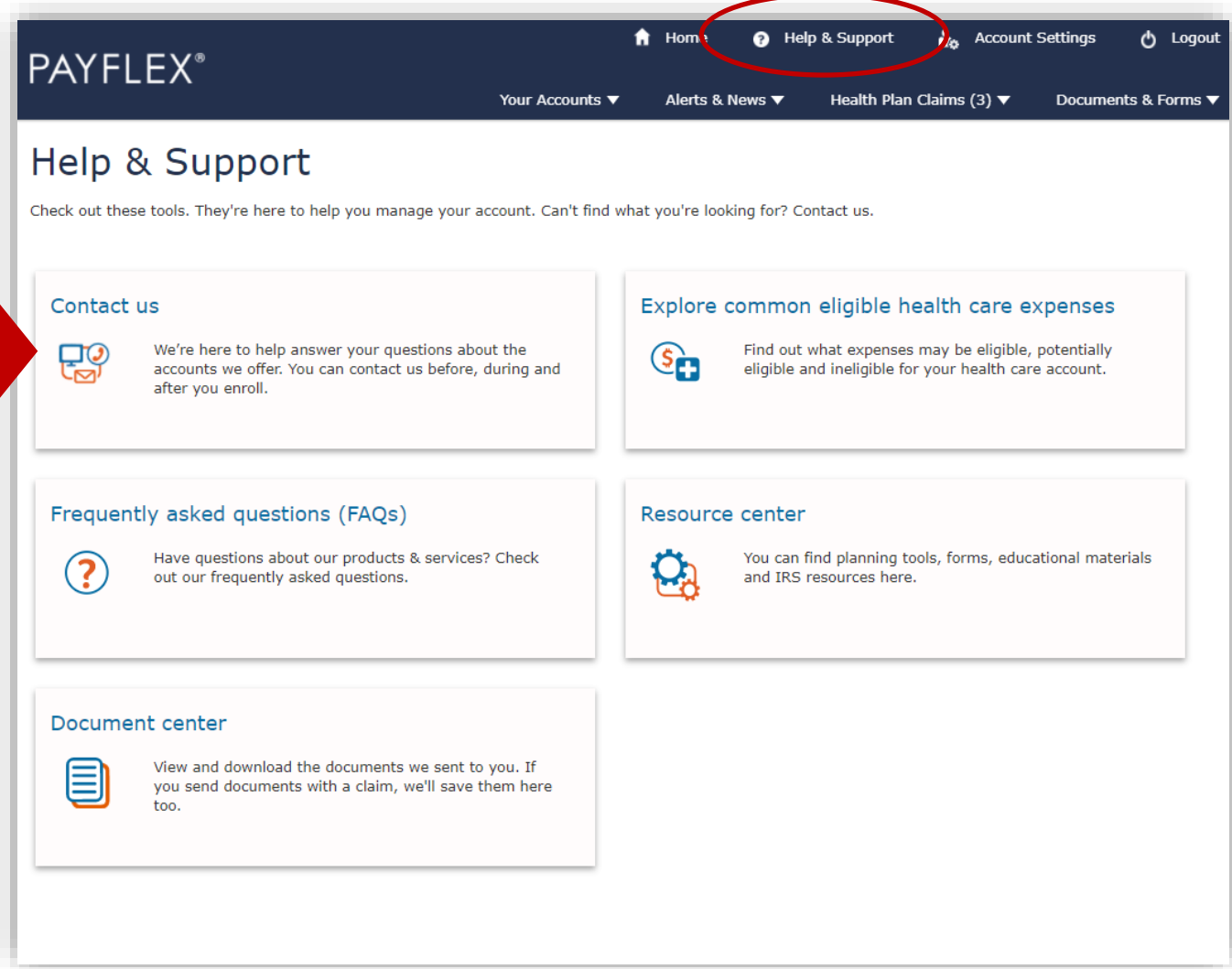
1. Download and print your coversheet.
2. Fax or mail your coversheet and supporting documents. 
3. To view the status of your request, go to Claims.

[TAKE ME TO MY DASHBOARD](#)

[DOWNLOAD COVERSHEET](#)

We're here to help!

For any questions, log into www.TexFlexERS.com. Select **Help & Support**. Then select **Contact us** to call, email or chat with a TexFlex customer care representative.



This material is for informational purposes only and is not an offer of coverage. It contains only a partial, general description of plan benefits or programs and does not constitute a contract. It does not contain legal or tax advice. You should contact your legal counsel if you have any questions. Information is believed to be accurate as of the production date; however, it is subject to change. PayFlex cannot and shall not provide any payment or service in violation of any United States (US) economic or trade sanctions.

6P.03.314.1-TX (7/21)