



Steps for Filing a Flexible Spending Account (FSA) Claim

1. Log into www.optumbank.com
2. Click on **File a Claim** from the **I want to...** menu
3. Select Reimbursement from the **Expense Type** and then the appropriate account from **Account to reimburse from**
4. Enter the amount of the expense in **Expense amount**
5. Select either the full amount of the expense to reimburse or enter another amount in **Amount to reimburse now**
6. Select "None" in **Provider** and click **Continue**
7. Enter the appropriate service dates in **Dates of Service** and select the appropriate category in **Expense Category**
8. Select "Me (customer name)" in **Patient/Recipient**
9. Enter the merchant name and patient/dependent in **Description** and click **Continue**
10. Review for accuracy; click **Upload from your computer** under **Receipts** to enter the receipt
11. Enter your First and Last Name in the **Digital signature** fields and click **Submit**

Any receipt substantiation requests should be sent via email optumclaims@prod.sourcehov.com or fax at 855-244-5016. It should include the receipt and the receipt request sent to the employee.



Questions? Contact Customer Service at 1-800-243-5543.