



# FlexFacts Mobile App

Your guide to getting started

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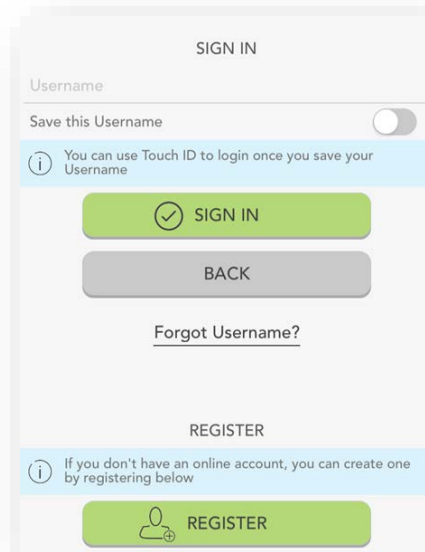
## FlexFacts Mobile

Managing your benefit account(s) on-the-go is made easy with the FlexFacts Mobile application. This powerful, intuitive mobile app gives you access to view your account balances, update your profile, submit a claim, and much more, right from your Apple or Android mobile device. This guide is intended to provide a detailed overview of the FlexFacts Mobile application features, so you can be sure you are getting the most out of your benefit account(s).

### Getting started

Your login credentials for FlexFacts Online Participant Portal and FlexFacts Mobile App are the same. After downloading the application, the login screen will provide two options, 'Sign In' or 'Register'.

- If you already have a FlexFacts Online Participant Portal or FlexFacts Mobile App username, enter it and tap 'Sign In'. You may be asked some security questions, and then you will be prompted to enter your password.
- If needed, you can retrieve a forgotten username from the sign in screen and reset a forgotten password from the password entry screen.
- If this is your first-time logging in to both FlexFacts Online Portal and FlexFacts Mobile App, you must register before you can access the application.



### Registration

Tap the 'Register' button.



Complete the registration form (above left). Select a username, and create and confirm a password meeting the specifications provided. Your employee ID and employer ID can be obtained from your employer. In lieu of the employer ID, you can also register using your benefit card number, if available.

In the next steps, select and answer four security questions (above middle), verify your name and email address, and complete your registration. These same steps are required when registering on the FlexFacts Online Portal.

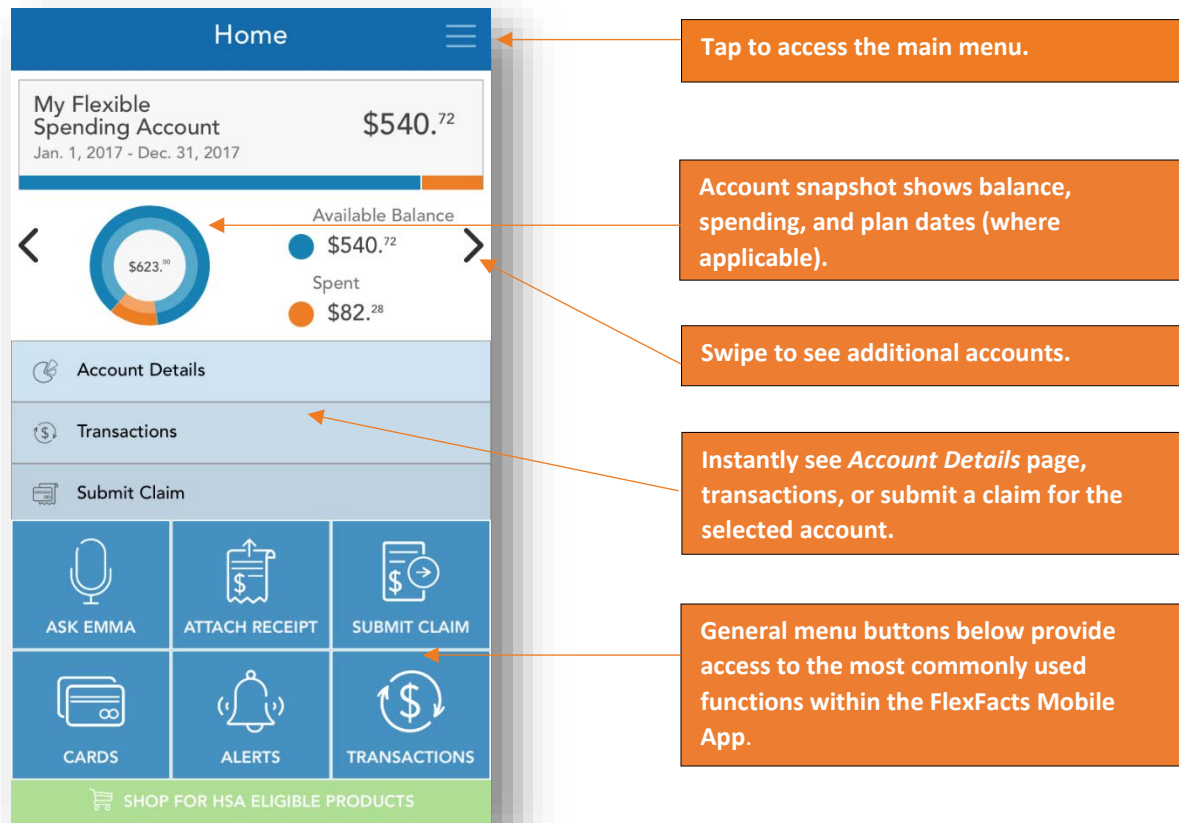
### Touch and face recognition access

If your device uses touch or face recognition access technology (Touch ID and Face ID for Apple devices, or Fingerprint Access for Android devices), you can choose to enable them to access FlexFacts Mobile. Simply choose to save your username on the sign in screen, and after signing in, you will be presented with the option to enable touch or face recognition access.

View your touch/face recognition access status and disable it at any time via the 'Settings' screen.

### Homepage

Once you are registered and/or logged in, you will see the homepage, with snapshots of each account, including your balances and plan dates. Swipe to view snapshots of additional accounts. Menu buttons at the bottom of the screen allow you to reach the most commonly used pages with a single tap.



1. Attach receipt – Instantly view all pending claims, and easily attach your receipts using your device camera
2. Submit claim – Submit a new claim for reimbursement
3. Cards – View card details, access PIN, mark your card as lost or stolen
4. Alerts – Access important messages from FlexFacts
5. Transactions – View all your transactions on one page, including claims, card transactions, and deposits

## Submitting a claim

The *Add Claim* screen allows you to enter and submit a new claim for reimbursement. If you have a receipt to substantiate your claim, you can take a photo of it with your device and attach it to your claim submission.

The screenshot shows the 'Add Claim' screen with the following details:

- Service Start Date:** Mar. 8, 2018
- Service End Date:** None
- Reimburse Provider?:** No (selected)
- Claimant:** Elizabeth Sample
- Reimbursement Method:** Direct Deposit
- Provider:** Dr. Smith
- Account Type:** Flexible Benefit
- Claim Amount:** \$50.00
- Comments:** (empty text area)
- Receipts:** One receipt is shown for Mar. 8, 2018, with an 'Add Receipt' button next to it.
- Preview:** A green button with a checkmark and the word 'PREVIEW' is at the bottom.

What date(s) did the services related to this claim take place?

Request reimbursement for yourself or choose to have funds sent directly to your provider.

Be sure to click 'Add Receipt' to attach your substantiating documentation for the claim. You can use your device camera to take a photo of your receipt.

### HSA bill pay

If you are enrolled in an HSA, you can submit a bill payment to a healthcare provider or withdraw funds to reimburse yourself for eligible out-of-pocket healthcare expenses. Just tap 'Bill Pay' from the main menu, and then tap to add a new payment.

The screenshot displays the 'Make a Payment' interface. At the top, there is a blue header with a back arrow and the title 'Make a Payment'. Below this is an information box with an 'i' icon: 'You may withdraw funds to your external bank account (be sure to add one prior to requesting a withdrawal. You can do it from your "Profile" page) or you can make a payment to anyone, such as a provider.' The 'HSA Custodian' is set to 'WealthCare HSA'. The main section is titled 'Enter your payment request below' and has two tabs: 'Pay Provider' (selected) and 'Withdraw Funds'. The 'Amount' is \$50.00 and there is a 'Memo' field. Under 'Payment preferences', 'Weekly' is selected over 'Once' and 'Monthly'. The 'Send out Payments on' date is 'Mar. 9, 2018'. An information box below the date states: 'Remember, the requested date above is the mail date and the date the funds will be removed from your account. You must allow 7-10 business days for payment to reach the provider.' The 'Payee Name' is 'Dr. Smith' and the 'Account # with Payee' is '123456789'. A green 'PREVIEW' button is at the bottom.

Choose to pay a provider or pay yourself for eligible services. If you choose 'Pay Provider' specify your provider's payment information by selecting from a pre-loaded list. If you do not see your provider, you can add their information manually.

If this is a recurring expense, you can configure payment to automatically issue weekly or monthly.

## Resolving pending transactions

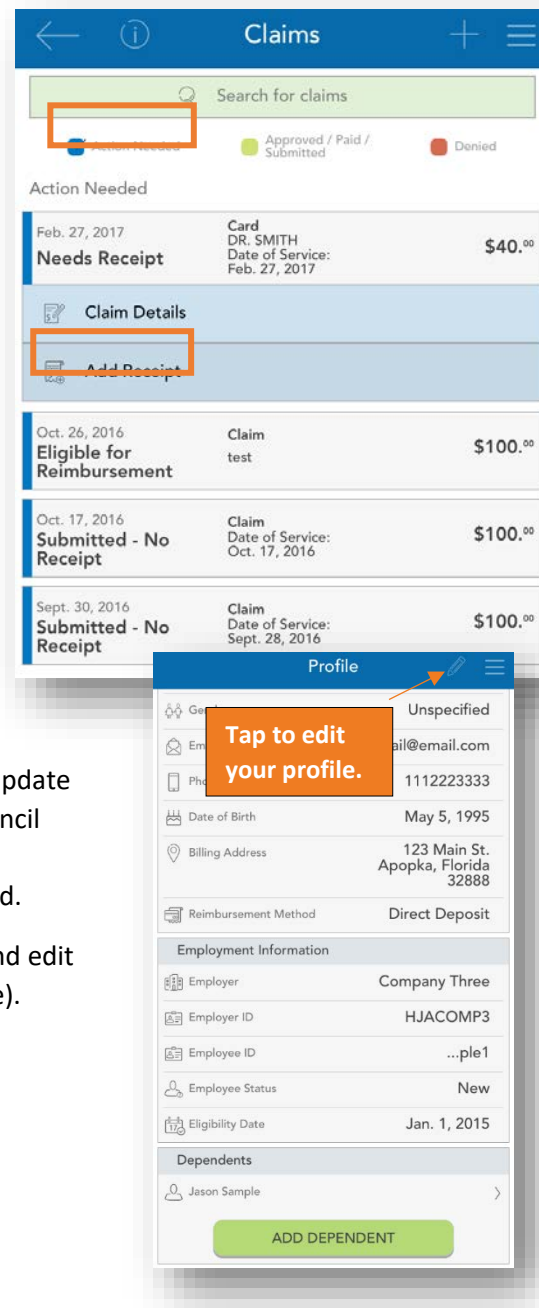
To view a list of transactions requiring your attention, navigate to the *Claims* page by tapping 'Claims' on the main menu (or the 'Attach Receipt' shortcut button on the homepage), and ensure the 'Action Needed' filter option is selected at the top of the page.

To resolve a pending transaction, tap the transaction and select to add a receipt. As stated previously, you can use your device camera to take a photo of your document(s), and then submit for review.

## Viewing and updating your profile

Your user profile contains information about you, your employment, and your dependents. It's essential to keep these items up-to-date. To view and update your profile, tap 'Profile' on the main menu. Tap the pencil icon in the upper right corner to edit your email, phone number, address, and preferred reimbursement method.

You can also tap your dependents to similarly review and edit their information or add a new dependent (if applicable).



## Managing alerts and messages

FlexFacts Mobile App stores two types of communications:

1. Alerts are brief, event-triggered notifications sent to you via email or text message to keep you in tune with your account(s). For example:
  - Confirmation that you have been successfully enrolled in a plan.
  - Notification that your address has been updated in the system.
  - Acknowledgement that a submitted manual claim has been received by FlexFacts.

- Messages are important letters generated by FlexFacts to notify you of claims requiring further substantiation, or to provide information on the status of a reimbursement. Typically, these messages will also be mailed or emailed to you with instructions to access additional details by logging in to FlexFacts Online Portal or FlexFacts Mobile.

## Ask Emma voice response system

You can obtain information about your benefit account(s) by simply 'asking Emma'. Emma intuitively answers basic questions related to transactions, account balances, and more.

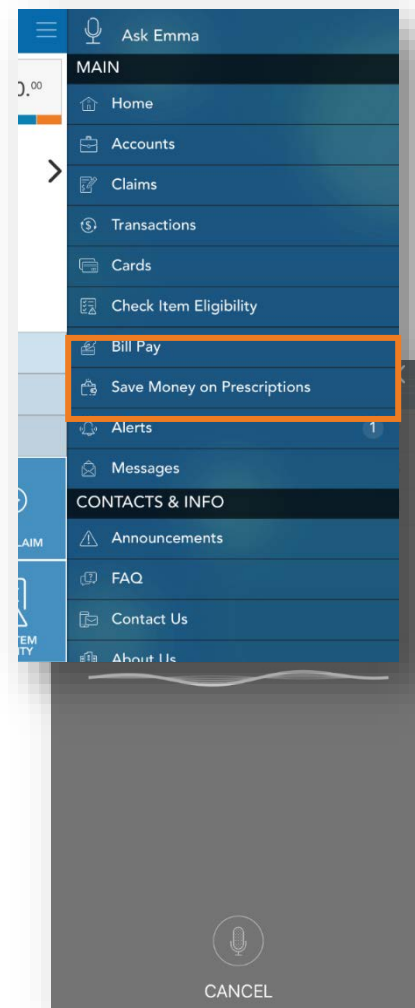
Ask questions like:

- What is my balance?
- What are my last five transactions?
- How much can I contribute to my HSA?

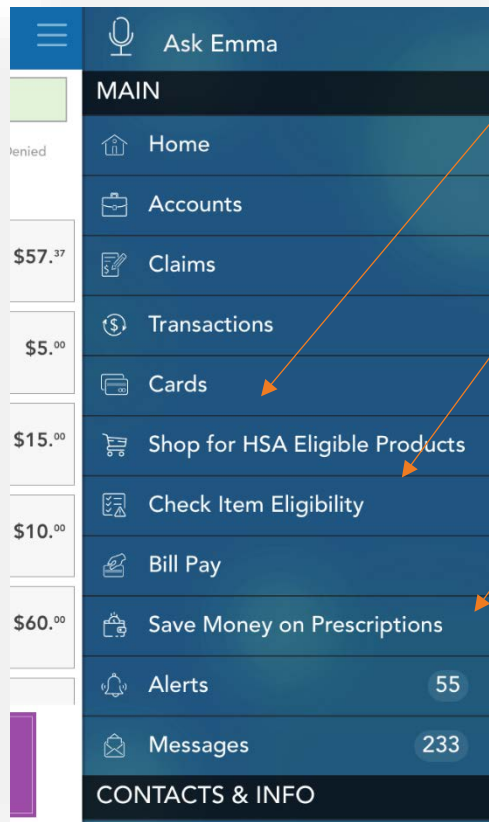
Activate Emma by tapping the 'Ask Emma' link at the top of the main menu, or by tapping any screen with four fingers simultaneously (you must be logged into the app). The screen shown to the right appears when Emma is "listening".

## Additional features

We are constantly striving to make navigating your benefit account(s) simple, convenient, and fun! Check out these additional noteworthy features:







Shop for eligible products

HSA and FSA Store make it easy to spend your dollars on eligible items. Tap to visit them online.

Check item eligibility

Use the front-facing camera on your device to scan merchandise barcodes in-store to instantly determine their eligibility!

Save money on prescriptions with GoodBuyRX

Tap to access the ultimate pharmacy savings card! Simply present your card image (stored in FlexFacts Mobile) at over 60,000 participating pharmacies to

**Questions?**

To learn more about FlexFacts Participant Mobile contact FlexFacts at 877-943-2287 or visit FlexFacts.com.