

# PayFlex Mobile™

## Quick Reference Guide

### Don't go another day without our mobile app

Get access to your PayFlex® account with our free\* PayFlex Mobile application. This app makes it easy for you to manage your account virtually 24/7. It's available for iPhone® and iPad® mobile digital devices, as well as Android™ and BlackBerry® smartphones.

### Getting started is easy

If you are an Aetna member, log in to your Aetna Navigator® secure member website at [www.aetn navigator.com](http://www.aetn navigator.com).

- Click on **Access Your Account** to get to the PayFlex website.
- Click on **PayFlex Mobile** to register and create a user name and password. Then follow the steps below.

Otherwise, go directly to **PayFlexDirect.com**. If you already have a PayFlex user name and password, skip to step 1. If not, click on **Employee Account Login**. Click on **Register Now** to get started.

1. From your mobile app store, download PayFlex Mobile.
2. To log in to the app, enter your user name and password. Select **Login**.

After you log in to the app, you'll see **My Dashboard**. This connects you to:

- Financial Center
- Benefits Center (if applicable)
- My Resources
- Alerts
- Contact Us

**Note:** Not all of the PayFlex Mobile functionality is available for BlackBerry smartphones. Menu layout, designs and screen displays may vary on your device.

### Using the mobile app features

#### Financial Center

You can view your account information and request reimbursement for your out-of-pocket expenses.

#### View account information:

To get started, select the account you wish to view.

- If you have a **reimbursement account**, you can:
  - **View all of your transactions in one list.** Select **Claims** or **Deposits** to narrow your view.
  - **View the details of your transactions.** Select the transaction you wish to view.
  - **View a summary of your account.** On the Details page, select the account to view a summary.
- If you have a **health savings account (HSA)**, you can:
  - Use the **Make a Deposit** feature to contribute funds to your HSA.
  - Use the **Make a Withdrawal** feature to request reimbursement for your out-of-pocket expenses.
  - Use the **Make a Payment** feature to pay your health care provider directly for the amount you owe.
  - **View all of your transactions in one list.**
  - **View the details of your transactions.** Select the transaction you wish to view.
  - **View a summary of your account.** On the Details page, select the account to view a summary.

\*Standard text messaging and other rates from your wireless carrier still apply.



## Submit a claim for reimbursement

This is available if you have a reimbursement account. This option does not apply to the HSA. To get reimbursed through your HSA, you must use the **Make a Withdrawal** feature.

- From the Financial Center, select **File a Claim**.
- Select your employer (if applicable) and your expense type.
- In the **Expense Start Date** field, enter the date of service or purchase.
- Enter the amount that you paid for the product or service. For a dependent care expense, enter the expense end date and your dependent's name.
- To attach a document, select the **Add Photo** image. Then select **Review Claim**.
- After you review your claim, select **Submit**. If you need to make a change, select **Cancel**.
- Select **I Agree** to submit your claim. Select **Go Back** to make a change.

Don't have a phone with a camera? Complete the claims submission process online.

### Benefits Center

If offered by your employer, this center features your benefits information and the contact details for your health plan and primary physician.

- You have to enter this information on **PayFlexDirect.com** to view it on the app.
- If you want to add information or make changes, log in to **PayFlexDirect.com**. From there, click on the **Benefits Center** tab.

### My Resources

You can view a list of common eligible expenses. You can also view any agreements and terms of use that we have sent to you.

- Select **Expenses** and choose the expense list you wish to view.
- Select **Documents Center** and select the document you wish to view.

## Alerts

If you see an alert, select it to view more details. Here are two alerts you may see on the mobile app.

### Alert: Claims requiring substantiation

You may see this if your employer offers the PayFlex Card®, your account debit card. This red alert message will let you know if we need documentation for a debit card purchase.

**Note:** This does not apply to HSAs.

- To take action, select **Learn More**.
- You can upload your documentation on the app. Select the **Add Photo** image. **Note:** This photo button will only appear on phones that have a camera or photo library.
- Take a photo of your documentation or choose the image from your photo library. Make sure your photo clearly shows the date of service, the amount of purchase, a description of the product or service, the name of the merchant or provider and, if applicable, the name of the patient.
- If the photo is not clear, select **Cancel**.
- If the photo is clear and readable, select **Choose**.

### Alert: Claims payments

After you submit a claim, you'll see an alert message confirming the amount and when you can expect reimbursement. This will show after we process your claim and have approved it for payment. Simply select the alert to view the details. **Note:** This does not apply to HSAs.

## Contact Us

You have a number of ways to contact us. Through the app, you can view our toll-free customer service number, fax number and mailing address; our customer service hours; and the member website. If you're having issues downloading the app, contact your smartphone carrier.

## Questions?

Call us at **1-888-678-8242**. Customer service representatives are available Monday – Friday from 7 a.m. – 7 p.m. CT and Saturday from 9 a.m. – 2 p.m. CT.

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