TexFlex online claim submission guide

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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:

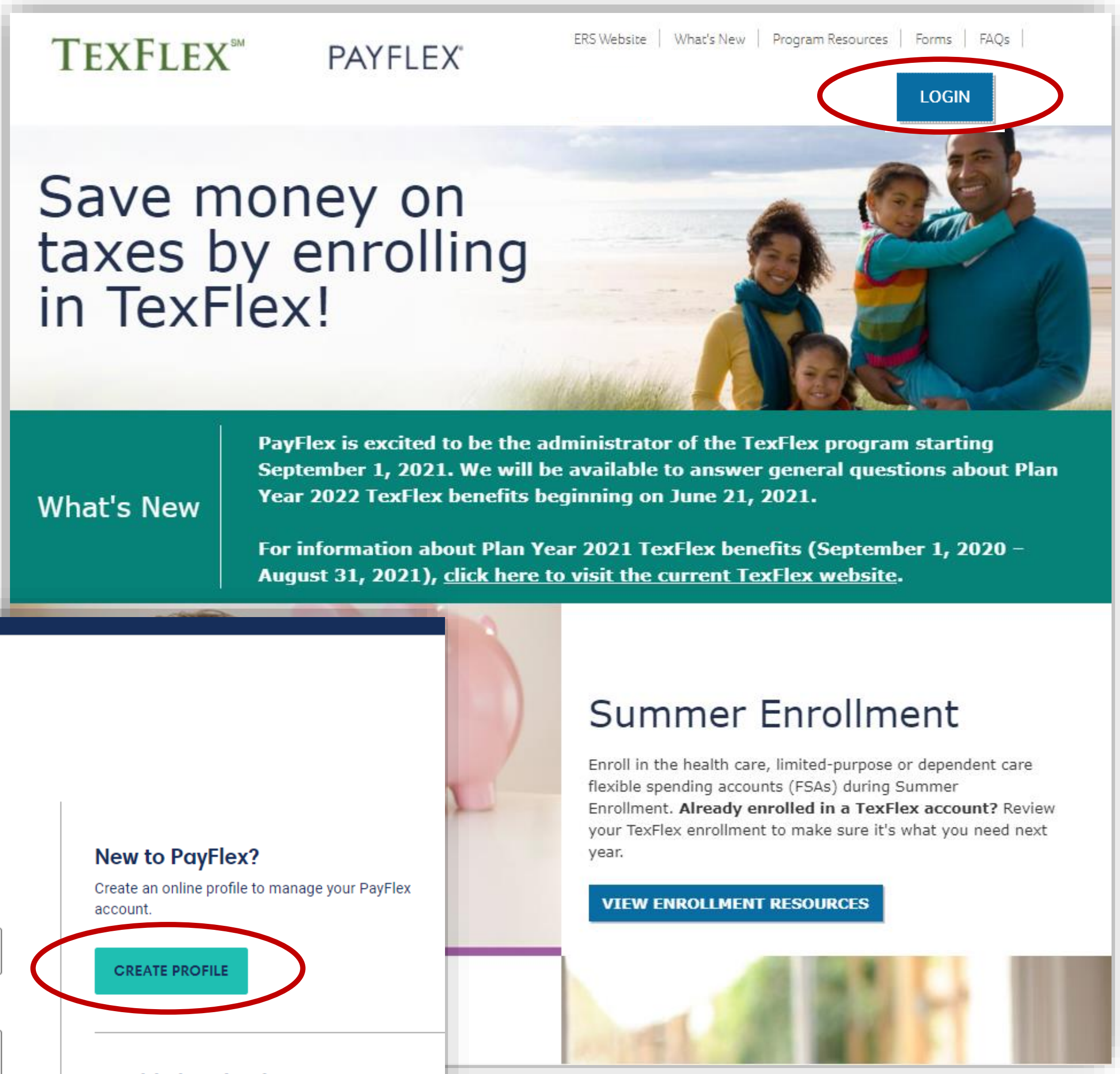
- How to file a claim by sending payment to yourself
- How to file a claim by sending payment to a provider

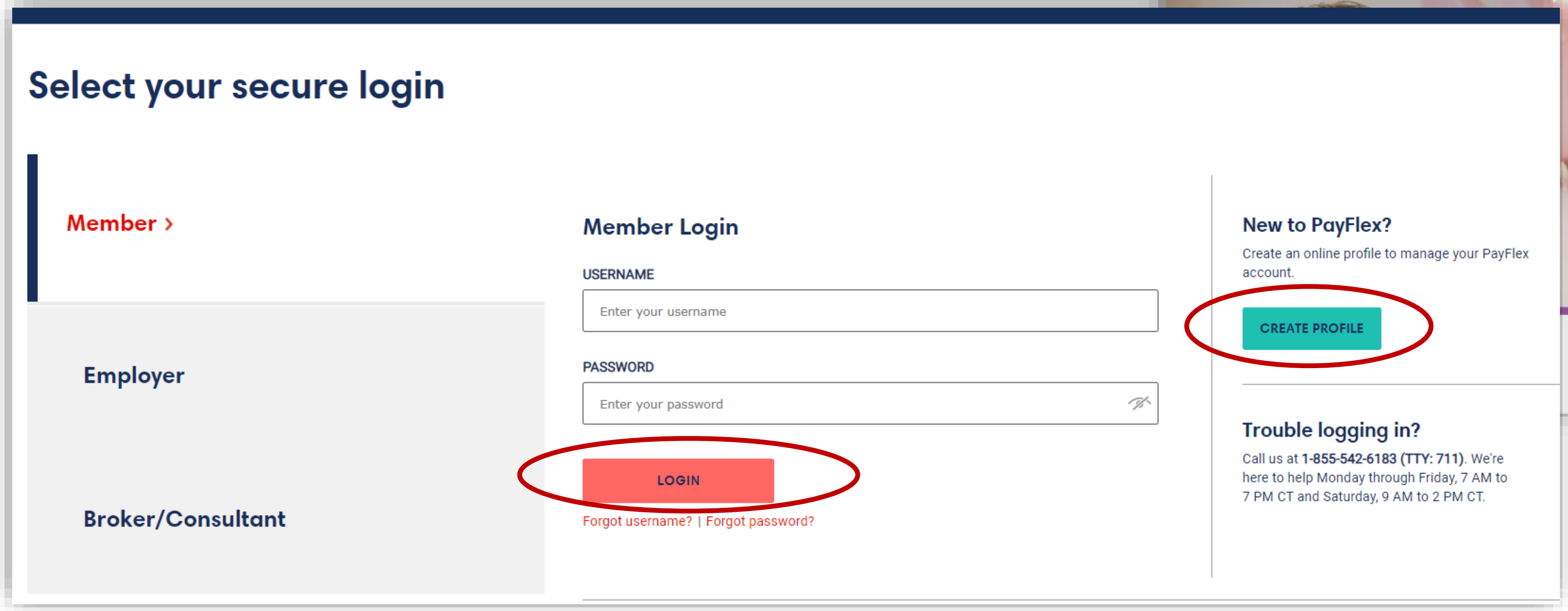
Keep in mind, your claim **must include** supporting documentation. The preferred type of supporting document for a health care or limited-purpose claim is an explanation of benefits (EOB) from your medical, dental or vision coverage carrier. For dependent care, or if you don't have an EOB, you can send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

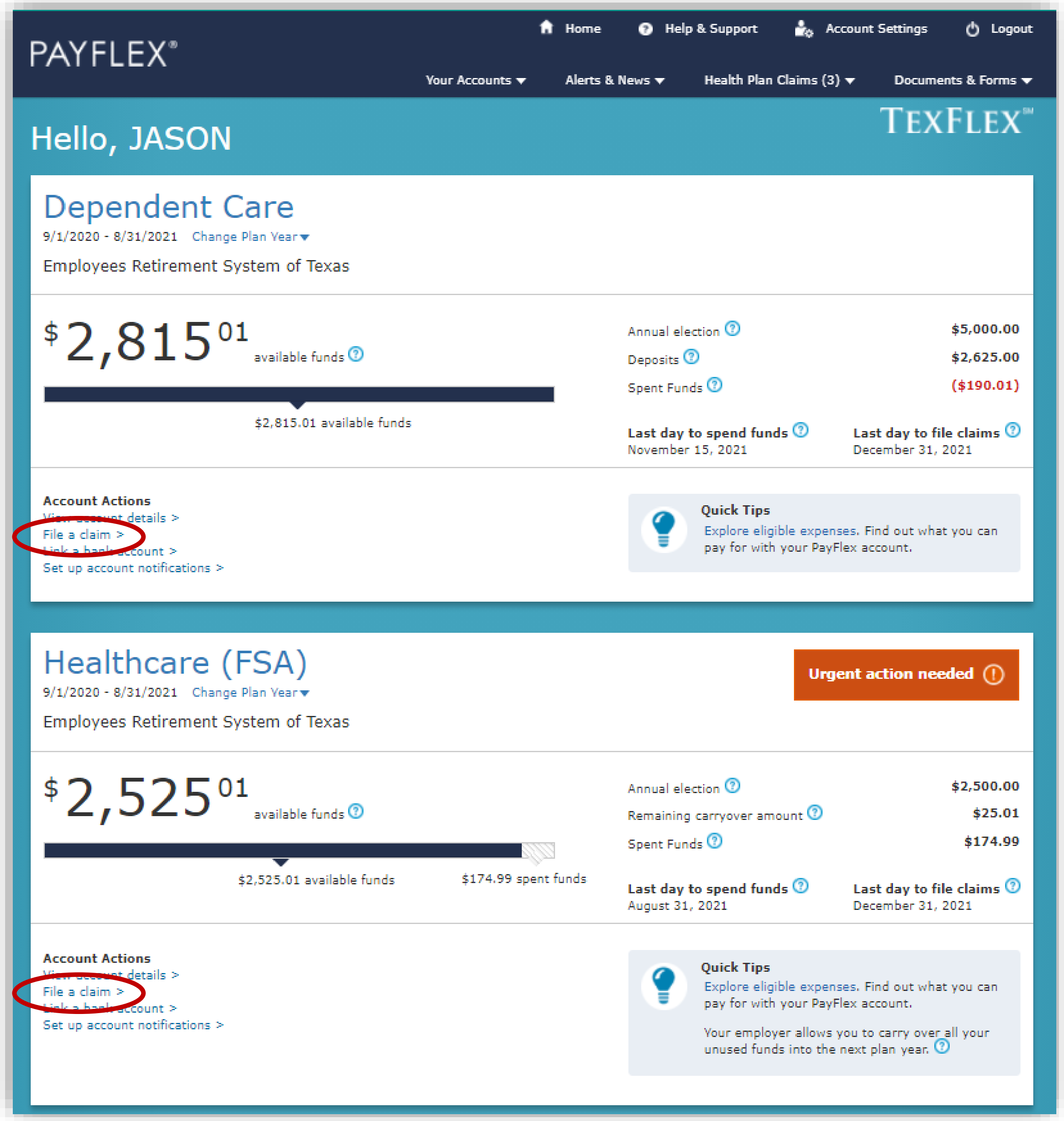
1. Visit **www.TexFlexERS.com**.
2. Click **LOGIN** at the top of your screen.
3. Enter your username and password, then select **LOGIN**.
4. If this is your first-time logging in, select **CREATE PROFILE** to register your account.





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*.

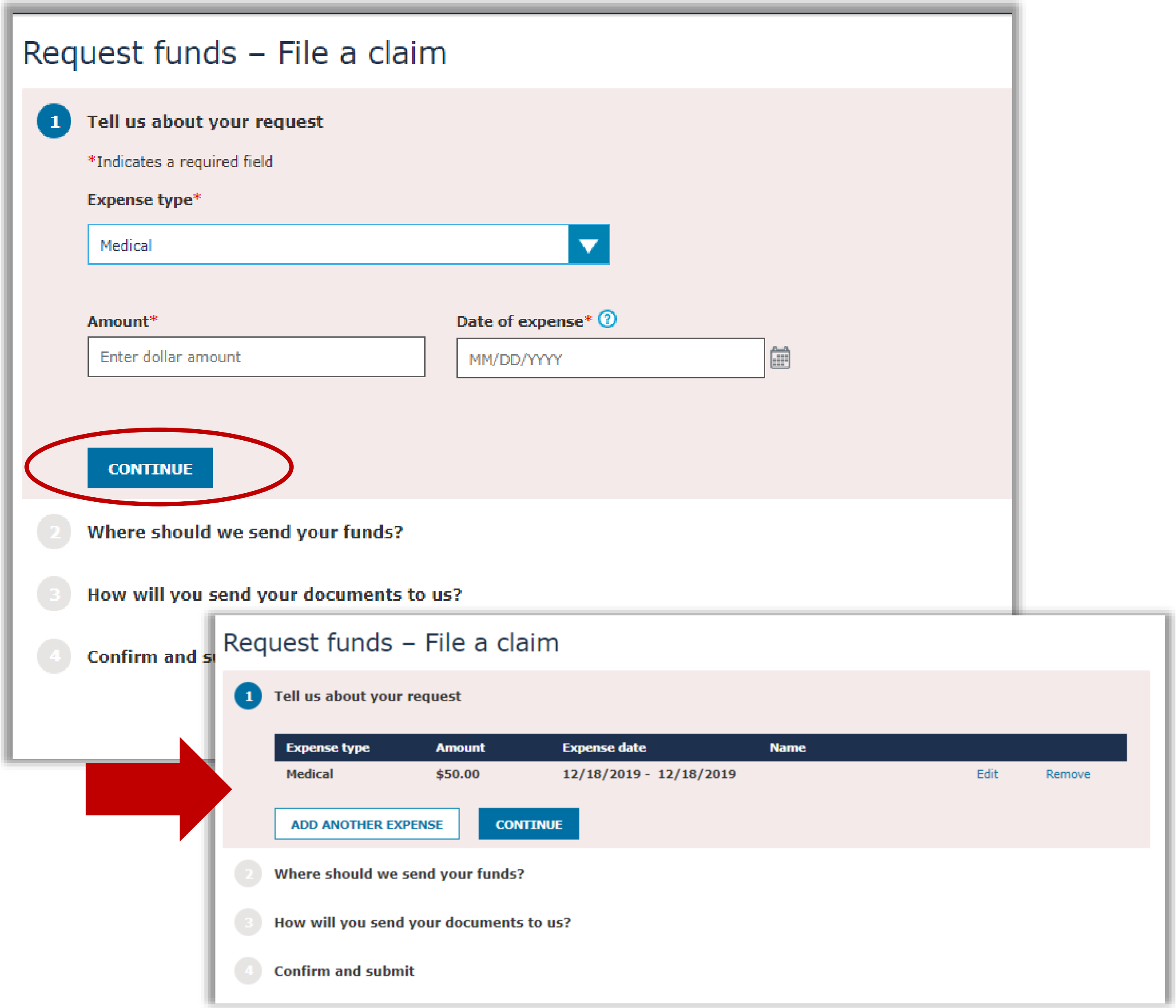


Tell us about your request

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.**



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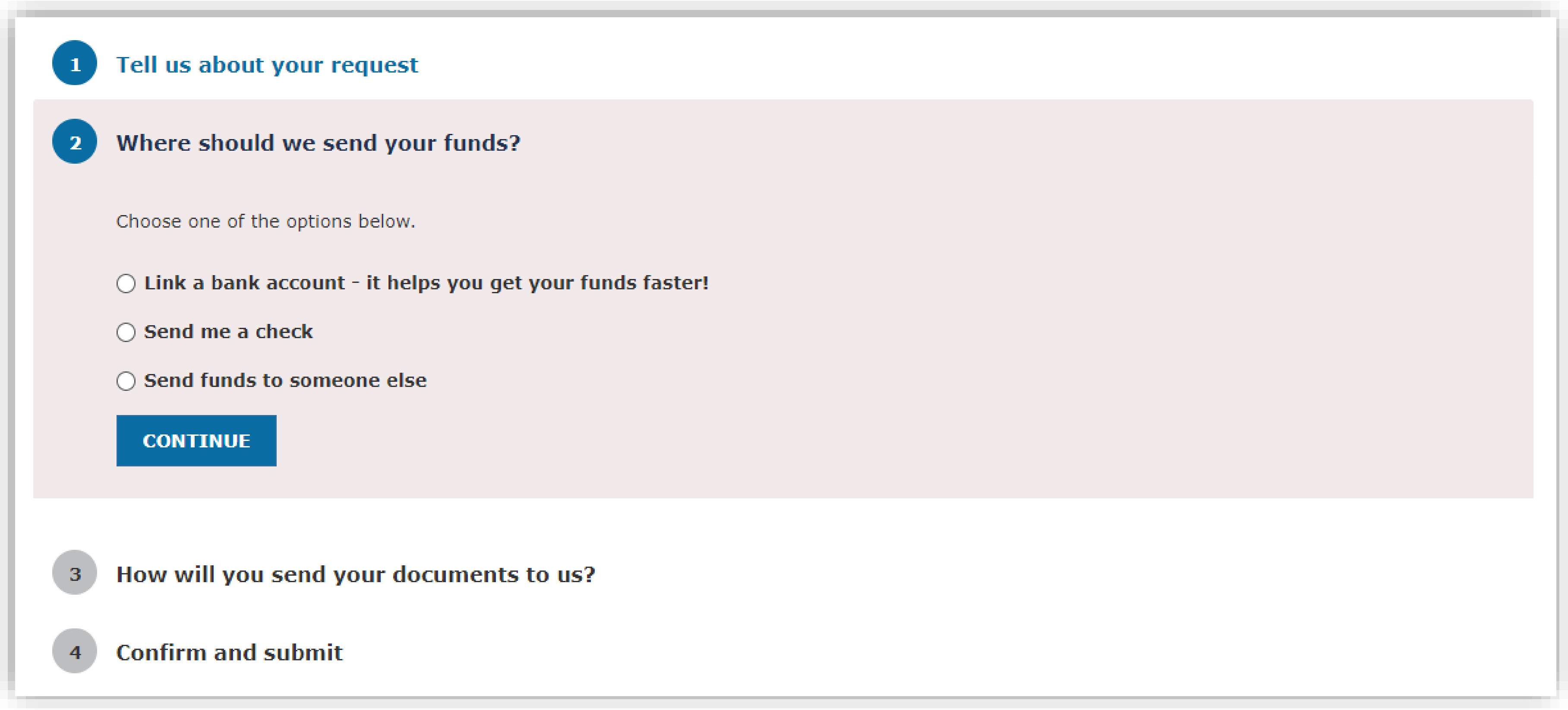
Where should we send your funds?

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

- Pay yourself back be 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)



How to send payment to yourself

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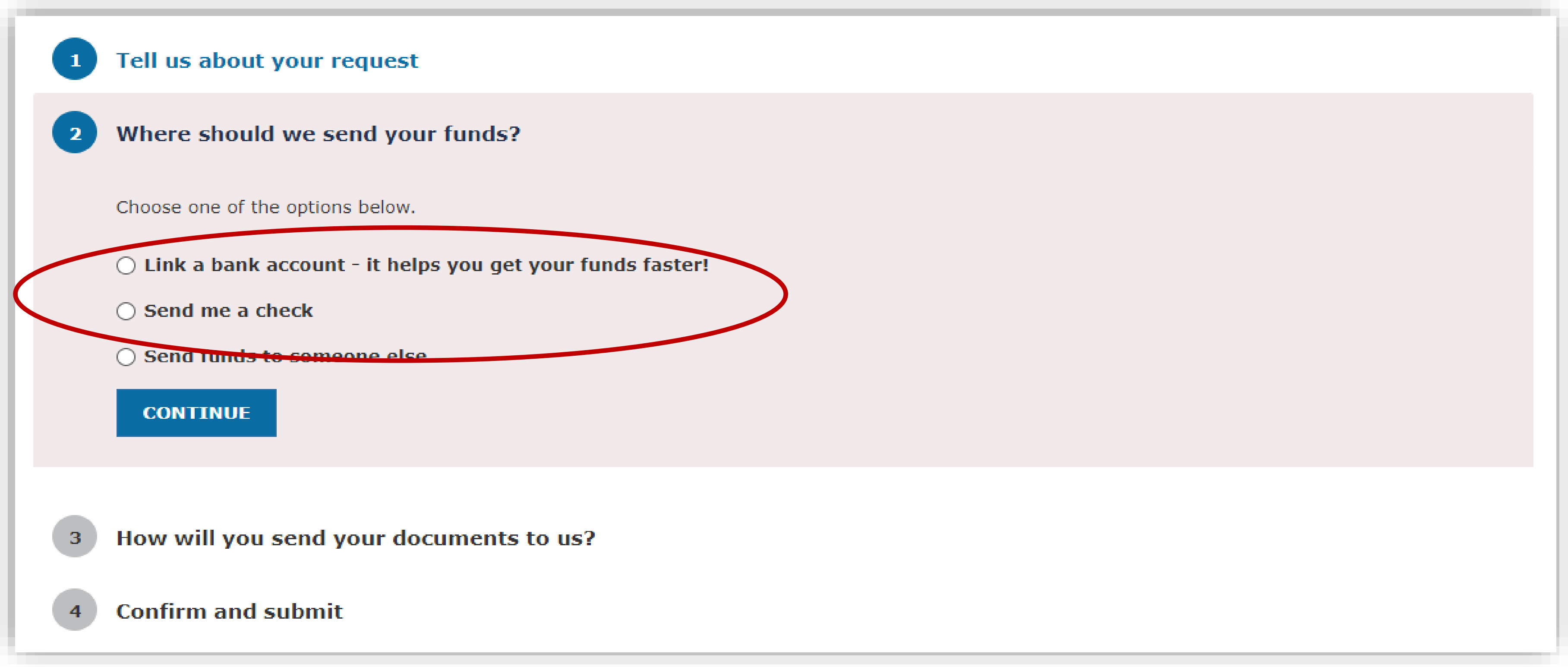
How do you want to get paid?

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**.



How will you send your documents to us?

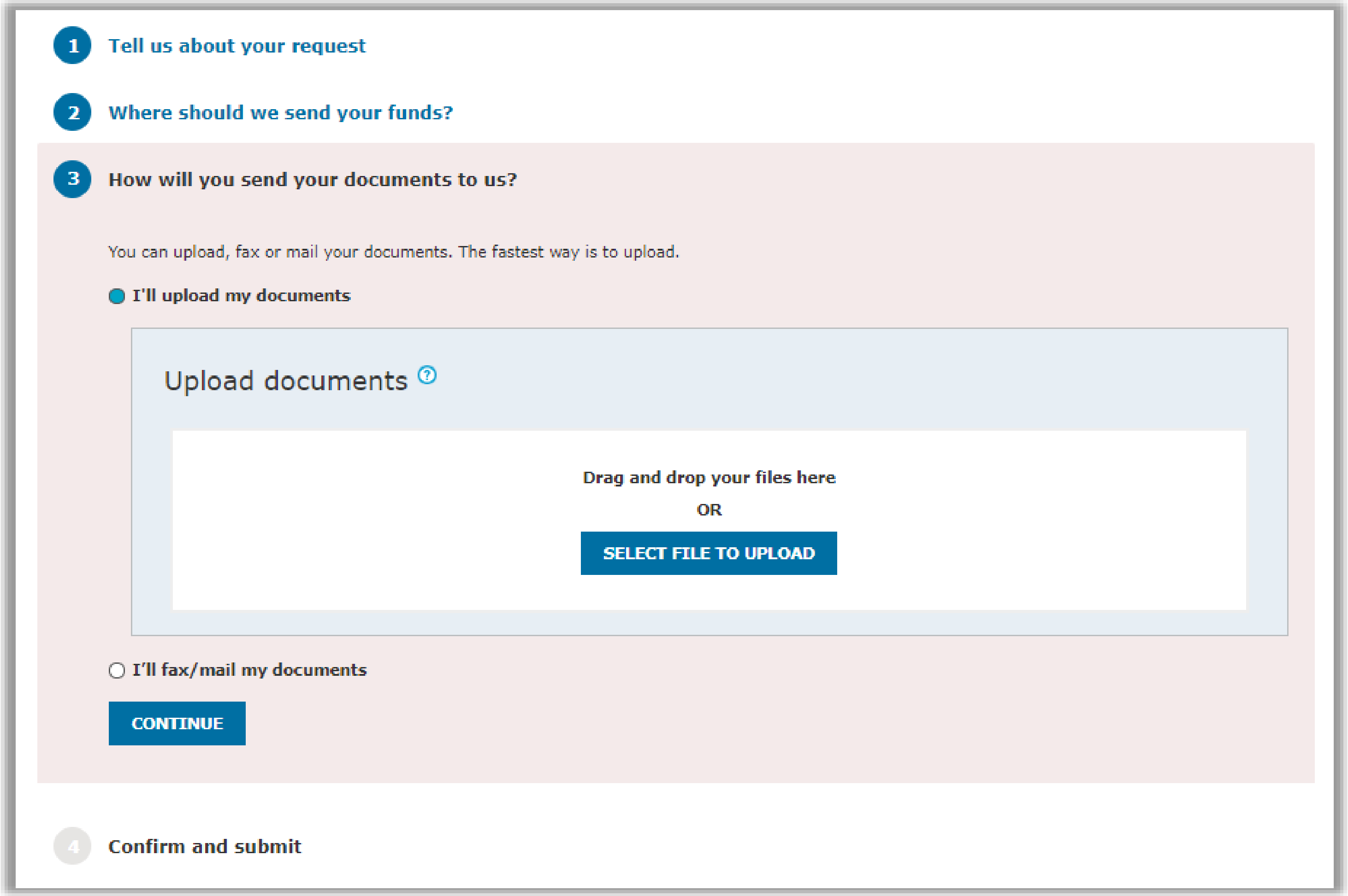
You must always include supporting documentation when filing a claim. You have 2 options:

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

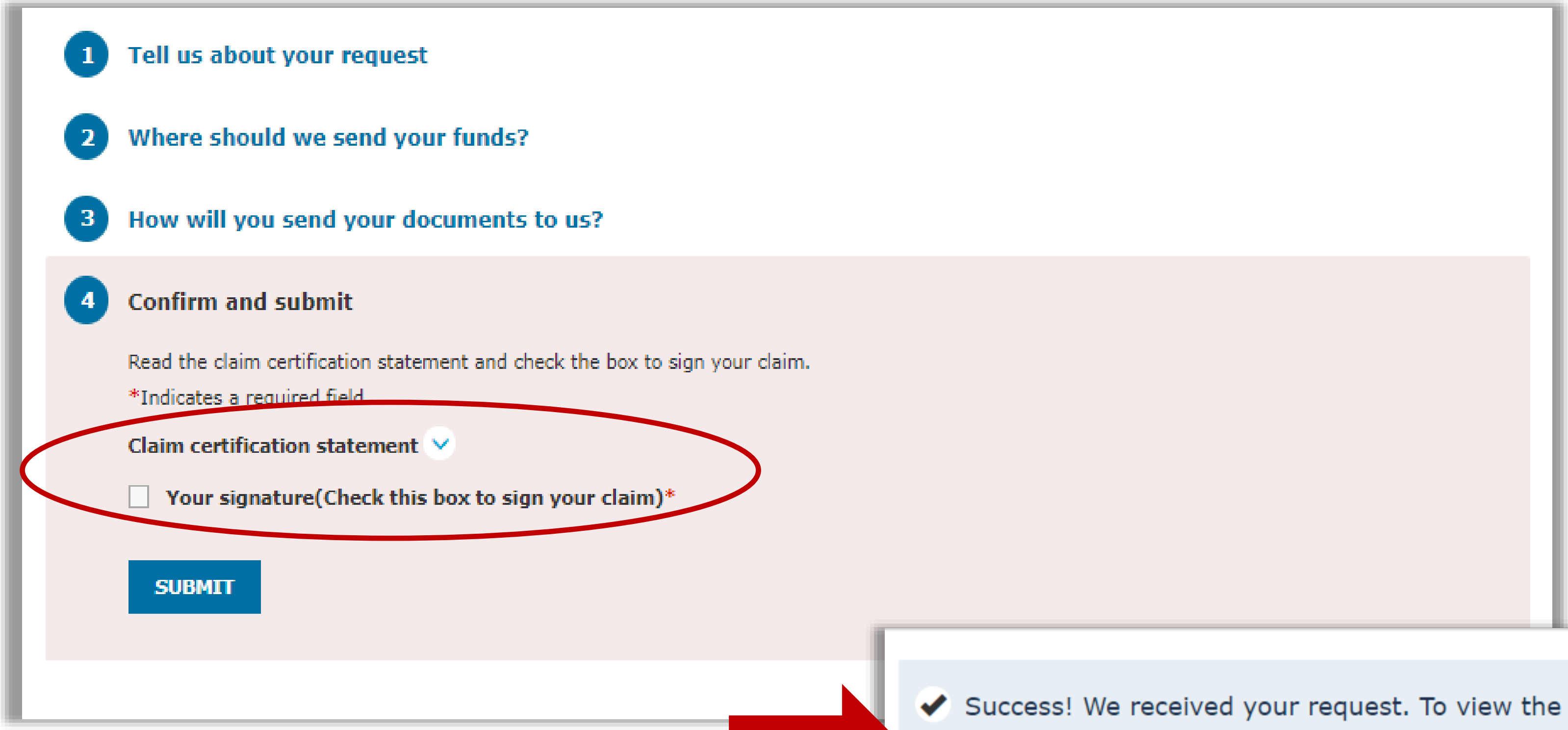
If you want to upload, select ***I'll upload my documents*.**

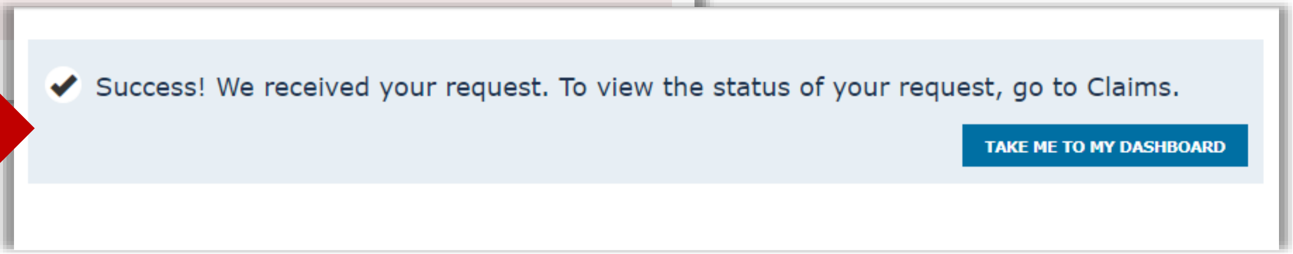
- Then, click **Select File to Upload** or drag and drop into the white box.
- Then click **Continue.**

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

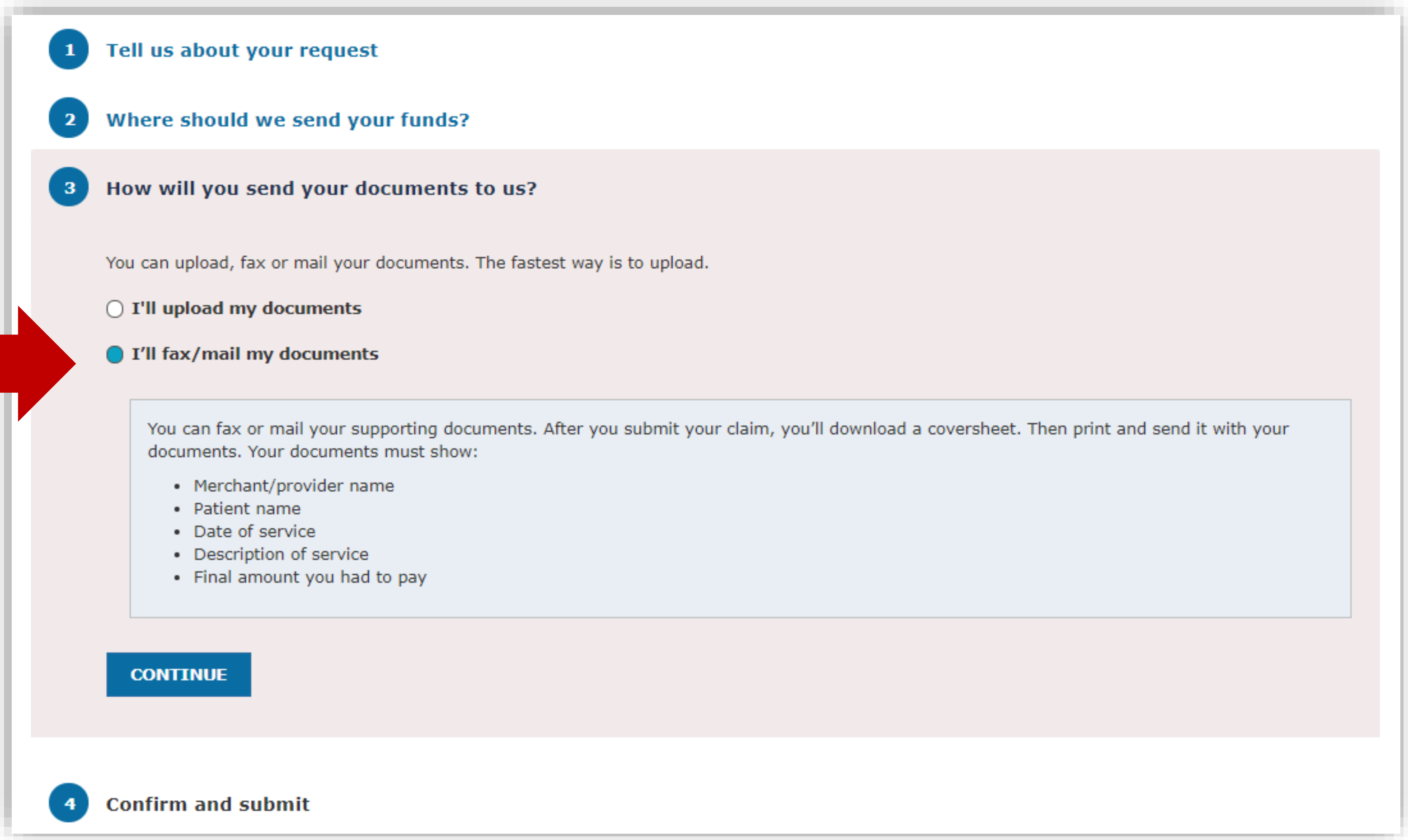


Select the drop-down arrow to review the claim certification statement. Then, check the box to sign your claim. Click **Submit**. When your claim submission is successful, you’ll see a success message.





If you don’t want to upload you 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.



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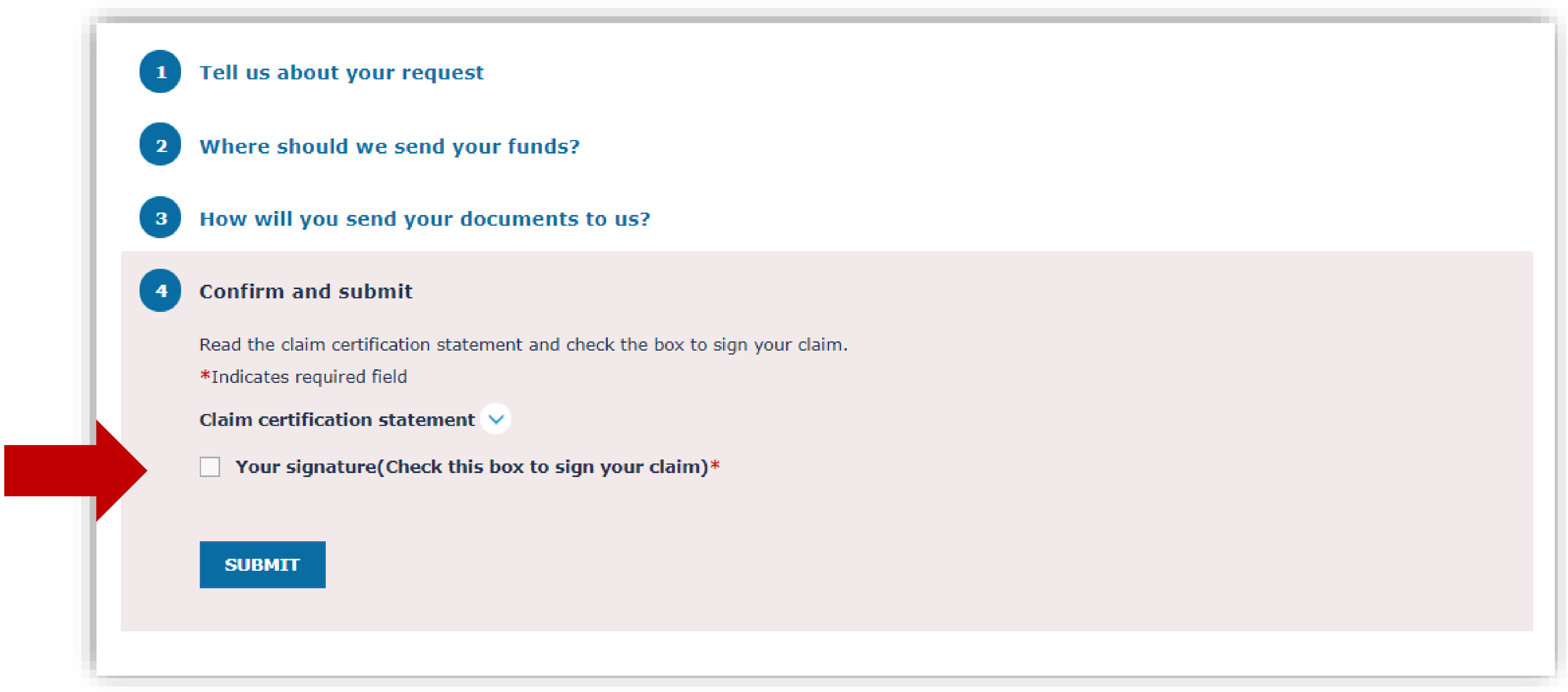
Confirm and submit your claim

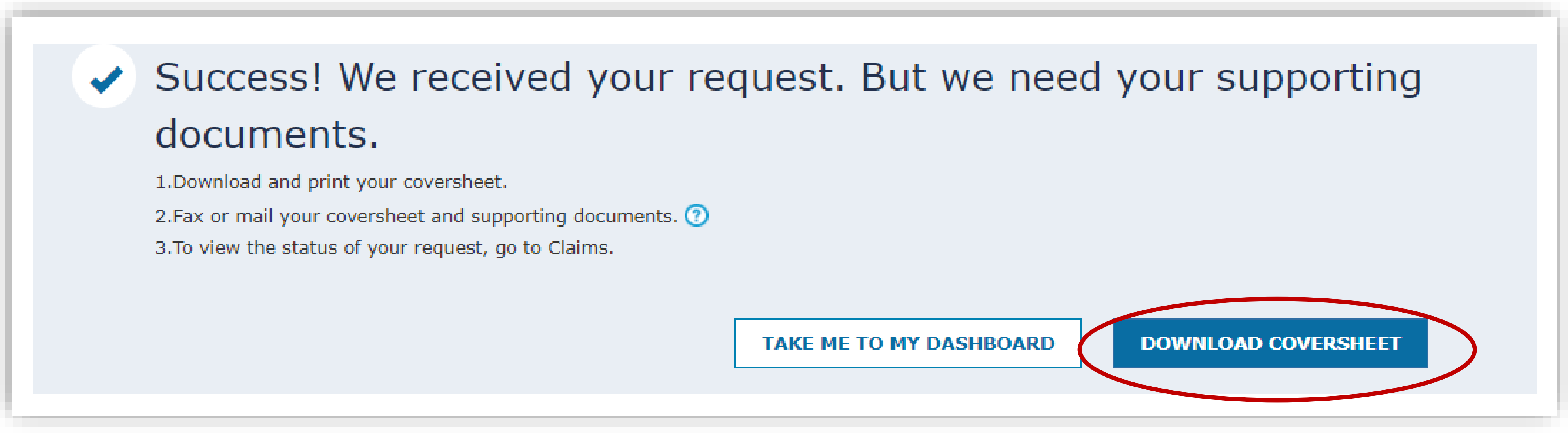
- Select the drop-down arrow to review the claim certification statement.
- Then, check the box to sign your claim.
- Click **Submit**.



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



How to send payment to your provider

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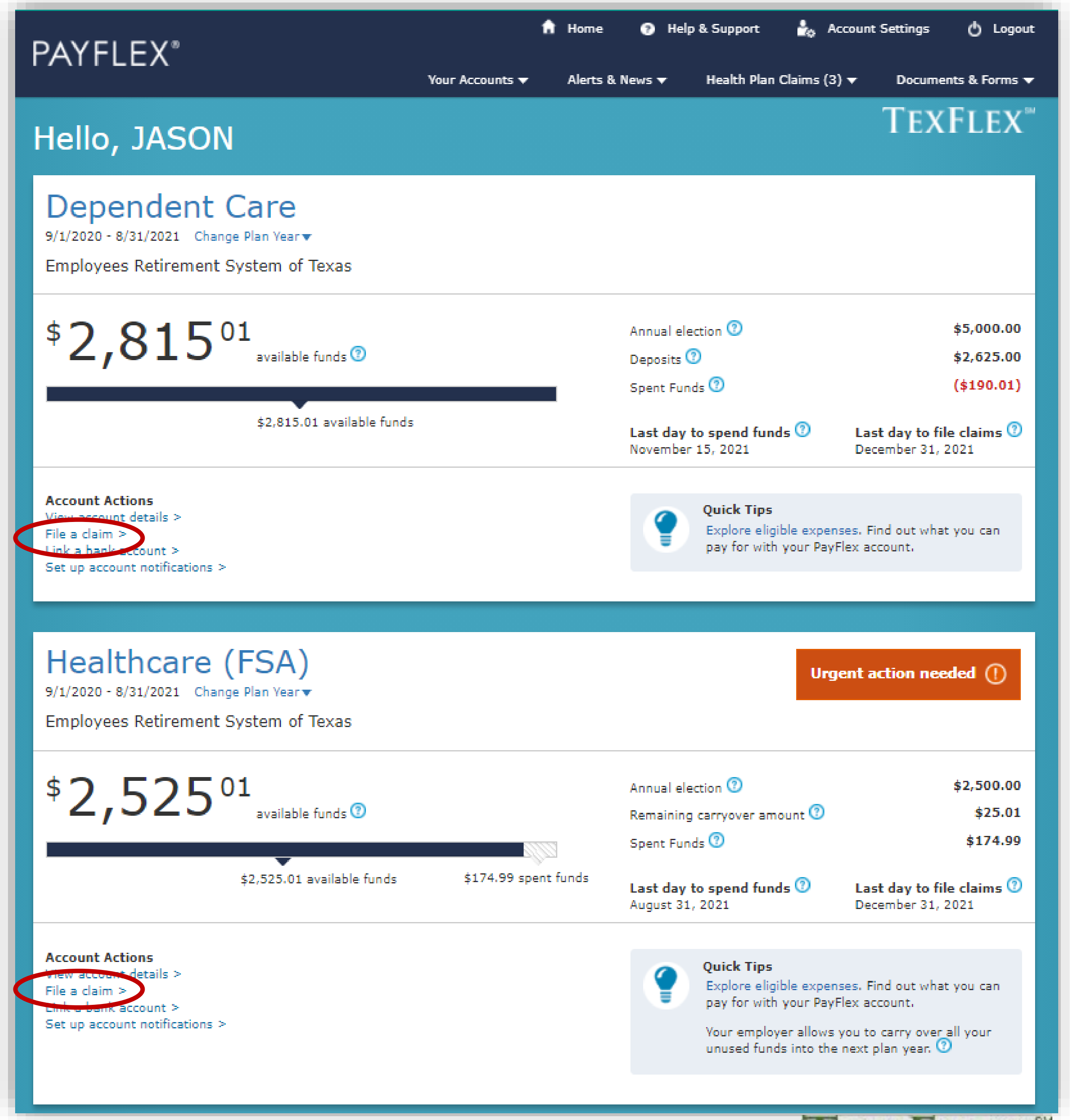

Tell us about your request

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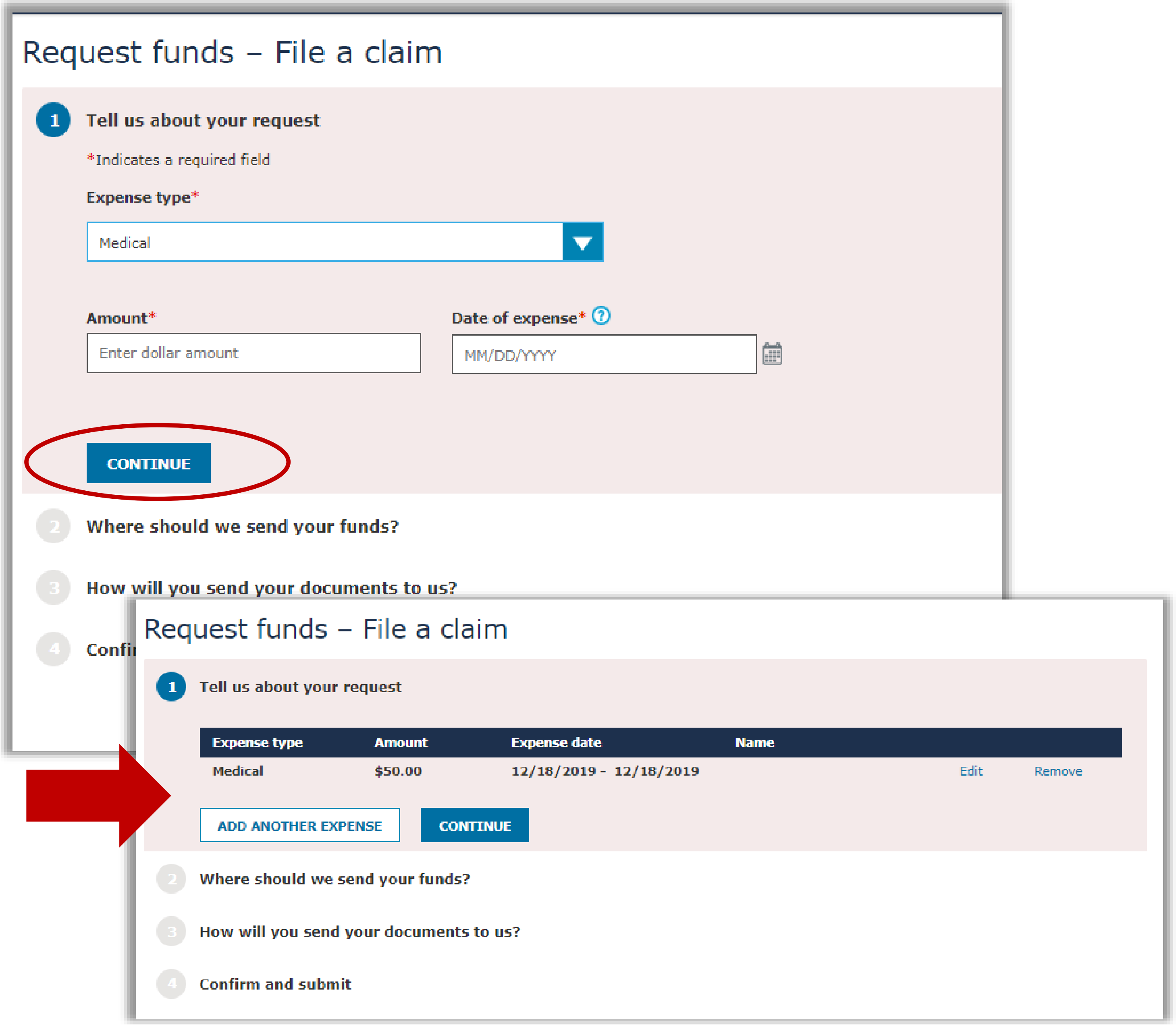

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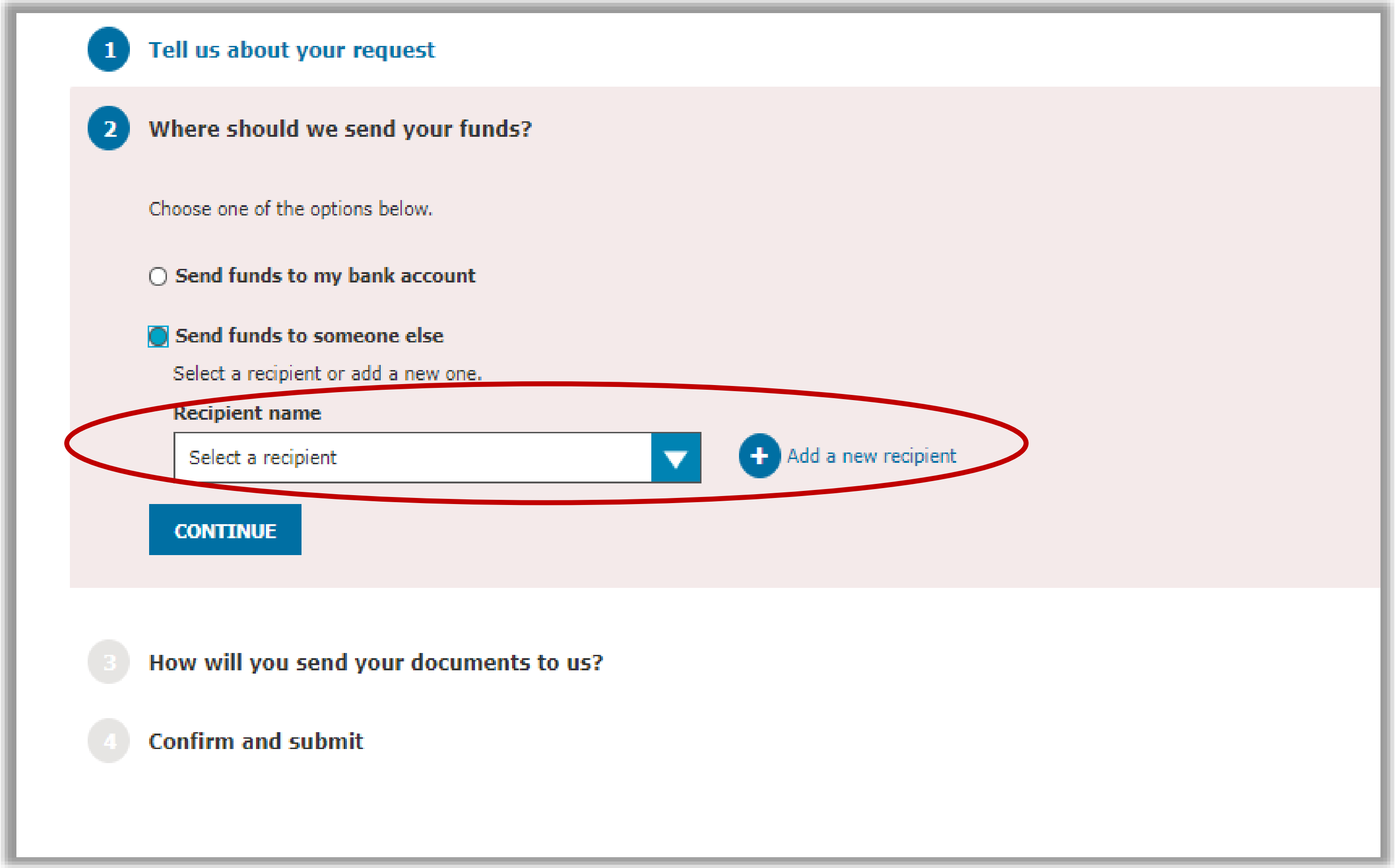
Where should we send your funds?

- 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**.



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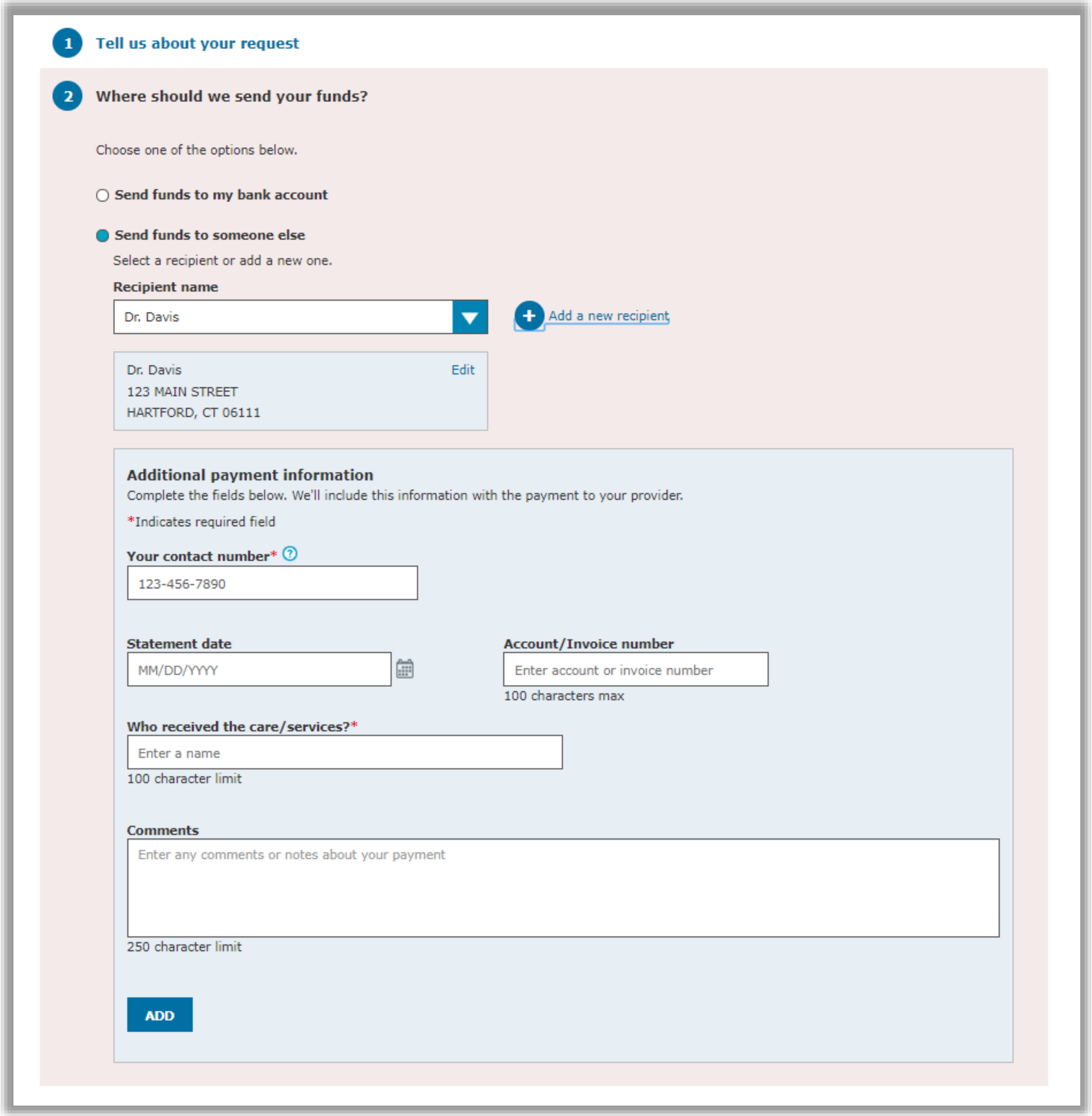
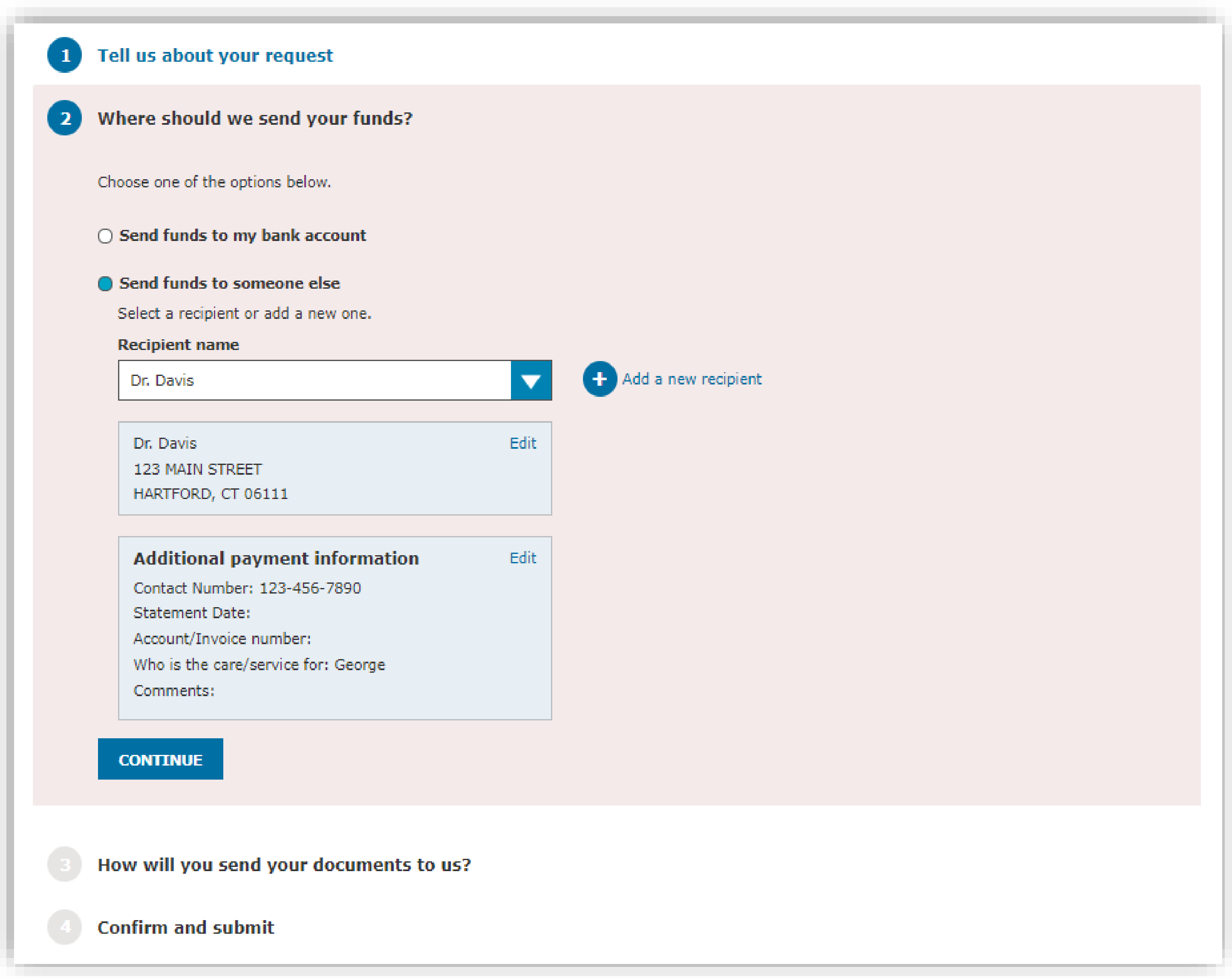
After you select or add your recipient, you need to add payment information.

- 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**.



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**.



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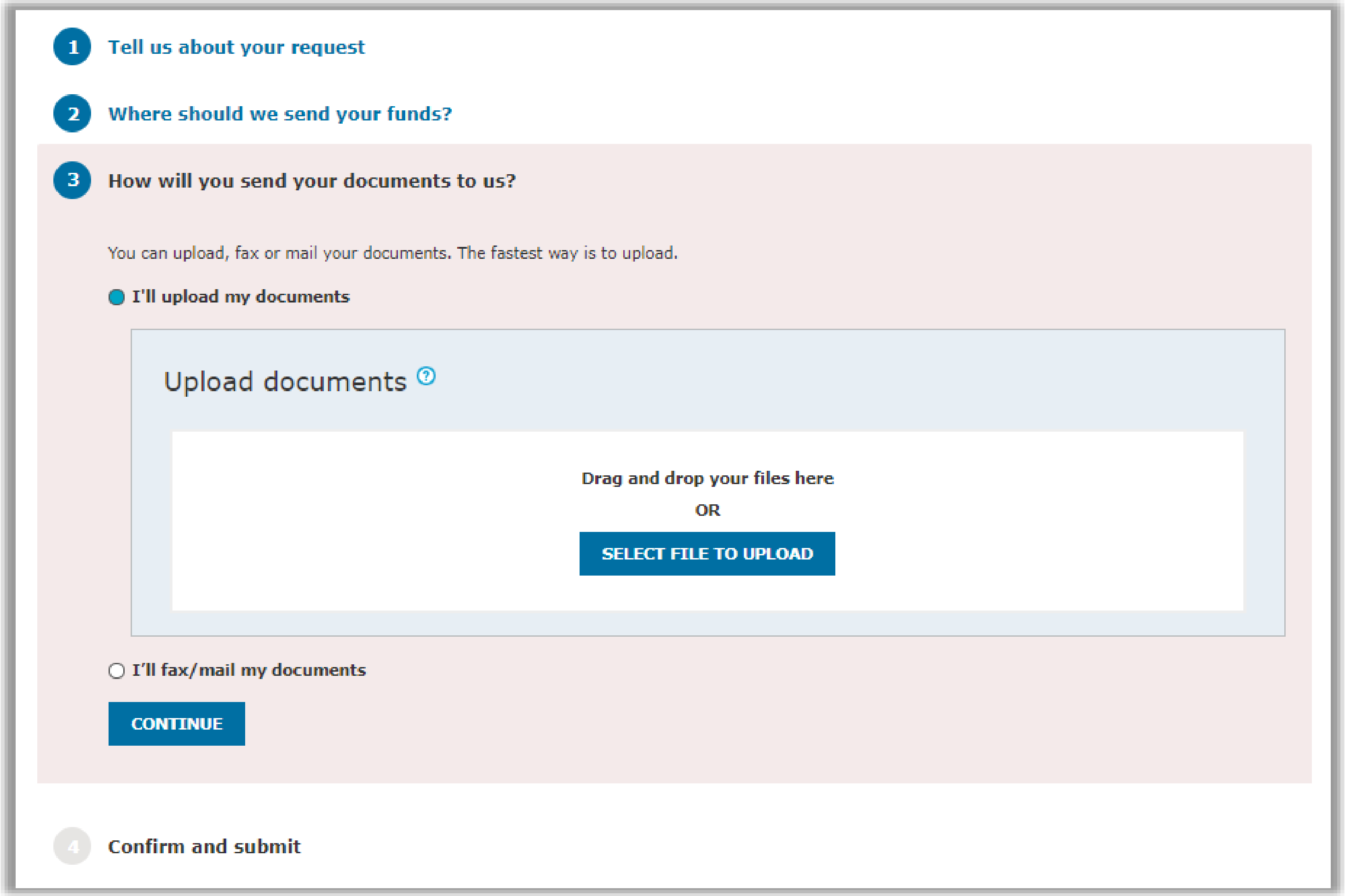

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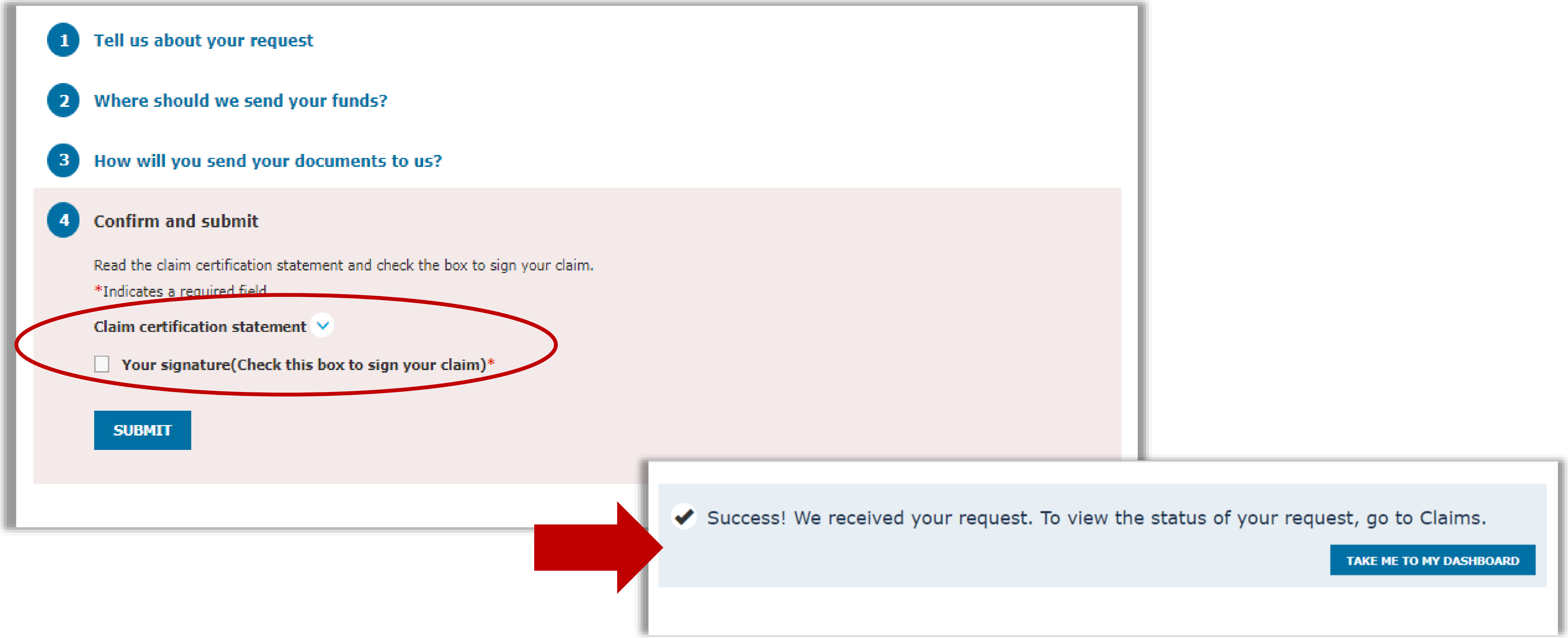

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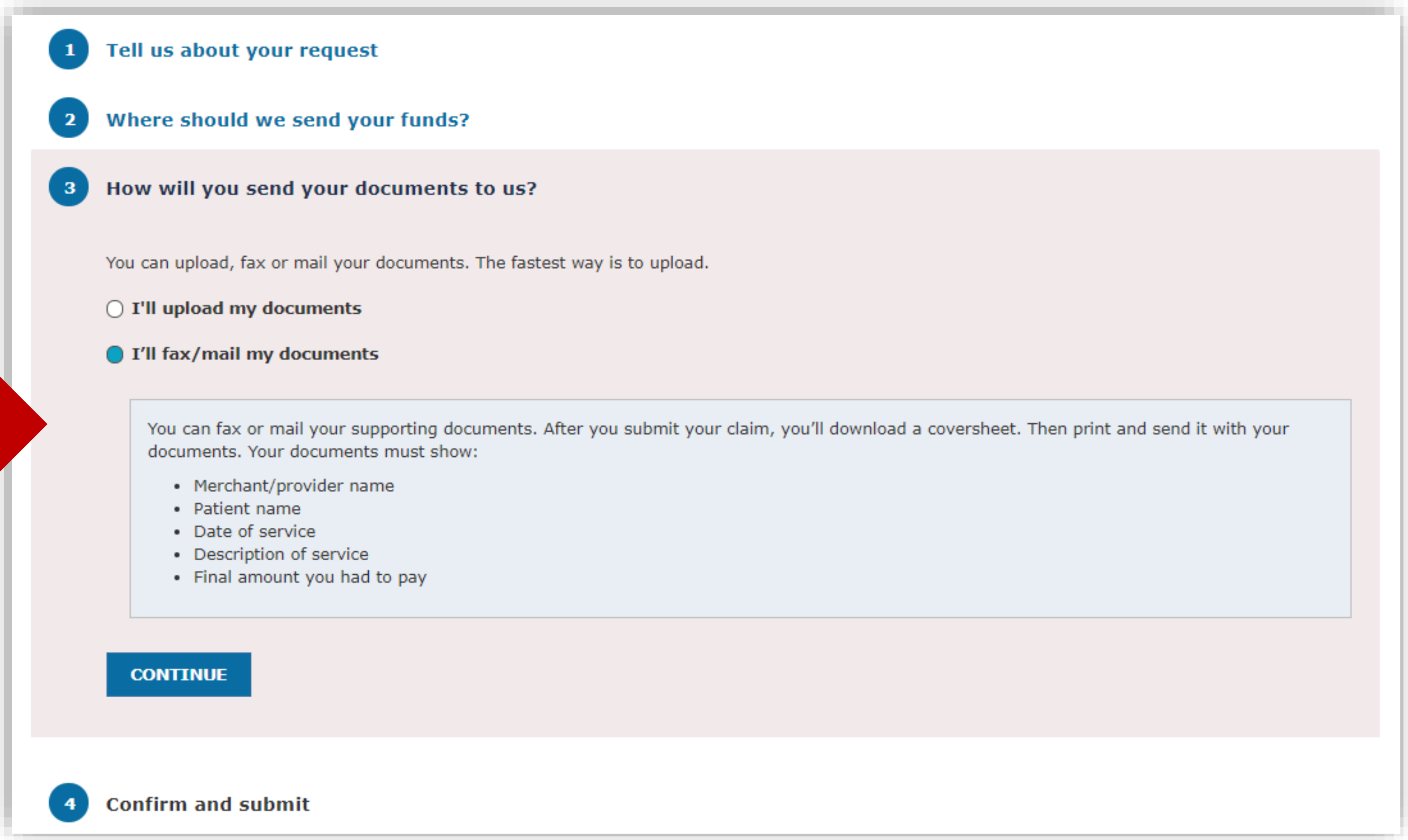

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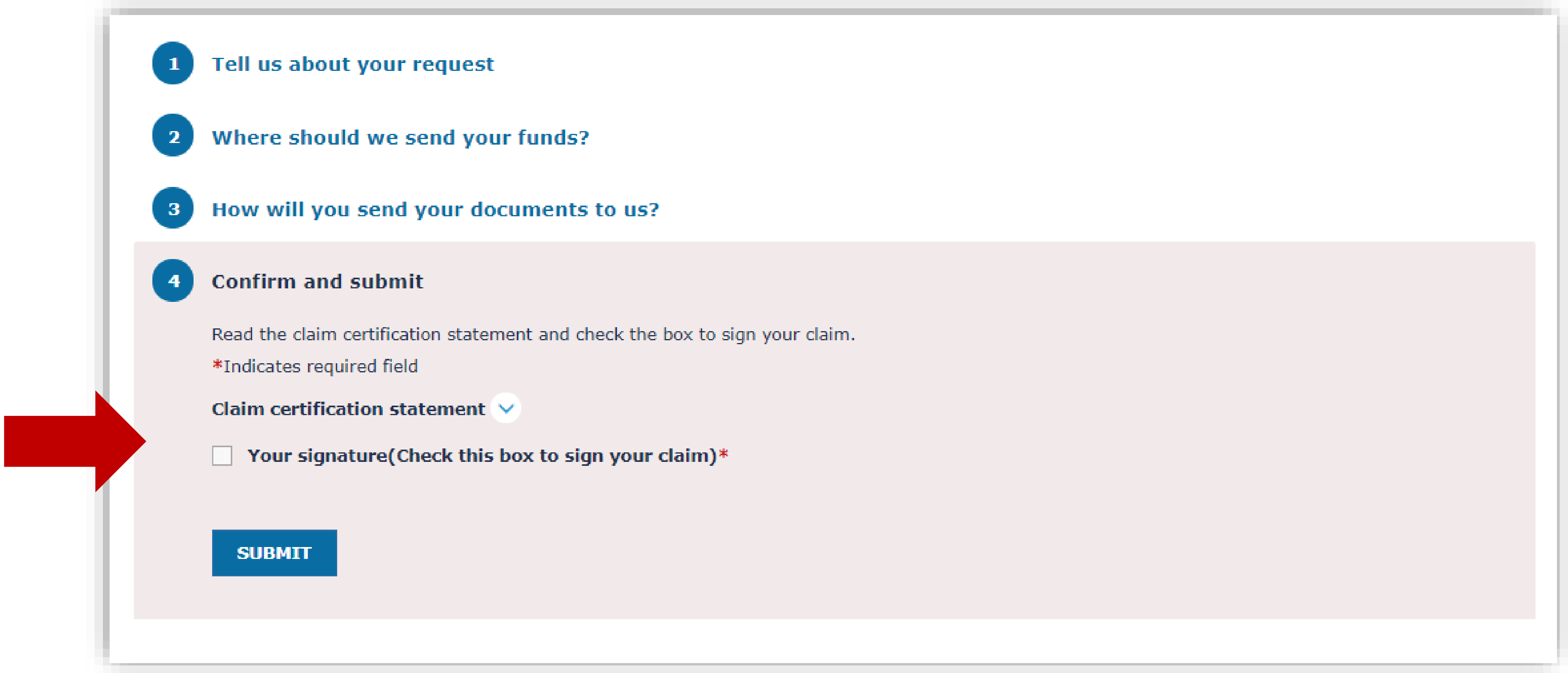

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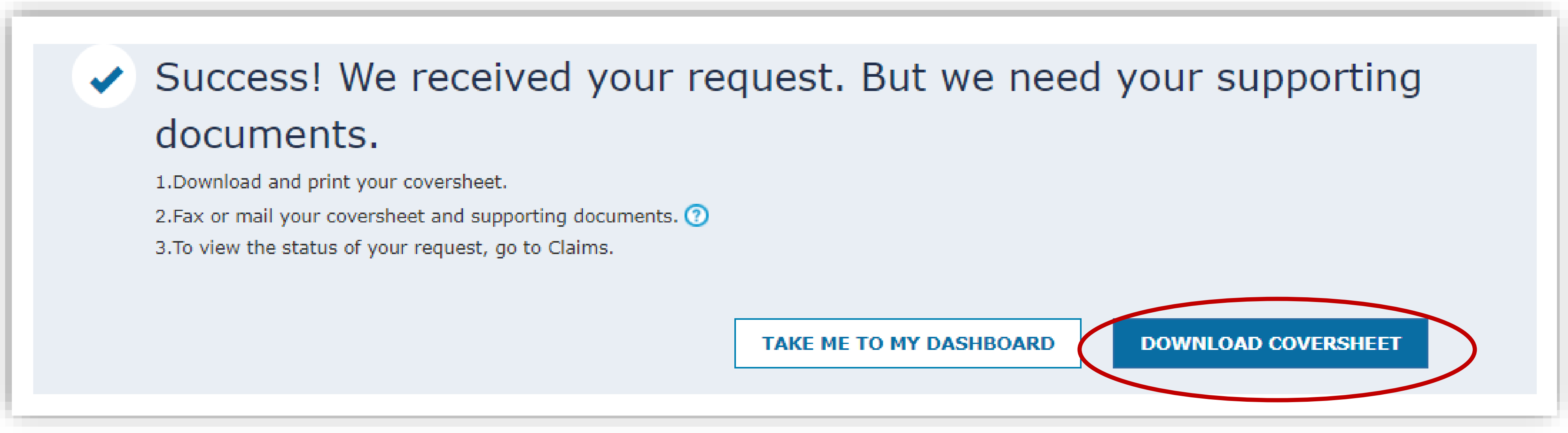
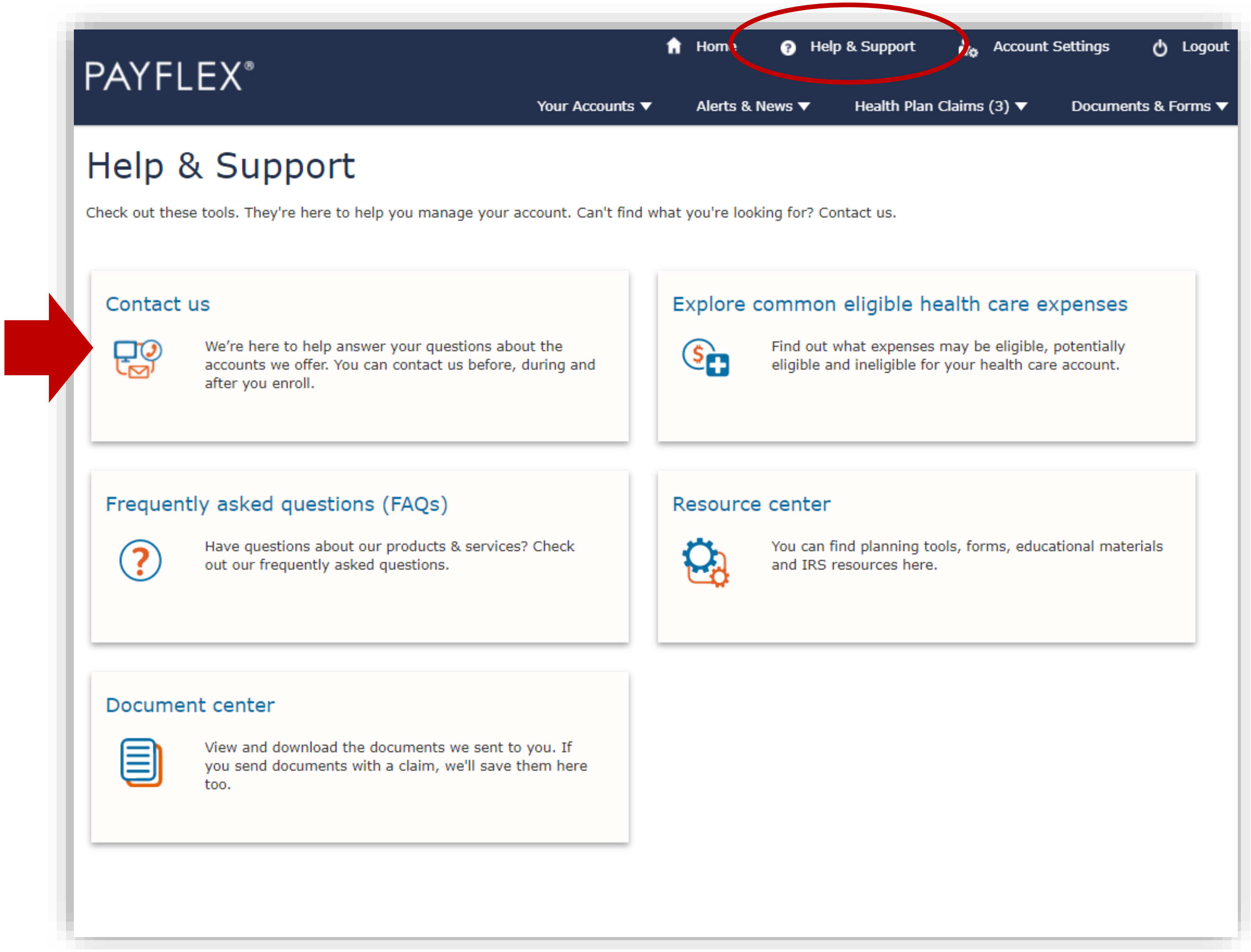


We're here to help!

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.



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