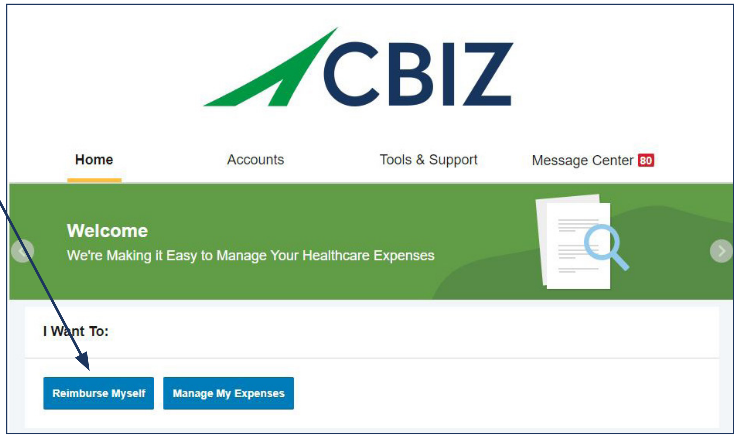
MY PLANS BY CBIZ

Claims Filing

SEAMLESSLY FILE CLAIMS AND SUBMIT RECEIPTS

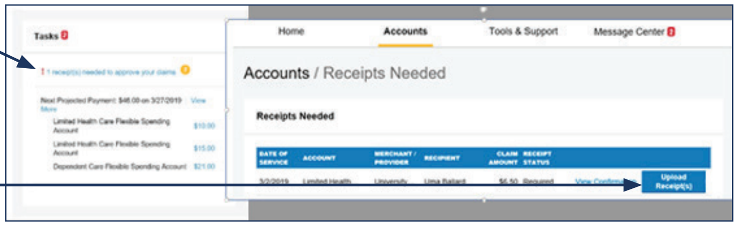
SIMPLE STEPS TO FILE A CLAIM

- Log into your ***My Plans by CBIZ*** account online at myplans.cbiz.com or through the mobile app.
- From the **Home Page**, click on **Reimburse Myself** under the **I Want To:** section.
- The claim filing wizard will load and walk you through the entire process.
- If you have additional claims, click **Add Another** from the **Transaction Summary** page before you proceed to the last step.
- When all of your claims appear in the **Transaction Summary**, agree to the terms and conditions and click **Submit** to send your claims for processing.
- The **Claim Confirmation** page will display, and you can print the **Claim Confirmation Form** as a record of your submission.



UPLOAD REQUESTED RECEIPTS

- If you see a **Receipts Needed** link in the **Tasks** section on your **Home Page**, click on it. You will be taken to the **Claims** page where you can see the claims that require documentation. You can easily upload the needed receipts from this page by clicking to expand the line item to view claim details and the **Upload Receipt(s)** button.
- Your receipt must include date of service, type of service, provider information, and participant's responsibility.



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cbizflex@cbiz.com | 855-410-2249 | CBIZ Flexible Benefits