Select the “I Want to…” Menu and click on Set up Recurring Claim
Claim Schedules Page

Claim Schedules

You may quickly and easily set up claims to be automatically created on a schedule, saving you time on your recurring claims. Or, use the feature to schedule a claim for a one-time future payment.

Claims may be set according to the following schedules: one time, monthly, on the day of your choice, the 1st and 15th of every month, weekly, or biweekly. Once a claim schedule is set up, claims will be automatically created according to the schedule you selected.

Claims that do not require documentation will pay out automatically according to your payment preferences. Claims that require documentation will be automatically created, but will not be processed until documentation is submitted.

You may view, delete and create new claims schedules at any time.

ACTIVE SCHEDULES

<table>
<thead>
<tr>
<th>Vendor/Provider</th>
<th>Next Claim Create Date</th>
<th>Service For</th>
<th>Service Type</th>
<th>Claim Amount</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
</table>

You do not have any claims scheduled. Click "Create a Claim Schedule" to schedule any future one-time or recurring claims.
Create a Claim Schedule (Page 1)

1. Enter the Claim Amount
2. Ensure the Correct Member is Selected
3. Select the Service Type: Health Insurance Premiums
4. Enter the Vendor/Provider
5. Enter an optional Service Description
6. Enter frequency of recurring claim to monthly
7. Enter day of month for payment, start and end date
8. Click Continue
Scheduled Claim Verification Page

Verify All of the Claim Information

1

Acknowledge the IRS Compliance Information

2

Click Save

3
Scheduled Claim Verification Page

Create a Claim Schedule

Review Schedule Details
- **Claim Amount**: $50.00
- **Service For**: Timothy
- **Service Type**: Acupuncture
- **Vendor/Provider**: John’s Acupuncture
- **Description**: Pay To: Timothy
- **Frequenty**: Recurring
- **Period**: 03/01/2017 - 12/31/2017
- **Create On**: Monthly on the 1st

Future Claim Dates
- 03/01/2017
- 04/01/2017
- 05/01/2017
- 06/01/2017
- 07/01/2017

Acknowledgement
I certify that when I submit this claim, these expenses have been incurred by me or another person eligible under my plan. I understand that if documents are not received in compliance with IRS requirements, that payment will not be processed until sufficient documentation is received.

Select “Save”
Scheduled Claim Confirmation Page

Success! Claim Payment Schedule Has Been Created.

1. Details  2. Review  3. Confirmation

I want to...
- View Schedule Details
- Go to Schedule Claims
- Update Email Address