



CORPORATE PLANNING NETWORK

How to Guide for the
MyFlexSM Mobile App
iPhone & Android

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MyFlexMobile App Download and Login

- The MyFlexMobile App can be easily downloaded from the iTunes Store for Apple devices or the Google play store for Android devices. This app is free.



- Once the App has been downloaded to your mobile device, you can click on the MyFlexMobile App icon to access the log in page.



- The Myflex app will utilize the same Username and Password as the MyflexOnline website. Enter your MyflexOnline Username and Password or click 'REGISTER' if you have never logged into MyflexOnline. Click 'Log In' to continue.

MyFlex 2.0.0

REGISTER FORGOT

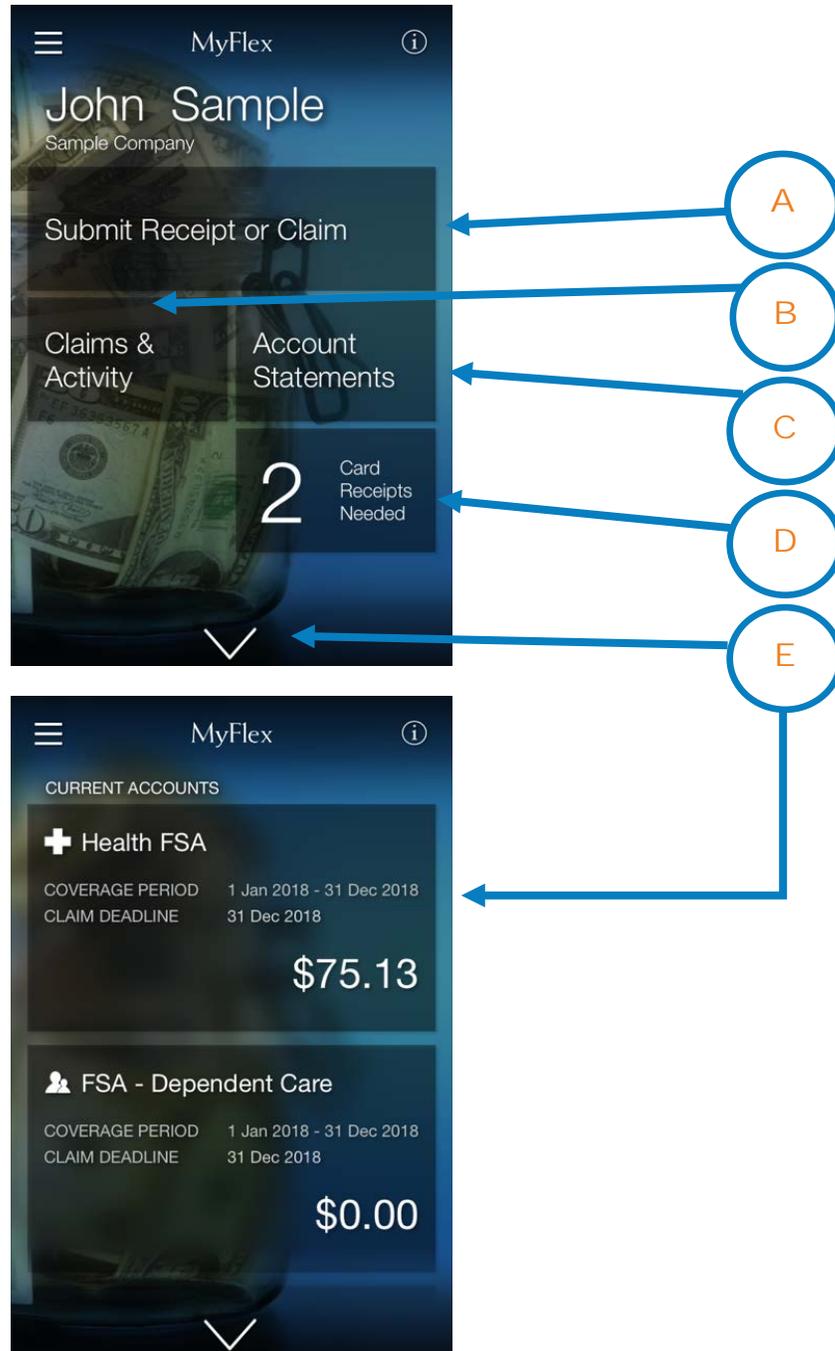
Username

Password

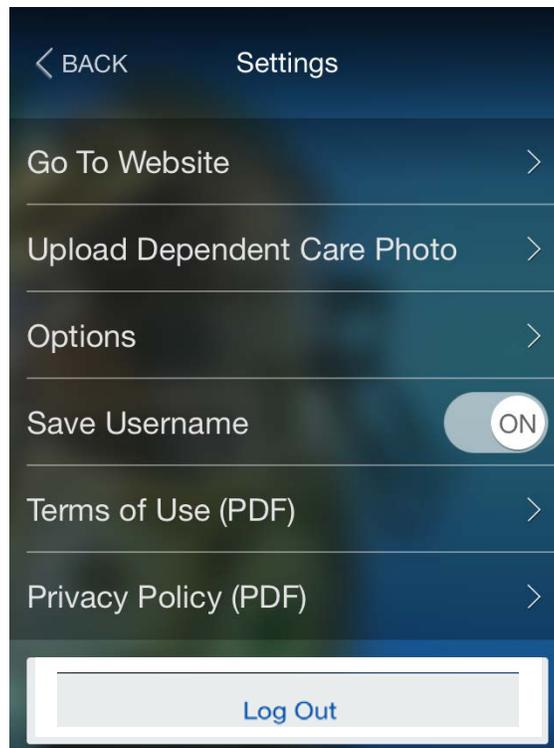
Save Username

Log In

- Once logged in, you have the option to:
 - a. Submit a receipt or enter a new claim by selecting 'Submit Receipt or Claim'
 - b. View claim information and account activity by selecting 'Claims & Activity'
 - c. View account information from 'Account Statements'
 - d. View claims that require a receipt for verification from 'Card Receipts Needed'
 - e. Scroll down to see a list of benefit balances, coverage period and claim deadline dates

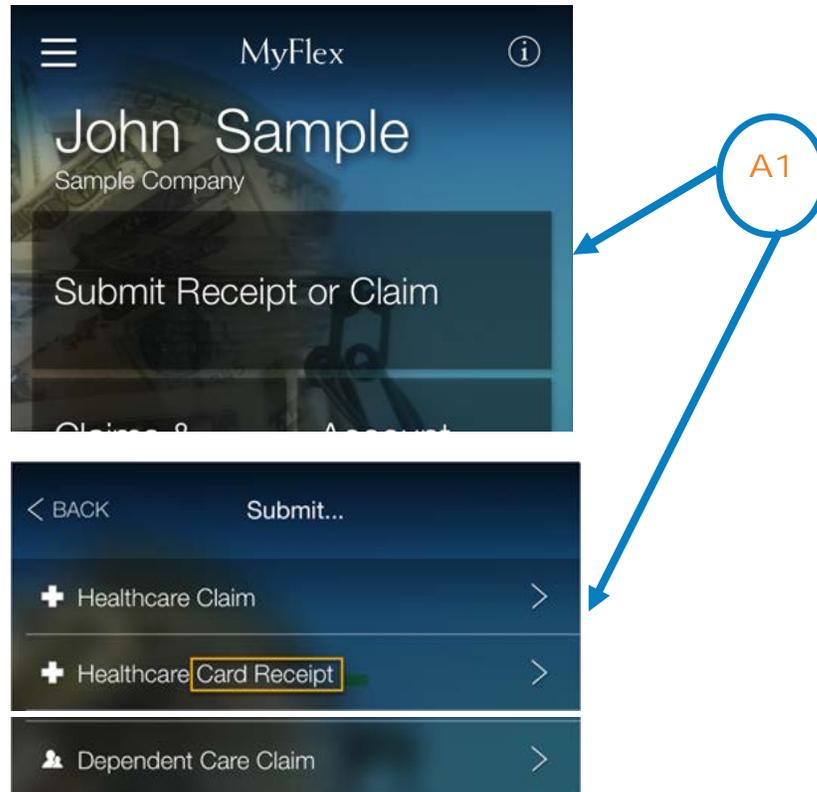


- You can click on the menu button (3 bars) in the upper left to view the MyFlexMobile app settings, terms of use, policy and additional links. For example, the 'Go To Website' link will take you to the MyflexOnline website.

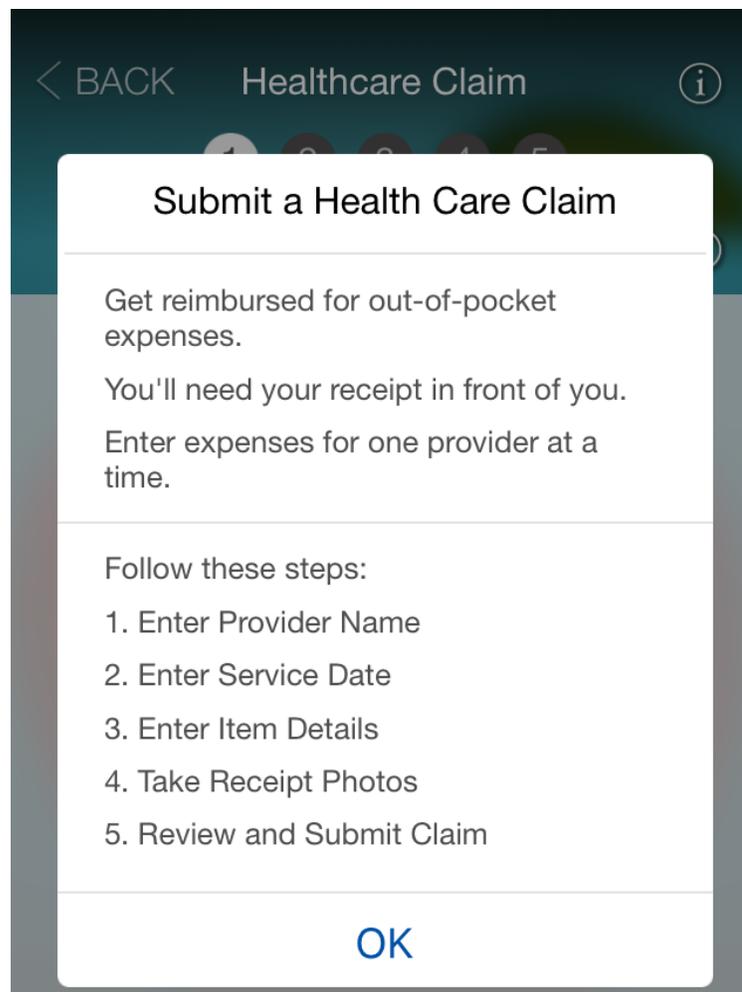
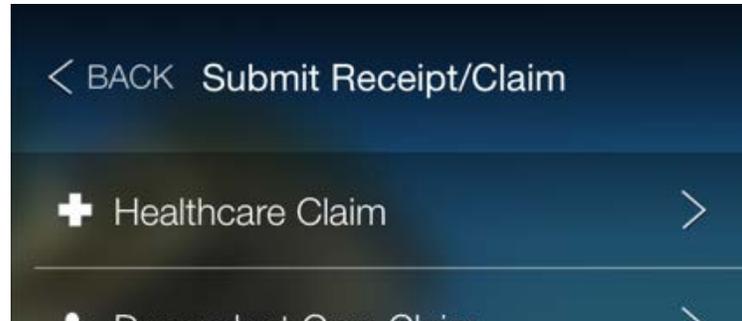


A. Claims Upload and Verifying Card Usage

1. To submit a new claim, click on 'Submit Receipt or Claim'. To submit a receipt for debit card transaction verification, select the benefit that includes 'Card Receipt' wording as shown below.

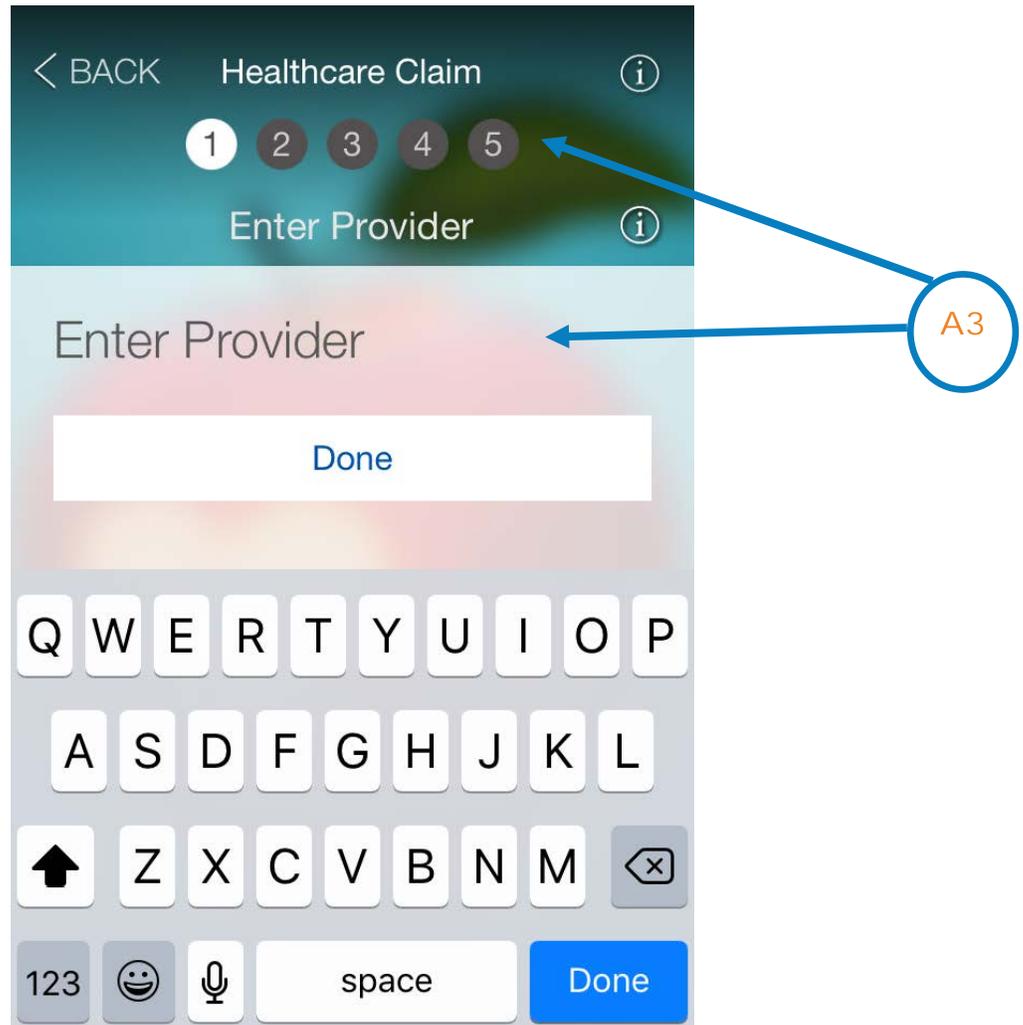


2. Select the benefit you want to submit a claim for by clicking on the benefit type listed. In this example we will submit a 'Healthcare Claim'.



The MyflexMobile app will guide you through the next 5 steps to complete the process, which are tracked at the top of the screen.

3. Using the phone key pad, enter the Provider name in the space labeled “Enter Provider”. Select ‘Done’ to continue.



4. Using the date reel, enter the claim service start date. Select 'Done' to continue.

Healthcare Claim

1 2 3 4 5

Select Service Date ⓘ

START DATE

November 1, 2018

Month	Day	Year
August	30	2015
September	30	2016
October	31	2017
November	1	2018
December	2	2019
January	3	2020
February	4	2021

Done

A4

5. Using the date reel, enter the claim service end date. Select 'Done' to continue.

Healthcare Claim

1 2 3 4 5

Select Service End Date ⓘ

START DATE
November 1, 2018

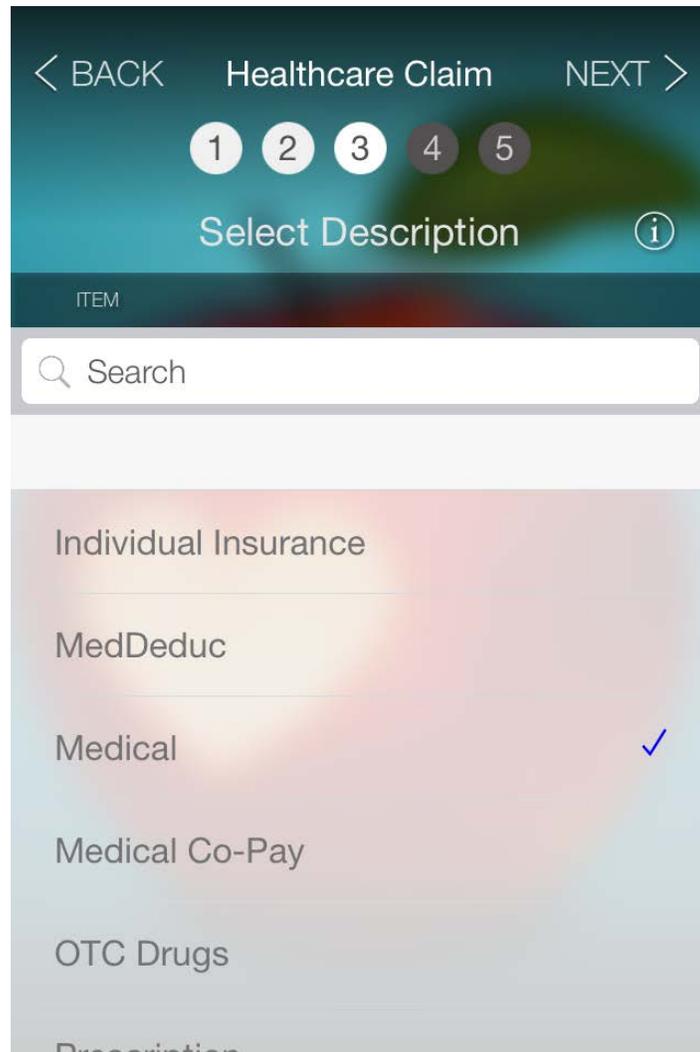
END DATE
November 1, 2018

August	29	2017
September	30	2016
October	31	2017
November	1	2018
December	2	2019

Done

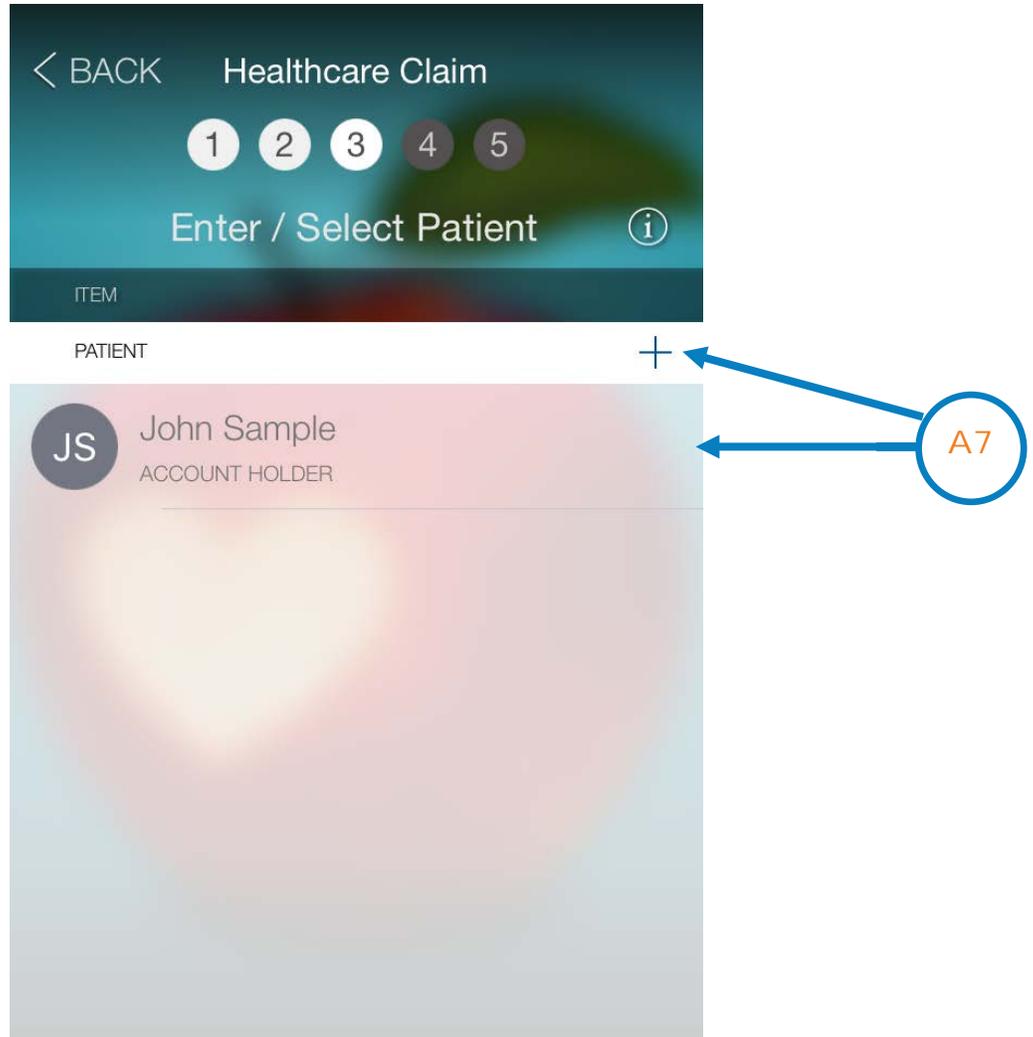
A5

6. Select the claim description from the list provided.



The screenshot shows a mobile application interface for a "Healthcare Claim". At the top, there are navigation buttons for "< BACK" and "NEXT >". Below these are five numbered steps: 1, 2, 3, 4, and 5. Step 3 is highlighted. The main title is "Select Description" with an information icon (i) to its right. Below the title is a search bar with a magnifying glass icon and the text "Search". Underneath the search bar is a list of items. The items are: "Individual Insurance", "MedDeduc", "Medical" (which has a blue checkmark to its right), "Medical Co-Pay", "OTC Drugs", and "Prescription". A blue arrow points from a circle containing the text "A6" to the "Medical" item in the list.

7. Select or enter the patient for which the claim applies to. To enter a new patient that is not listed on the screen, click "+".



8. Use the key pad to enter the claim amount. Select 'Next' to continue.

< BACK Healthcare Claim

1 2 3 4 5

Enter Claim Amount ⓘ

ITEM

AMOUNT

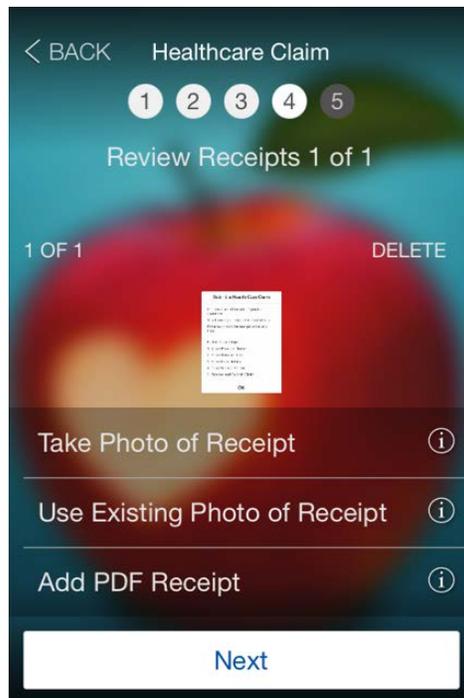
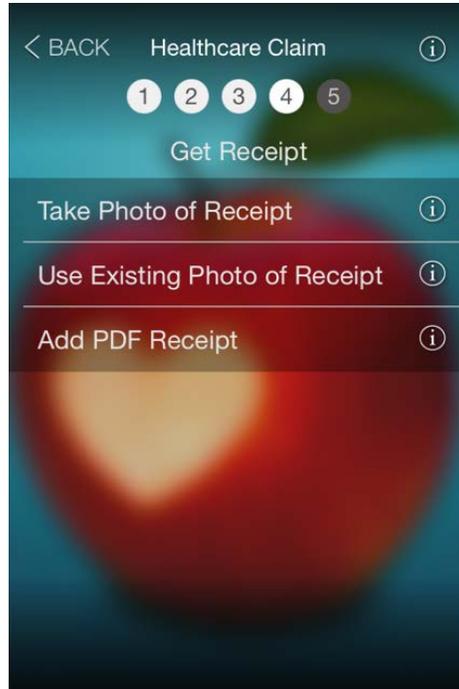
\$9.74

A8

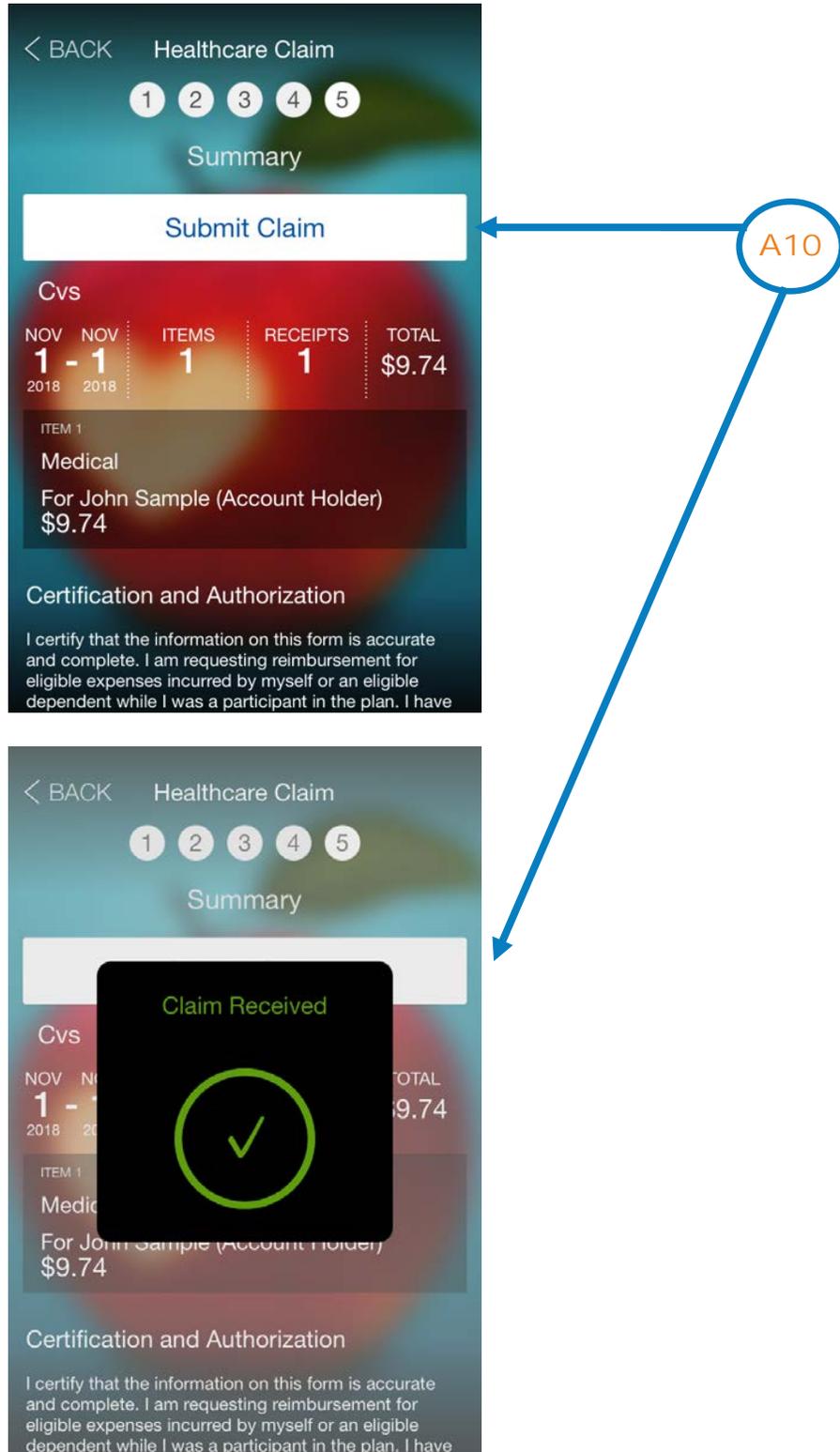
Next

1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ
	0	⌫

9. Choose the option you want to use for submitting a receipt with your claim. After you have confirmed the photo to be used, select 'Next' to continue.

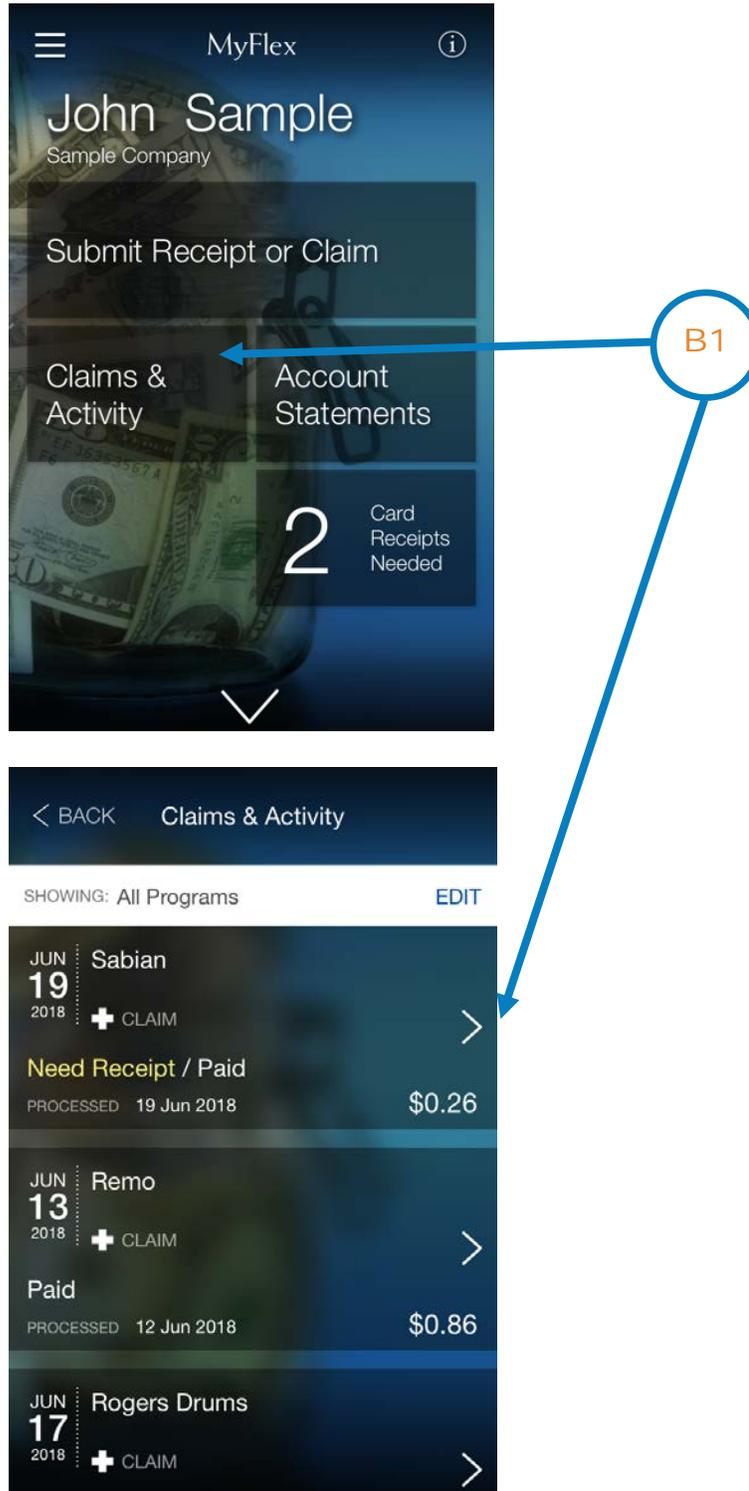


10. Confirm the information on the final screen is correct and click the Submit button to submit your claim(s). The app will confirm your claim was submitted. Also, note that the app automatically includes a Certification and Authorization statement.

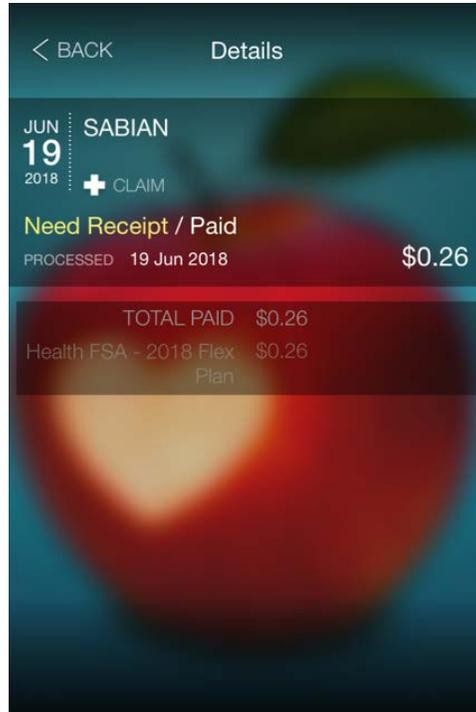


B. View Claims & Activity

1. If you select 'Claims & Activity', you can view your claim information. Click on the side arrows to view additional details about the specific claim.

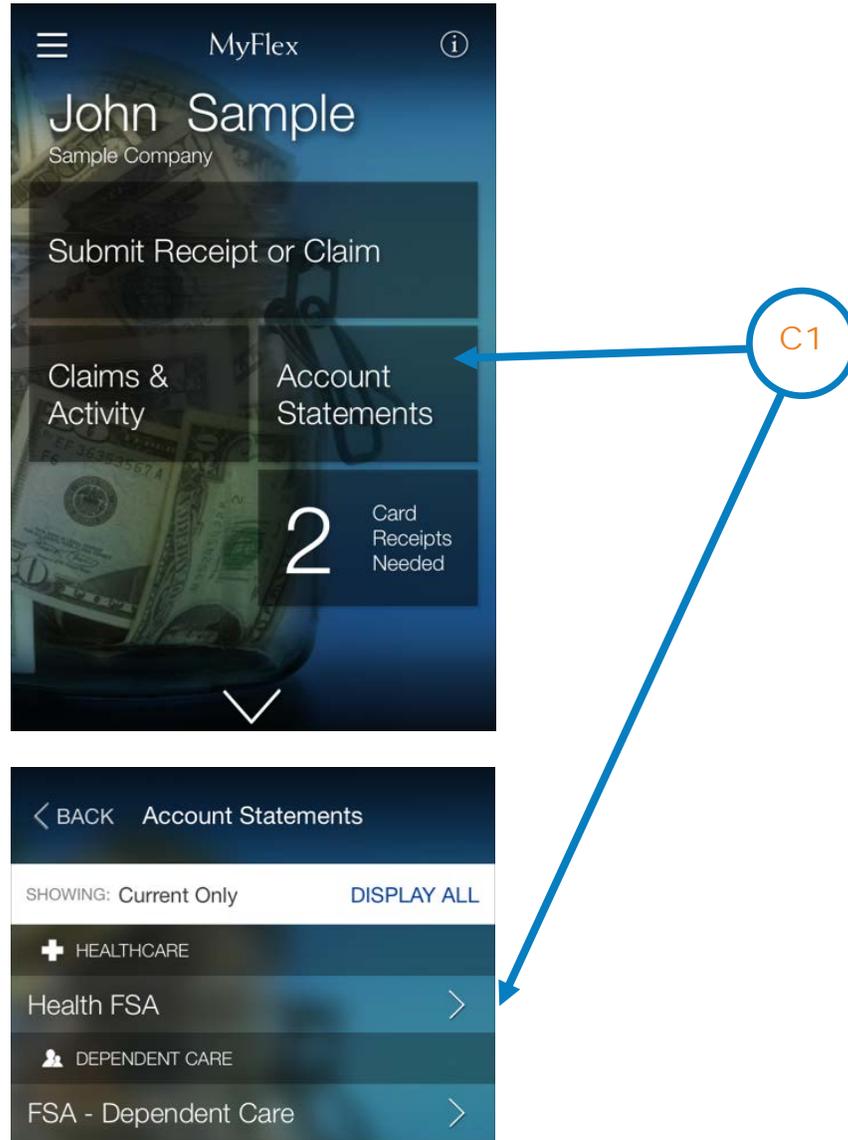


2. Additional claim details will show processed date, total amount paid and the benefit the claim was paid from.



C. Account Statements

1. If you select 'Account Statements', you can view your benefit account information. Click on the side arrows to view additional details about the specific claim.



2. Additional account details will show coverage dates, claim deadline dates and benefit account balance. Listed below the benefit information are claims associated with that benefit.

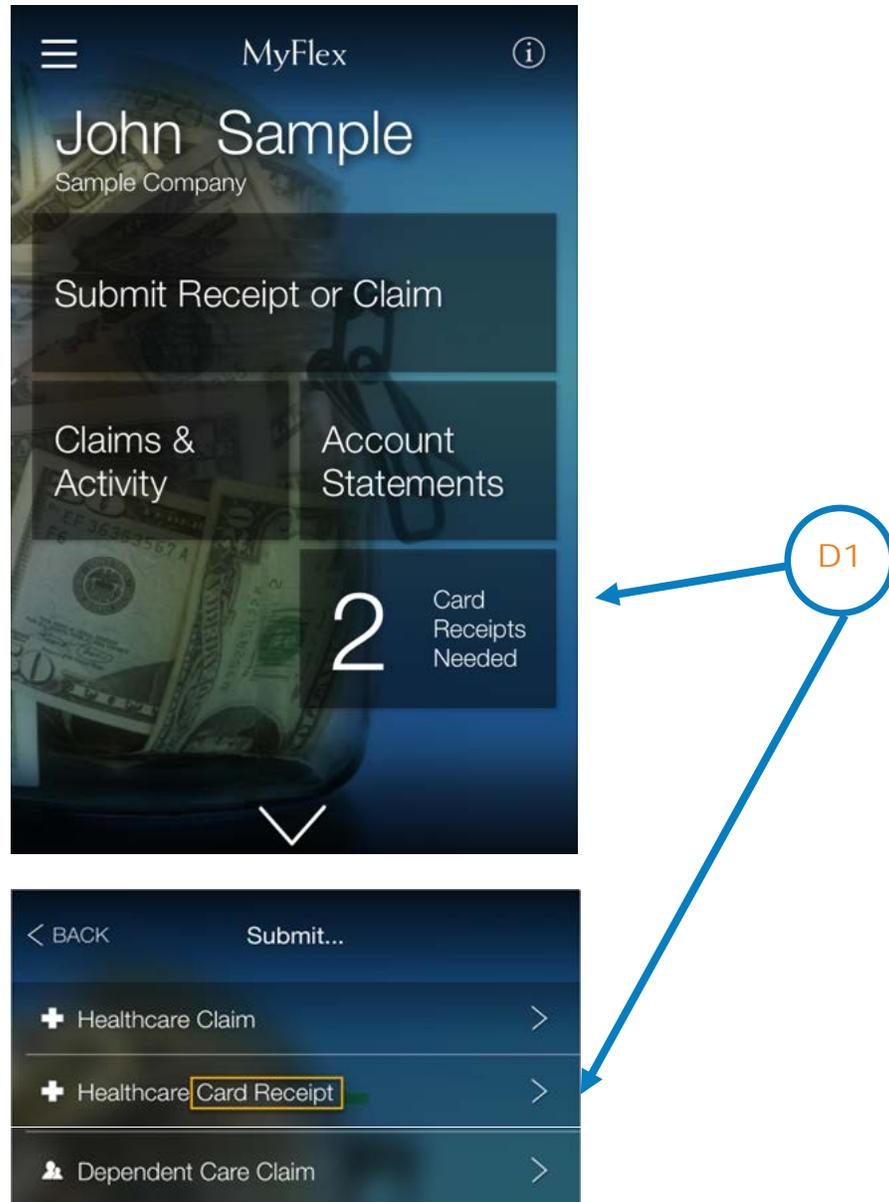
The screenshot displays a mobile application interface for a Health FSA account. At the top, there is a navigation bar with a back arrow and the text "Account Statement". Below this, a white plus sign icon is followed by the text "Health FSA". The account details section includes: "COVERAGE PERIOD" (1 Jan 2018 - 31 Dec 2018), "HSA-COMPATIBLE", and "CLAIM DEADLINE" (31 Dec 2018). A large white balance of "\$75.13" is shown. Below the balance, two claims are listed. The first claim is for "Sabian" on "JUN 19 2018", labeled as a "FLEX CLAIM", processed on "19 Jun 2018", with a value of "+ \$0.26". The second claim is for "Remo" on "JUN 12 2018", also a "FLEX CLAIM", processed on "12 Jun 2018", with a value of "+ \$0.86".

Claim Name	Date	Type	Processed Date	Amount
Sabian	JUN 19 2018	FLEX CLAIM	19 Jun 2018	+\$0.26
Remo	JUN 12 2018	FLEX CLAIM	12 Jun 2018	+\$0.86

D. Card Receipts Needed

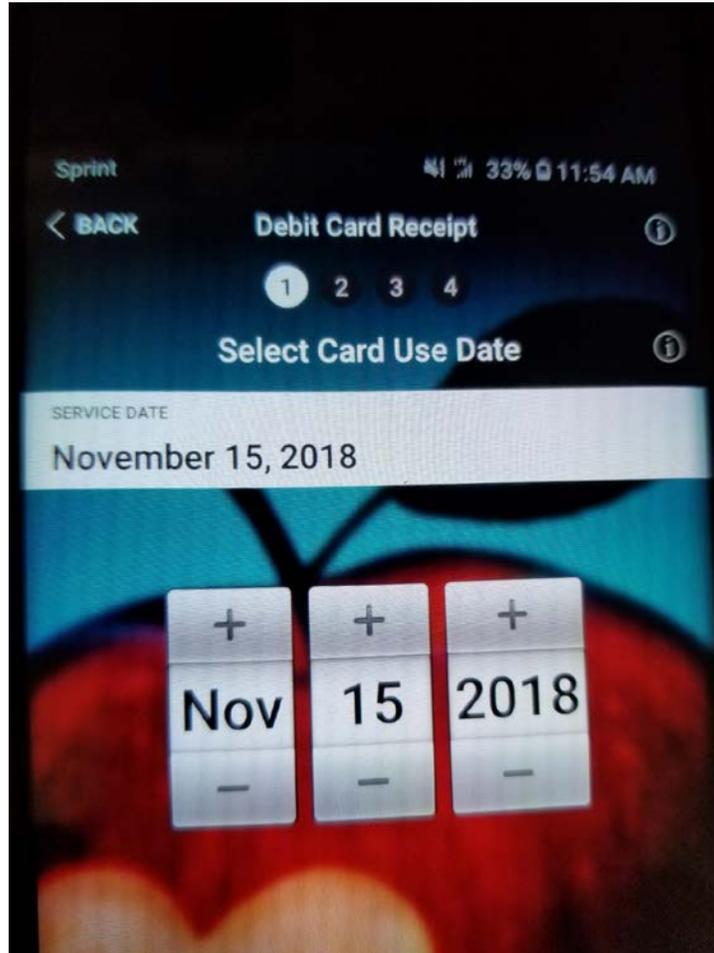
When applicable, the MyFlexOnline app will display a button for debit card transactions that require a receipt for verification. Debit card receipts can also be submitted using the 'Submit Receipt or Claim' button.

1. Click on 'Card Receipts Needed' to begin the process.

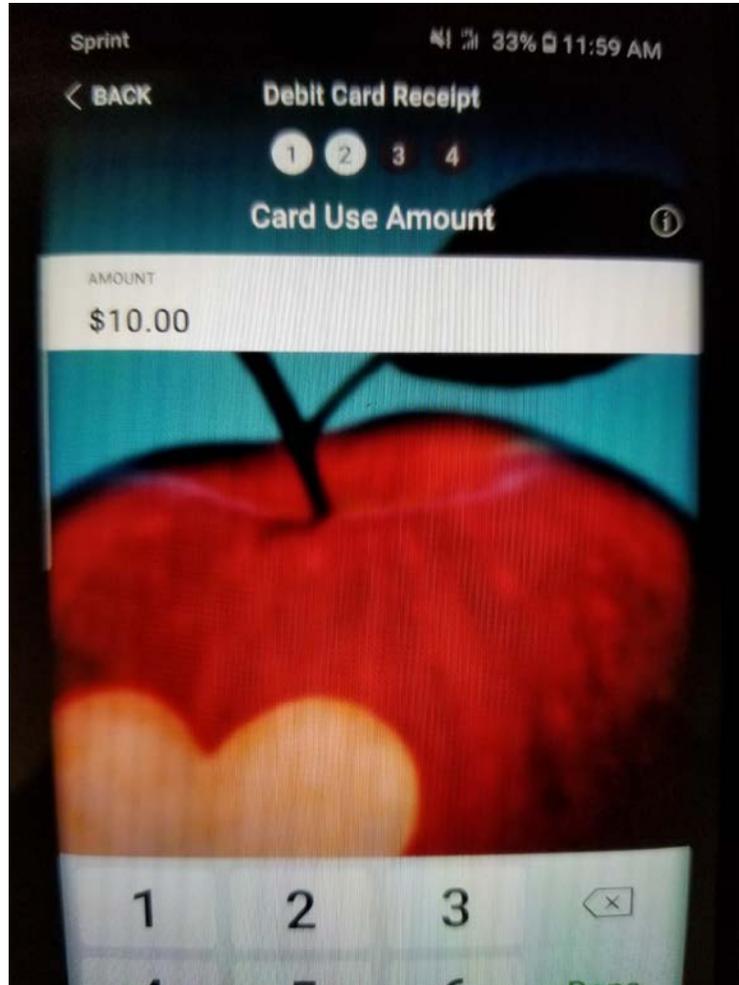


The MyflexMobile app will guide you through the next 4 steps to complete the process, which are tracked at the top of the screen.

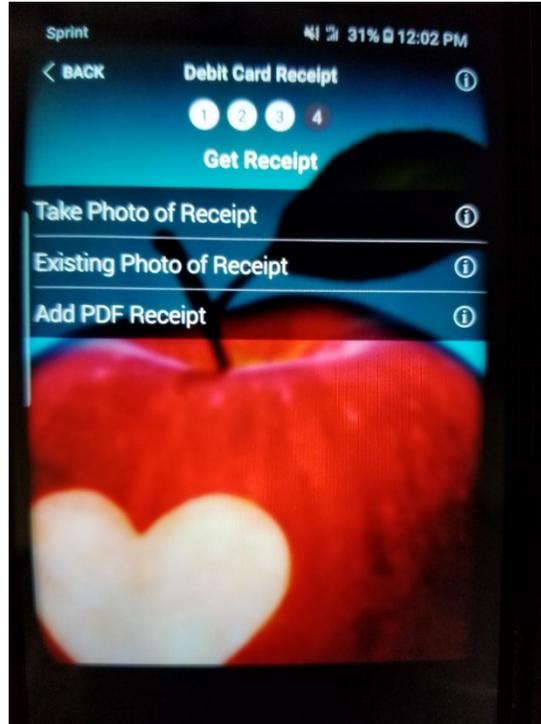
2. Use the date reel to select the card use date.



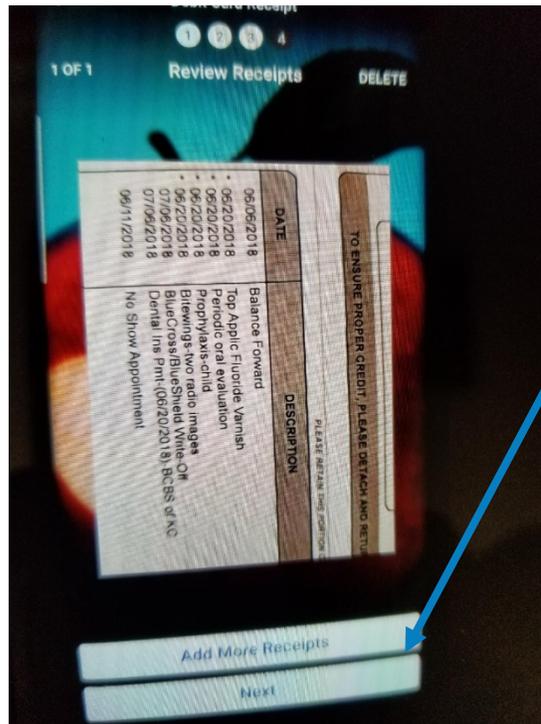
3. Enter the amount of the card swipe.



4. Choose the option you want to use for submitting a receipt with your claim. After you have confirmed the photo to be used, select 'Add more Receipts' if necessary or 'Next' to continue.



D1



5. Confirm the information on the final screen is correct and click the 'Submit Receipt' button to submit your receipt. The app will confirm your claim was submitted.

