How To
File A Claim

File claims on the mobile app or online. It's easy and you will receive the fastest service and reimbursement of your claims.

Whichever method you use to submit our claim, make sure you include an EOB, itemized bill, receipt, or invoice that shows the following details:

- Date of service (must be during the plan year)
- Provider's name
- Name of person receiving the service
- Amount you must pay after insurance has paid their portion
- Description of service or product purchased

If you don't have an itemized receipt, contact the provider or your insurance company and request an EOB or a copy of the receipt.

Submit a Claim Using the Chard Snyder Mobile App

Submit your claim using your device of choice.

1. **Log in** to your Chard Snyder account using the mobile app
2. **Choose** *Reimburse Myself* under the *I Want To* section
3. **Enter** requested details regarding the claim
4. **Click** *Upload Receipt*. (Device camera will take a picture of your receipt. Make sure the picture is clear and the writing is legible.)
5. **Click** the *Submit* button

Submit a Claim Online

Save time by filing your claim online.

1. **Log in** to your Chard Snyder online account
2. **Click** on *File Claim/Reimburse Self* in the *I Want To* section or click on the *Accounts* tab and choose *File Claim/Reimburse Self* from the drop-down menu.
3. **Choose** the account that you would like to use and where you would like payment to go (to yourself via check or an account you have set up for direct deposit). **Click** *Next* to continue.
4. **Click** *Upload Valid Documentation* to attach your receipt(s) to your claim. You may upload up to 4 documents that are 8MB or smaller. They can be JPG, JPEG, GIF, PNG or PDF format. If you need to send additional documentation, please fax or mail using the information listed below. Be sure to upload the correct receipt file, as attaching the wrong file will delay your payment. **Click** *Next* to continue.
5. **Enter** requested details regarding the claim. **Click** *Next* to continue.
6. **Review** details of the claim
7. **Read** *Terms & Conditions* then click that you have done so
8. **Click** *Save for later, Add Another or Submit*

After you click *Submit*, a confirmation screen will show a list of all claims that you just submitted.

The Chard Snyder **Mobile App**

Manage your plan on the go, anywhere, anytime

Features

- Submit claims with receipt images using your phone's camera
- View account balances and transaction details
- Enable Face ID or Touch ID for easy, secure access
- Catalog past and current receipts using your phone's camera
- Scan any product for eligibility using your phone's camera *(Plan restrictions may apply)*

Download from the App Store or Google Play

Available on the App Store

GET IT ON Google Play

www.chard-snyder.com

Chard Snyder helps you get the most out of your plan.

Submit a Paper Claim Form

If you are submitting a paper claim for services you have received or purchases you have made, follow the steps below.

1. **Complete** the claim form available under *Tools & Support* in the Chard Snyder portal
2. **Make** a copy of your completed claim form and send it with a copy of your receipt or EOB
3. **Fax:** 513-459-9947 or 888-245-8452
4. **Mail:** Chard Snyder, P.O. Box 2924, Fargo, ND 58108-2924

When Your Reimbursement Should Arrive

Your check will arrive based on your employer's payment schedule, usually within about two weeks.

If you request reimbursement by check and your approved payment is less than $25, we will wait to send reimbursement until we receive additional claims that make your total reimbursement amount at least $25. If we don't receive any additional claims, we will send your reimbursement at the end of your plan's runout period. There is no minimum amount required for reimbursement by direct deposit.

Sign Up for Direct Deposit for Fastest Repayment

You may choose to have your reimbursement deposited directly into your personal bank account when you submit a claim for reimbursement:

1. **Log** in to your Chard Snyder online account
2. **Select** the *Tools & Support* tab
3. **Under** the *How Do I?* section, select *Change Payment Method*
4. **Under** *Current Payment Method,* select *Update*
5. **Select** *Direct Deposit* under *Alternate Payment Method* and *Submit*
6. If you have not previously added your bank account information, the *Add Bank Account Page* will display. Enter your information and *Submit*.

Chard Snyder Website

www.chard-snyder.com

Once you've enrolled, access your Chard Snyder online account from the website home page by clicking on the blue *Login* tab at the top right of the page.

Chard Snyder Participant Services

Our Participant Services team is here to help answer questions you may have about your plan.

CHARDSNYDER™
a WEX™ company

800.982.7715 www.chard-snyder.com

The information contained in this publication is not, nor is it intended to be, legal or tax advice. Federal regulations may change plan features without notice at any time. ©2024, Chard Snyder & Associates, LLC. All rights reserved.