Your Funding and Reimbursement Guide

OneExchange®

Instructions for Accessing your Online Account

Access and manage your funding information online

If you have not yet created an online account on the OneExchange website, we encourage you to do so. Your online account is the fastest, easiest way to access your funding information. Creating your online account is easy, helps reduce the amount of time you spend on the phone, and helps you manage your funding account.

Once you have created your online account, you may access your current funding information, including your account balance, at any time. If you need assistance setting up your online account, simply call OneExchange, select option two, and a representative will walk you through the process step by step.

Access your account

To access or create your account, enter the website address printed in your Welcome Letter into the address bar of your web browser. Next, select the **My Account** link on the website.

If you're a first-time user, some information will be required to create your account. If you're a returning user, enter your username and password.

Once you have logged in or created your account, select the **Funds & Reimbursements** tab.

Please note that any information that appears in other sections of your account about you or the plans you have selected was collected during your enrollment process.

Funds and Reimbursements

The **Funds and Reimbursements** section provides access to your funding information including current funding amount and funding contribution frequency. You can also scroll to the bottom of the page and click on the link **Contact Us** for phone numbers.

To find valuable information about your available balance, reimbursement and funding history, answers to frequently asked questions and links that allow you to file reimbursement requests, click on the **Manage Funds** button that will take you to the **Participant Home Page**.

Your eligible expenses

For your convenience, a sample list of eligible expenses is included with this mailing. For detailed information on specific eligible expenses, you should contact OneExchange customer service. If you misplace this printed list, you may access another one online or request to have one mailed to you. To print a sample list of the eligible expenses from your online account, go to the **Participant Home Page**. From there, you should locate **MORE ACCOUNT OPTIONS** down the left side, where you should click on **View Links**. This will bring up an **Information Details** listing of printable documents where you can locate and open a PDF of **Eligible Expenses.**

Enroll in direct deposit

Receive your reimbursements more quickly by having them deposited directly into your bank account. This speeds up the process and removes the risk of having a paper check lost or stolen.

You may manage your direct deposit settings in your online account.

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OneExchange's Website and Your Online Reimbursement Request

To set up direct deposit, log into your OneExchange online account and select the **Funds & Reimbursements** section followed by the **Manage Funds** button. From this page, you should select **Complete Electronic Deposit for Claim Payment** under **ALERTS.** This will bring up an **Electronic Deposit Information** page where you will be able to submit your banking information. You may also mail or fax the direct deposit form included in this mailing or call OneExchange and select option three to set up direct deposit over the phone.

File a reimbursement online

To file a reimbursement using your online account, go to the **Funds & Reimbursements** tab section, followed by clicking on the **Manage Funds** button and then selecting the **Enter New Claims** button.

To enter your reimbursement, first select the claim category and type. Then you should enter the amount, provider, service date you incurred the expense, the account holder, and any notes you would like to add followed by clicking the green **Continue** button. This will take you to a **Manage Claims** page. If you have more than one reimbursement, there is an option for **Enter Another Claim**. Once you have finished entering all of your reimbursements, click **Submit**.

If everything is entered correctly, this will bring you to a **Claims Success** page, where you can select a method to submit your receipts for this reimbursement. We recommend uploading your receipts/documentation, as this will expedite the processing of your reimbursements. You may also fax or mail your receipts and documentation.

Submit your receipts online

To submit your receipts online once coming to the **Claim Success** page, click on the **Upload Supporting Document** link, and then follow the directions provided. Note that receipts submitted online must be in TIFF, PDF or single-page JPEG format and less than 5 megabytes. Most phones equipped with a camera or a desktop scanner can create a PDF file.

To submit your receipts by fax

To submit your receipts by fax, click the **Cover Sheet** link under fax from the Claim Success page, which will bring up a cover sheet. Please note your internet browser pop-up blocker must be disabled. Print and sign your coversheet, then fax it along with your documentation to the number provided on the coversheet. Be sure to include all your receipts and supporting documentation.

A reimbursement is not considered complete and cannot be approved until all of its supporting documentation is received.

To submit a reimbursement through the mail or fax

To submit a reimbursement through the mail or fax, use the paper reimbursement form included with this mailing. You may make copies for future use, print additional forms online, or request more forms by calling OneExchange, select option three. As you complete the reimbursement request form, please follow the instructions carefully and use the address or fax number listed on the form. Remember to include your receipts and other documents you need to support your reimbursement request.