

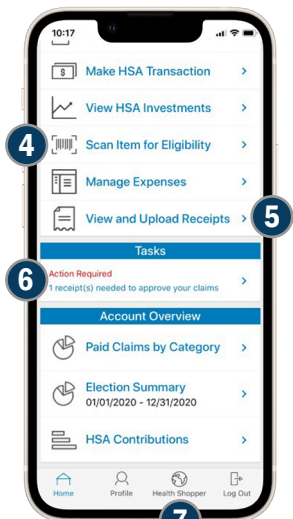
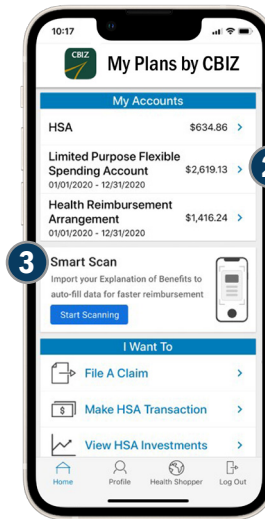
# My Plans by CBIZ

## MOBILE APP GUIDE

Secure, around-the-clock information right at your fingertips, allowing you to manage your account on the go.

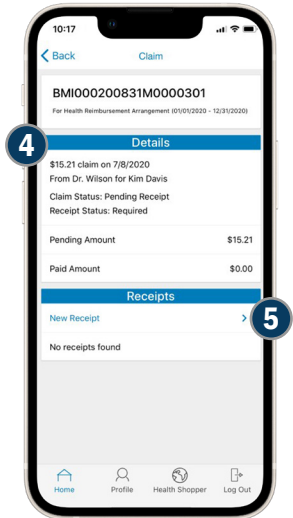
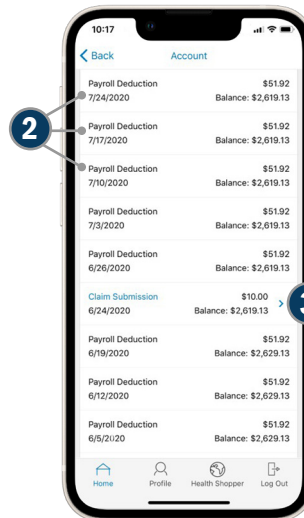
### Getting Started

1. Open the *My Plans by CBIZ* mobile app (download in the Apple App Store or Google Play Store) and sign in with your username and password
2. Quickly view available balances and access account details by tapping the arrow > beside the appropriate account
3. Access the **Smart Scan** feature to take a photo of your Explanation of Benefits and start a new claim
4. Scan the bar code of an over-the-counter item to determine if it is an eligible expense
5. Take or upload a picture of a receipt and submit for a new or existing claim
6. View in-app messages and text alerts that provide instant notifications
7. Shop for eligible items using **Health Shopper**



### Account Details

1. Easily view account details by selecting the account from the **Home** screen (See 2 under Getting Started)
2. View payroll deductions
3. Access details of a claim by tapping > beside the claim
4. Details include provider information, claim number, and date of the claim
5. Easily add a receipt to a claim by tapping > in the **Receipts** section
6. A new screen will appear allowing you to choose how you would like to upload your receipt

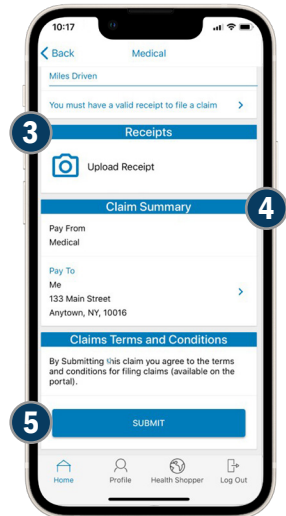
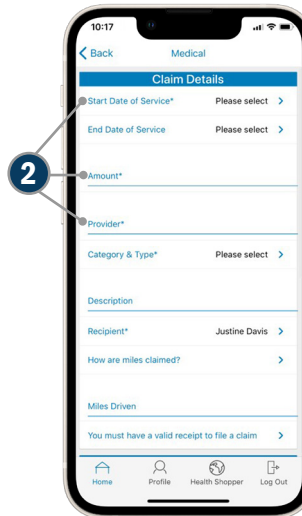


CBIZ Human Capital Management

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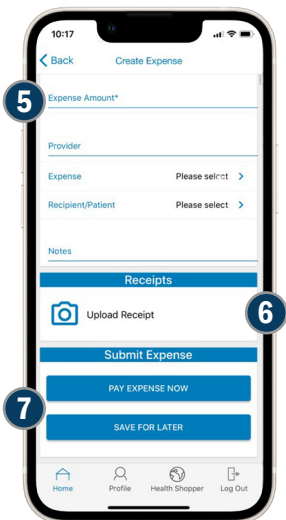
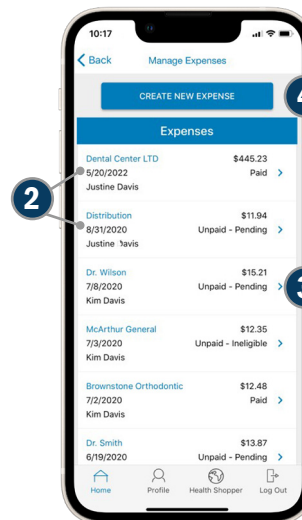
## File a Claim

1. From the **Home** screen, tap **File A Claim**
2. Enter claim details (Sections marked with an asterisk\* are required)
3. Upload a receipt from photos already stored on your device or take a photo of the receipt
4. Once all the information is entered and the receipt is uploaded, the information will display in the **Claim Summary**
5. Tap **SUBMIT** to file the claim



## Manage Expenses

1. From the **Home** screen, tap **Manage Expenses**
2. A quick view of expenses will appear on the screen, including the expense amount and status
3. See more details of each expense by tapping > for the selected expense
4. Easily add a new expense by tapping **Create New Expense**
5. Enter expense details (Sections marked with an asterisk\* are required)
6. Upload receipt(s)
7. Choose to **Pay Expense Now** or **Save For Later**



## Other Features

1. From the **Home** screen, tap **Paid Claims by Category** to view a snap shot of your claims

