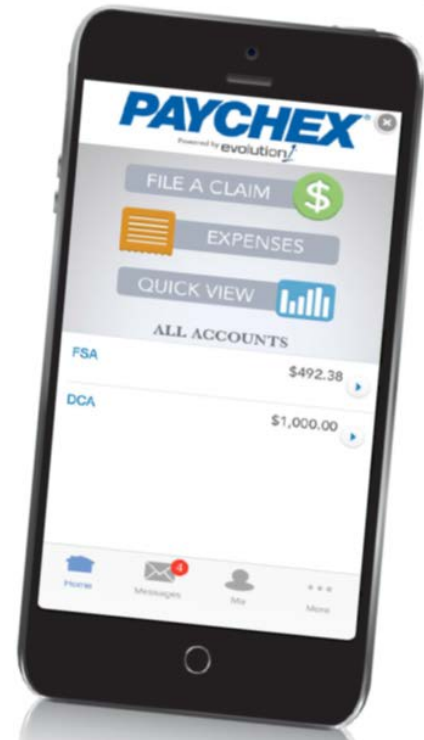


# ***Sign Up for the New PBA Mobile App!***

You can use the mobile app to:

- see how much you have left in your FSA account,
- submit new claims by taking pictures of the receipt with your phone and uploading the receipts,
- check claim status and reimbursements,
- review debit card usage,
- manage personal account information, and
- sign up to receive text messages about important account status alerts!



Mobile app sign up instructions are included in the attached Paychex Benefit Account Employee Web User Guide.



Payroll • HR • Retirement • Insurance



# *Paychex Benefit Account Employee Web User Guide*



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## Accessing your Paychex Benefit Account Online for the First Time

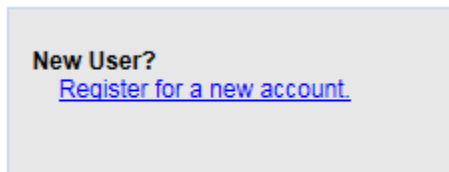
If you have already created your username and password, please go to page 5.

### Step 1

To create your account online, go to <https://benefits.paychex.com>

### Step 2

For your initial login, click register for a new account



### Step 3

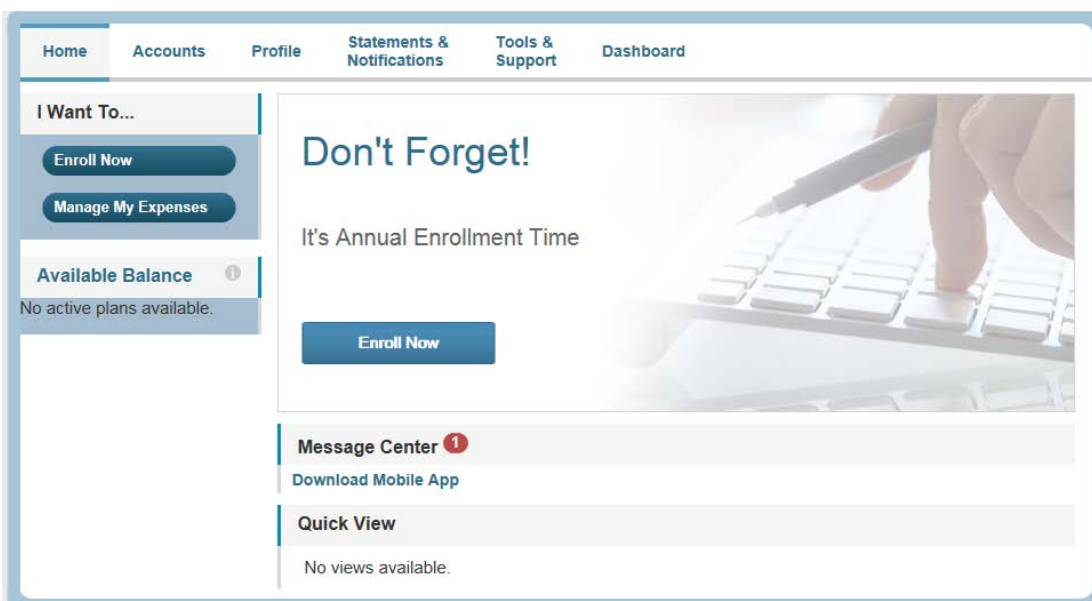
Once you successfully create your username, you will receive a pop-up message to continue. Click **OK**; follow the prompts to the Message Center.

### Step 4

Your account has now successfully been created. Click **Paychex Benefit Account** on the left navigation menu to access your FSA account.



Your PBA account homepage will appear:



**Note:** If you are accessing your account during an open enrollment period, click **Enroll Now** and follow the prompts to sign up for your Paychex Benefit Account.

If you have any questions, please contact Paychex Benefit Account Services at **877-244-1771**, or [PaychexBenefitAccount@paychex.com](mailto:PaychexBenefitAccount@paychex.com)

**Step 5:** You are almost done with your account setup. If you have a smartphone, don't forget to register for the Paychex Benefit Account Mobile Application & Text Alerts. Click on **Download Mobile App** from the Message Center on the Homepage and follow the instructions.

### Downloading the New Mobile App

This is an upgraded Paychex Mobile App specific to your Flexible Spending Account. If you already have a Paychex Mobile App, you may still be required to download this new application.

You will be prompted for a username and password in order to access the mobile app. Your username will be displayed on the following screen (it is not included in this image for security purposes). The password to download the application will be set to your first initial, last name followed by the last four digits of your social security number (SSN).

### Mobile Access

Access your account anytime, anywhere. Easily check your balances and manage your account on the go with the new apps for the iPhone & iPod touch and Android mobile devices.

Check available balances 24/7

View important alerts about deadlines affecting your account

Easy, secure login

[Get the iPhone & iPod touch App](#)

[Get the Android App](#)

[Set Up Text Alerts](#)

## Welcome to the Paychex Employee Portal!

You will find the employee portal to be a useful, self-service portal that provides tools so you can understand and manage the activity on your Paychex Benefit Account plan.

### Logging In

To log in to your Paychex Benefit Account:

1. Go to <https://benefits.paychex.com>
2. Enter your username and password
3. Click **Sign On**

### Logging Out

Click **Logout** in the upper right corner of your page view.

### Managing your Password

1. **There are two options to control your password**
  - Once initial login occurs, from the Message Center, click **Change my Profile** under User Maintenance

**Note:** This option will change your password with all of your Paychex Online products; however, an additional step is necessary to update your FSA communications.

A screenshot of a "Change Password" form. At the top, it states: "Your new password must contain: Between 8 and 32 alphanumeric characters. At least 1 number and 1 letter ( no spaces )". Below this are three input fields: "\*Enter your current password:", "\*Enter your new password:", and "\*Enter new password again:". Each field is followed by a series of dots representing masked characters. At the bottom of the form are four buttons: "Change Password" (with a blue icon), "Clear", "Cancel", and "Help".

2. Click **Paychex Benefit Account** from the Message Center to access your FSA plan. From the Profile Option, **Select Login Information**, then **Change Password**.

**Note:** This password is specifically for your FSA account and the mobile application. Initially this will be set to your first initial, last name followed by the last four digits of your SSN. This should be entered as your Current Password unless you have previously changed it for your Mobile device.

From the Navigation link at the top, **select profile**, then **Update Profile**.

Note: Updating information here will only change your FSA password; it will not update any other Paychex products.

### Can't Log In?

Select "Forgot Username, password or image?" and follow the steps to reset or recover your login information.

## Welcome to Paychex Employee Services!

**User Name:**

**Password:**

[Where do I enter my SSN?](#)  
[Forgot username, password or image?](#)

If you are locked out of your account and need further assistance, please contact Paychex Benefit Account Services at **877-244-1771** or email [PaychexBenefitAccount@paychex.com](mailto:PaychexBenefitAccount@paychex.com)



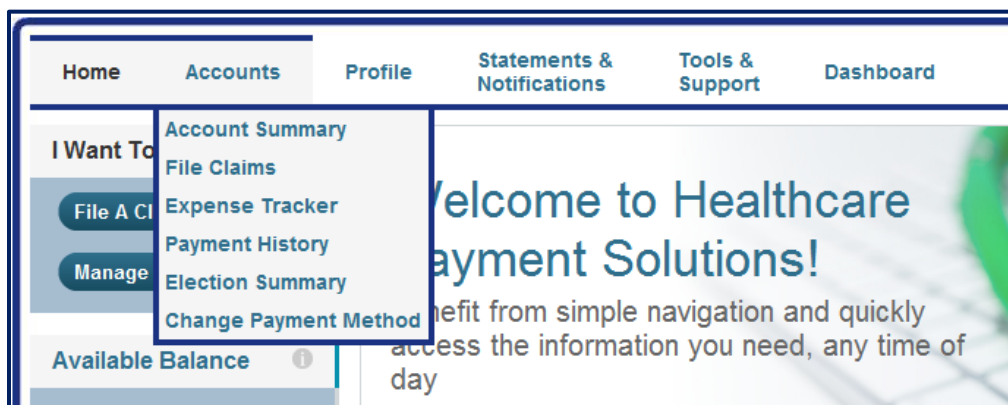
## Welcome Page Overview

The **Home** tab provides an overview of your Paychex Benefit Account. You can view your current plan and available balance, file a claim, view claim history, or view the account summary.



## Accounts Tab

From the **Accounts** tab, you can access Account Summary, File Claims, Expense Tracker, Payment History, Election Summary, Change Payment Method, and Plan Descriptions options.



## Account Summary

The **Eligible Amount** shows the sum of your annual election amount plus any credits that have been applied to your account. The **Available Balance** reflects your available funds.

Home	Accounts	Profile	Statements & Notifications	Tools & Support	Dashboard	I Want to... ▼
Accounts / Account Summary						
The information on the Account Summary Page will display your specific healthcare benefits under your Employer.						
01/01/2015 - 12/31/2015						
Account	Eligible Amount	Submitted Claims	Paid	Pending	Denied	Available Balance
FSA	\$2,500.00	\$25.00	\$5.00	\$0.00	\$20.00	\$2,495.00
Dependent Care	\$750.00	\$27.50	\$27.50	\$0.00	\$0.00	\$197.50

Click the plan you are currently enrolled in to see the rules of the plan. These plan rules include Final Service Date, Status Effective Date, and Final Filing Date.

FSA (1/1/2015 - 12/31/2015)

**Filing Rules:** You must file claims before the final filing date with a service date no later than the final service date determined based on your current status.

Final Service Date: 3/15/2016

Final Filing Date: 3/30/2016

Current Status: ☒ Active

Status Effective Date: ☒ 11/15/1999

**Debit Card Rules:** Your debit card may be used for this plan as follows:

Debit Card Transactions Allowed: Yes Maximum per Transaction Amount: No maximum

### Claim Summary

Submitted	Paid	Pending	Denied	Total Expenses
\$25.00	\$5.00	\$0.00	\$20.00	\$5.00

## Account Activity

Account Activity will show you the specific transaction details on each plan for a specific plan year.

The available links from this screen will allow you to access additional details about the transaction.

### Account Activity

Account: FSA (1/1/2015 - 12/31/2015)

[View](#)

### Activity Details

Date	Description	Amount	Available Balance		Notes
2/23/2015	Adjustment	(\$20.00)	\$2,495.00		
2/23/2015	Adjustment	\$20.00	\$2,515.00		
2/23/2015	<a href="#">Denied Claim</a>	\$20.00	\$2,495.00		
2/17/2015	<a href="#">Claim Submission</a>	(\$5.00)	\$2,475.00		
1/28/2015	<a href="#">Claim Submission</a>	(\$20.00)	\$2,480.00		
1/2/2015	New Election	\$2,500.00	\$2,500.00		

## Claims

In the Claims section, you can view all of the claims against your Paychex Benefit Account. Additional Claim details, and receipt upload options are available by clicking on a specific claim.

[Home](#)[Accounts](#)[Profile](#)[Statements & Notifications](#)[Tools & Support](#)[Dashboard](#)[I Want to...](#)

Account Summary

Account Activity

Claims

Payments

Account

Reset All

All Accounts

01/01/2015 - 12/31/2015

Dependent Care

FSA

Claim Status

All Claim Statuses

Denied

Paid

Receipt Status

All Receipt Statuses

Not Needed

Received

### Accounts / Claims

Date of Service	Account	Merchant/Provider	Claim Status	Amount
02/08/2015	FSA	Todds Pharmacy	Paid	\$5.00
01/10/2015	Dependent Care	-	Paid	\$27.50
01/10/2015	FSA	-	Denied	\$20.00

Date of Service ▼	Account	Merchant/Provider	Claim Status	Amount
02/08/2015	FSA	Todds Pharmacy	Paid	\$5.00

<b>Claim Details</b>	<b>Claim Number:</b> S435SS150217D0000101	<b>Date(s) of Service:</b> 02/08/2015
	<b>Recipient:</b>	<b>Paid:</b> \$5.00
	<b>Payee:</b>	
	<b>Source:</b> Debit Card	
	<b>Receipt Status:</b> Not Needed	
<a href="#">Upload Receipt(s)</a>		<a href="#">View Confirmation</a>

## Payments

In the Payments section, you can see an overview of the payments made from your plan.

Home

Accounts

Profile

Statements & Notifications

Tools & Support

Dashboard

I Want to... ▼

Account Summary

Account Activity

Claims

Payments

Method

Reset All

All Methods

Check

Debit Card

Status

All Statuses

Paid

Void

Date

All Dates

2015

Accounts / Payments

Date ▼	Number	Method	Status	Amount
02/25/2015	0005000008	Check	Paid	\$27.50
02/17/2015	EPCX0012670014	Debit Card	Paid	\$5.00
02/02/2015	0005000001	Check	Void	\$20.00

To see additional details about each payment, you can click the payment transaction.

02/17/2015	EPCX0012670014	Debit Card	Paid	\$5.00
Payment Details	Account: FSA		Date of Service: 02/08/2015	
	Recipient:		Claim Amount: \$5.00	
	Merchant/Provider: Todds Pharmacy		Payment Amount: \$5.00	
	Type: Claim Reimbursement			
	Total Payment Amount: \$5.00			

## How to File a Claim

### Options for Submission of Claims

1. Online – Enter your claim information and upload your documentation on the portal.
2. Manual – Complete the applicable Claim Reimbursement Form for your plan, located on the Forms tab. Return the completed form with supporting documentation to Paychex Benefit Account Services.

### To File a Claim Online

Online filing is a fast and easy way to file claims; select the **File a Claim** from your homepage. When you select **File Claims** you will see the following screen; please enter your claim information:

The screenshot shows a web form titled "File Claim" with a "Claims Basket (0)" button in the top right. The form contains several sections with labels and input fields:

- Account Type:** A dropdown menu with "Medical" selected. Below it is a note: "Select the Account Type that matches the type of expense for which you would like to file a claim."
- Do you have a valid receipt?:** Radio buttons for "No" and "Yes" (selected). A link "What is a valid receipt?" is to the right.
- Receipt:** An "Upload Receipt" button. Below it is a note: "You are required to upload receipts in order to successfully submit your claim."
- Date of Service:** A text input field with a note: "Format date as mm/dd/yyyy."
- Claim Amount:** A text input field with a dollar sign prefix.
- Provider:** A text input field.
- Category:** A dropdown menu with "Choose from list..." selected. A link "What expenses are eligible?" is to the right.
- Type:** A dropdown menu with "Choose from list..." selected.
- Description:** A text area with up/down arrows. Below it is a note: "If the category is 'Other' or 'Over-the-Counter Product' you must provide a description."
- Recipient:** Two radio buttons. A link "Add Dependent" is below them.
- Did You Drive To Receive This Product/Service?:** Radio buttons for "No" (selected) and "Yes" (with a text input field for miles). A link "How is mileage claimed?" is to the right.
- Calculate Total:** A button.
- Mileage Reimbursement:** A label.
- Total Claim Amount:** A label.
- Required field:** A label.
- Add Claim** and **Cancel** buttons.

Once you submit all required information, click **Add Claim**.

The claim information will appear in your Claims Basket. Check that you have read the Terms and Conditions and select **Submit Claim(s)**.

The screenshot shows a web interface titled "Claims Basket" with a sub-header "Claims Basket (1)". Below this is a section titled "Claims" with a link "Add Another Claim". A table lists the claim details:

Account	Expense Details	Claim Amount	Actions
FSA (01/01/2015 - 12/31/2015)	\$100.00 on 3/1/2015	\$103.45	<a href="#">Update</a> <a href="#">Remove</a>
		\$103.45	

Below the table is a "Terms and Conditions" section with a checked box and the text "I have read and agree to the [Terms and Conditions](#)". At the bottom are three buttons: "Submit Claim(s)", "Add Another Claim", and "Cancel".

A Claim Confirmation will appear. You can print your Claim Confirmation Form as a record of your submission.

The screenshot shows a web interface titled "Claim Confirmation". A green banner at the top says "Claim Successfully Submitted" and "You may print your [Claim Confirmation Form](#) as a record of your submission." Below this is a message: "We will process your reimbursement within two business days following the date we receive the required documentation from you." A table follows with the following data:

Account	Claim Details	Receipt Status
FSA (01/01/2015 - 12/31/2015)	\$103.45 on 3/1/2015	<a href="#">Uploaded</a> <a href="#">Upload another Receipt</a>

When your claim is approved, a reimbursement check will be sent to your home by U.S. mail within five business days after we receive the request. If you would like the funds to be directly deposited into a bank account, please see instructions on page 15.

#### Documentation Requirements for Reimbursements

To be successfully reimbursed, please review the following requirements.

The Internal Revenue Service (IRS) requires documentation for medical expenses. This includes a third-party receipt or Explanation of Benefits that includes:

- Date service was received or purchase was made
- Description of service or item purchase
- Provider name
- Cost of product(s)/service (after insurance, if applicable)

The IRS also requires certain documentation for dependent care expenses. This includes a third-party receipt that includes:

- Incurred dates of service
- Dollar amount
- Name of daycare provider

If a receipt is not available, you can ask the daycare provider to sign the Reimbursement Request Form.

**Unacceptable** forms of documentation include:

- Provider statements that only indicate the amount paid, a balance forward, or previous balance
- Credit card receipt
- Copies of cashed checks
- Missing or vague medical practitioner's note
- Bills for prepaid dependent care/medical expenses where services have not yet occurred

When submitting a receipt for a co-payment amount, please be sure the co-payment description is on the receipt. In some cases, you will need to ask for a receipt at the point of service. If 'co-payment' is not clearly identified, have the provider write 'co-payment' on the receipt and sign it.

#### **Documentation Reminder Process:**

If Paychex Benefit Account Services needs additional documentation for manual/online claims:

- You will receive a denial that explains why Paychex could not process the claim. If you have the necessary documentation identified in the denial notification, you can provide it to Paychex Benefit Account Services.
- In the event of multiple reasons for denial, you will be prompted to call the Paychex Benefit Account Services team for further explanation and assistance.

#### **Change Payment Method**

The Change Payment Method option is used to change your reimbursement method from check to direct deposit. If you would like reimbursements to be sent by direct deposit, you are required to add banking information.

**Change Payment Method for 01/01/2013-12/31/2013**

Select the method in which you would like to receive reimbursements for the following plan(s): Health Reimbursement Arrangement 01/01/2013-12/31/2013.

\*Reimbursement Method: ☒ **Direct Deposit**  
Reimbursement amounts will be deposited to your designated bank account within 3-4 business days after the request. Bank account information can be added on the Consumer Portal.

☐ **Check**  
Reimbursement checks will be sent to your home via U.S. Mail 3-5 business days after the request.

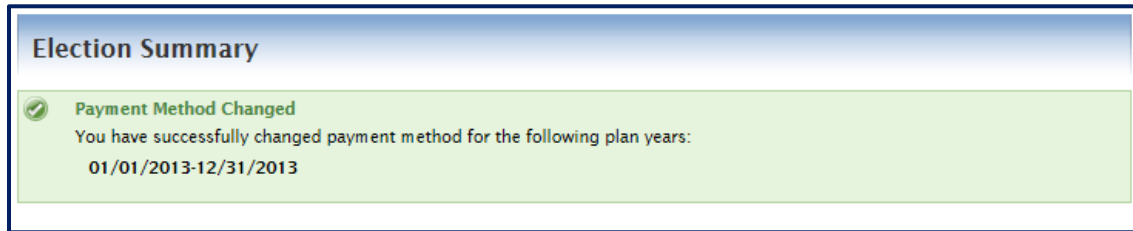
\* Required field

[Change Payment Method](#) | [Cancel](#)

Bank account information will be requested when you change the reimbursement method. You will need the following information to complete this step:

- Routing Number and Account Number
- Account Type
- Account Nickname
- Bank Name and Address

Once you successfully enter your banking information, reimbursements will automatically be sent to your bank account.

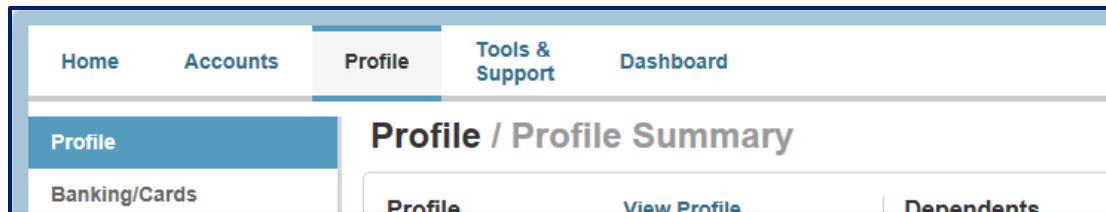


### Profile Tab

You may review and update your personal profile and banking information here.

### Profile

The Profile link shows your demographic and account detail, including employee number, address, and dependents.





## Banking

If you would like to have reimbursements or distributions sent directly to your personal checking or savings account, please add your banking information in the Profile tab.

**Banking / Add Bank Account**

**Bank Account Information**

Routing Number \* ⓘ

Account Number \*

Confirm Account Number \*

Account Type \*  
Checking ▾

Account Nickname \* ⓘ

**Bank Institution Information**

Bank Name \*

Bank Address \*  
Address Line 1  
City  
Select a state... ▾ Zip Code

\*Required

Cancel

Submit

Refer to the Change Payment Method section for information about updating your reimbursement method to direct deposit.

## Mobile Access

Access your account anytime, anywhere! Through the Mobile Access link, you can check your balance and manage your account on the go with the new apps for iPhone, iPod Touch, and Android mobile devices. Please follow these steps to successfully and securely access your account at your convenience.

**PAYCHEX<sup>®</sup> ONLINE**

HOME

ACCOUNTS

PROFILE

TOOLS & SUPPORT

DASHBOARD

Last Login: 7/3/2014 - Online | [Logout](#)

**Mobile Access**

Access your account anytime, anywhere. Easily check your balances and manage your account on the go with the new apps for the iPhone & iPod touch and Android mobile devices.

Check available balances 24/7  
View important alerts about deadlines affecting your account  
Easy, secure login

[Get the iPhone & iPod touch App](#)

[Get the Android App](#)

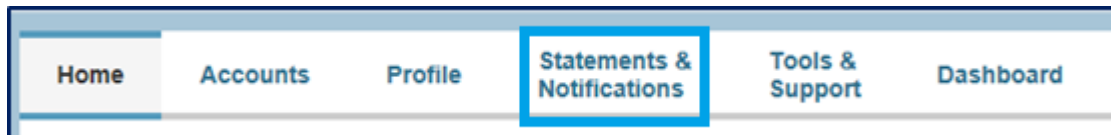
[Set Up Text Alerts](#)

Step 1: Install the app.  
Step 2: Log in with your standard username and password.  
Step 3: Access your account anywhere.

**Your information is secure**  
We prevent unauthorized access by utilizing 128-bit SSL on all mobile transmissions. No sensitive account information is ever stored on your phone.

### Statements & Notifications Tab

You will receive various statements and notifications related to your Paychex Benefit Account. These can be accessed by clicking the Statement & Notifications tab.



### Tools & Support Tab

The **Tools & Support** tab provides access to Reimbursement Request Forms, as well as frequently asked questions.

