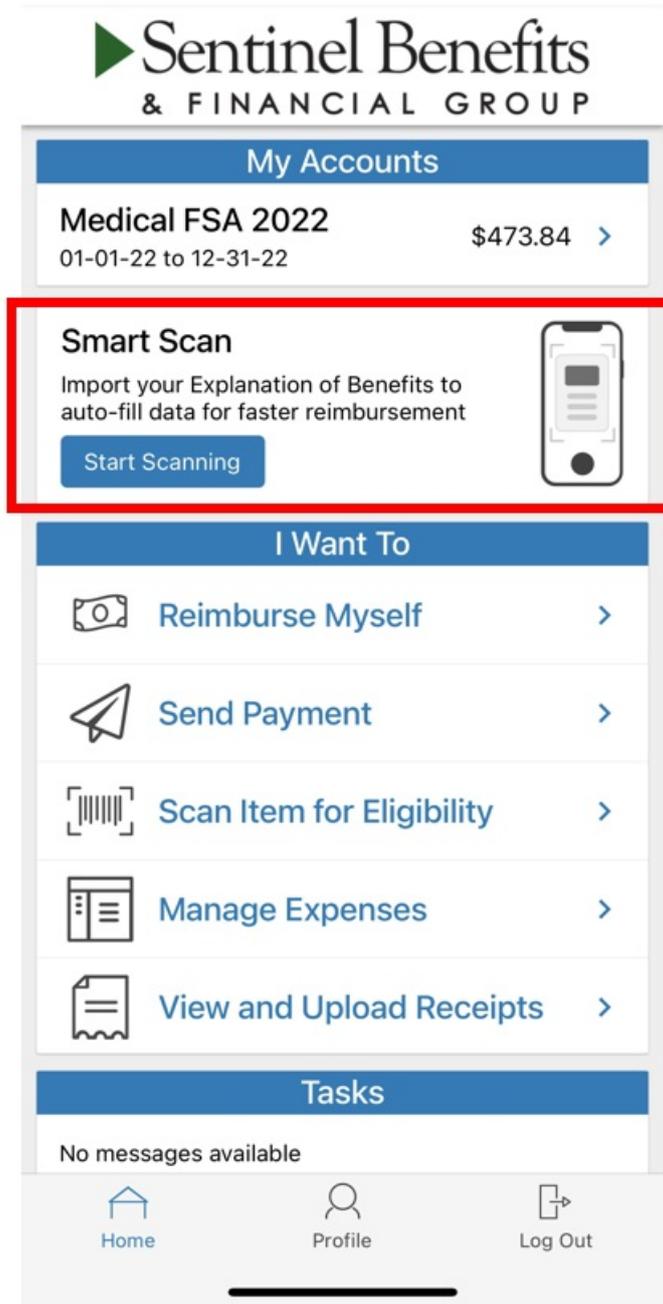


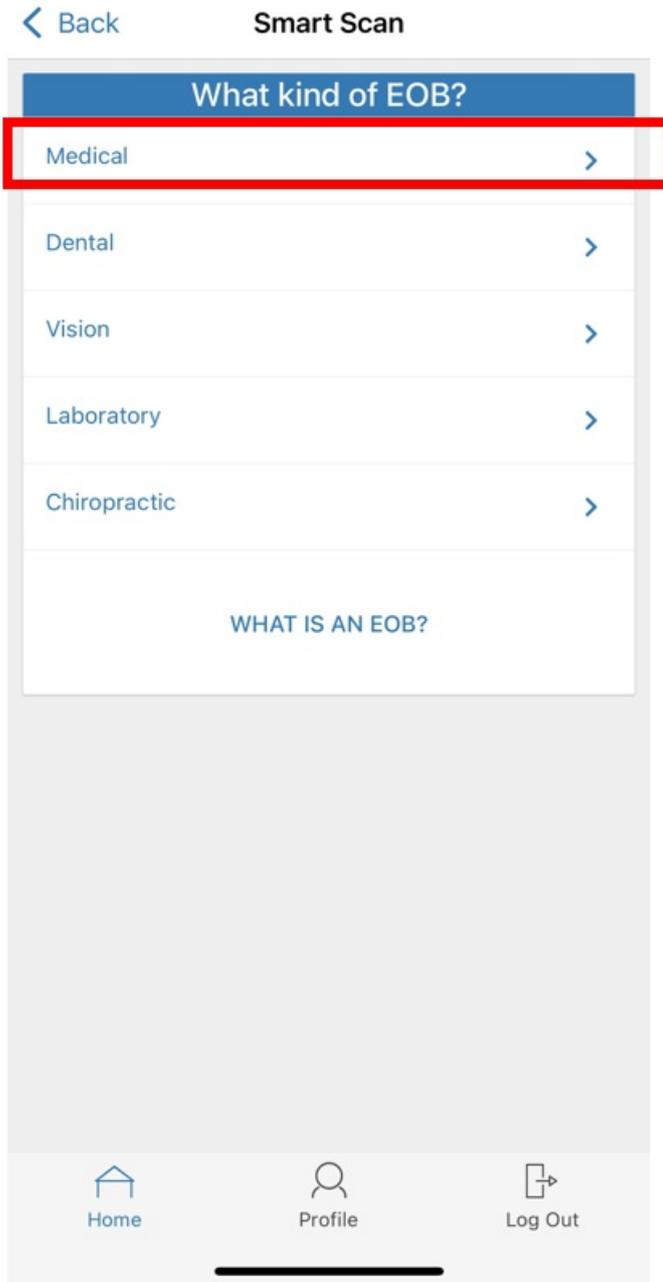
# Submitting a Claim- Smart Scan

Smart Scan makes it easy to scan an EOB right from the mobile app and autofill expense details. It is conveniently located on the home page of the **mobile app**.

1. To begin simply click 'Start Scanning'.



2. Select the type of EOB to scan. (For our example we selected Medical).



3. Select the insurance provider.

< Back

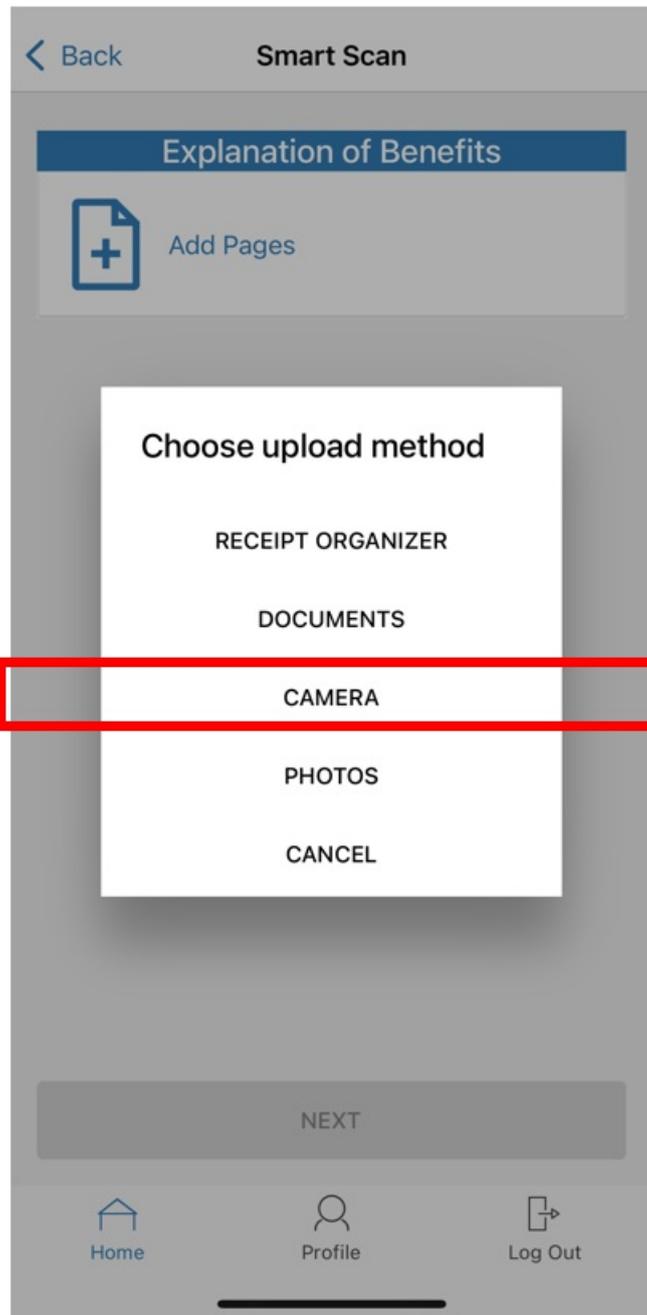
Smart Scan

Which insurance carrier is it from?

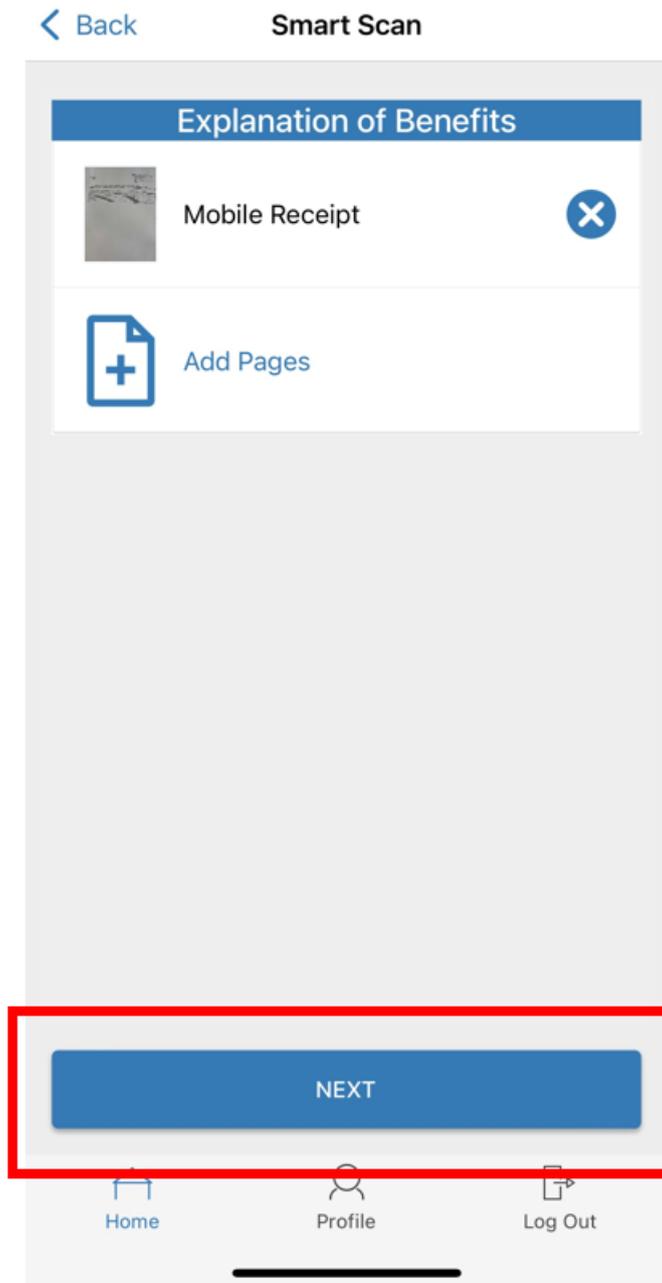
Aetna	>
Blue Cross Blue Shield of Alabama	>
Blue Cross Blue Shield of Illinois	>
Blue Cross Blue Shield of Kansas	>
Blue Cross Blue Shield of Massachusetts	>
Blue Cross Blue Shield of Michigan	>
Blue Cross Blue Shield Of Minnesota	>
Blue Cross Blue Shield of North Dakota	>
Blue Cross Blue Shield of Oklahoma	>
Blue Cross Blue Shield Of Tennessee	>
Blue Cross Blue Shield of Texas	>
Care First Blue Cross Blue Shield	>
Cigna	>

Home Profile Log Out

4. Select 'Add Pages' then choose upload method. (For our example we are using the phone camera).



5. After adding your documentation, you will have the option to upload additional pages using the 'Add Pages' option or if you have all documentation needed you can select 'Next'.



6. The system will read your document and autofill claim details. You will have the ability to review the auto filled information, make changes and add notes if needed before submitting your expense. Scroll through the details until you have two options for submission:

- Pay Expense Now: This will create a claim that you can elect to pay from your desired plan.
- Save for Later: This will save your expense in your **expense tracker**. You will need to go in during your plan year and select 'Pay" to have the claim submitted for adjudication. (This option is most often utilized by our HSA participants who want to keep their funds invested longer in the market).

[< Back](#)

## Create Expense

### Details

Description\*

EOB

**Required**

Date of Service\*

11/15/22



Total Billed Amount

\$500.00

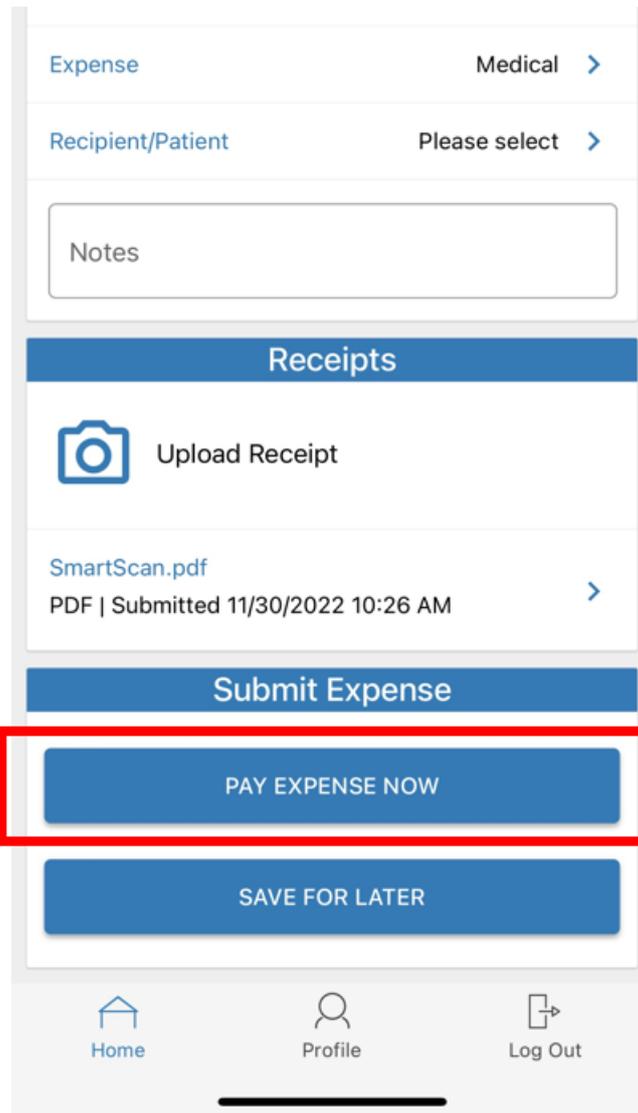
The total amount billed before insurance and provider discount deductions.

Expense Amount\*

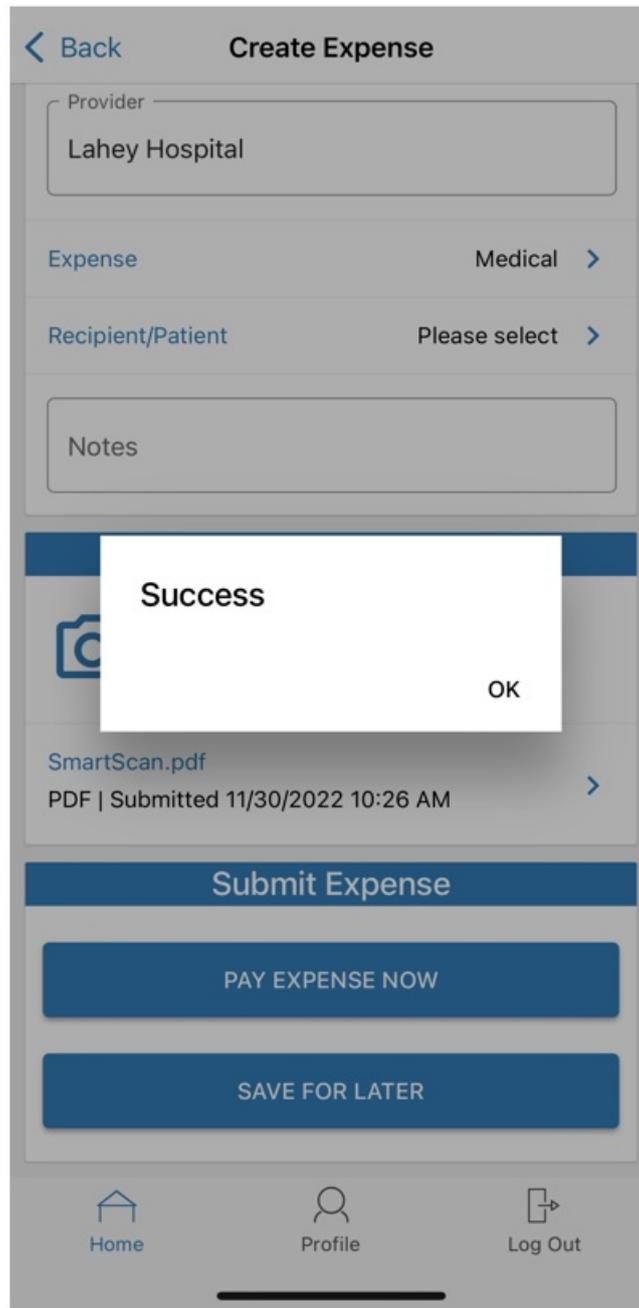
\$200.00

Provider

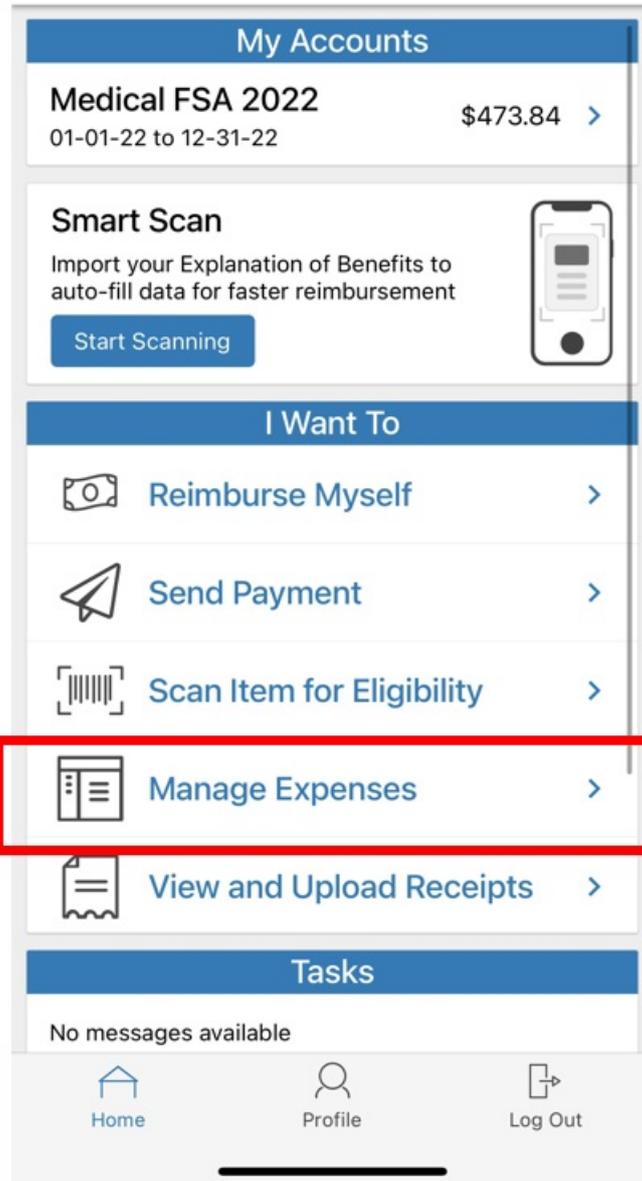
Lahey Hospital



7. Once your claim is successfully submitted you will receive a 'Success' message.



8. Now you would need to navigate back to your home screen and select 'Manage Expenses' to submit the claim for review.



9. Next select the claim you want to submit for payment.

< Back

## Manage Expenses

CREATE NEW EXPENSE

### Expenses

Lahey Hospital	\$200.00
11/15/2022	Unpaid >
	PAYABLE

ORTHODONTICS BY DESIGN	\$166.67
11/2/2022	Paid >

ORTHODONTICS BY DESIGN	\$166.67
10/3/2022	Paid >

ORTHODONTICS BY DESIGN	\$166.67
9/1/2022	Paid >

ORTHODONTICS BY DESIGN	\$166.67
8/2/2022	Paid >

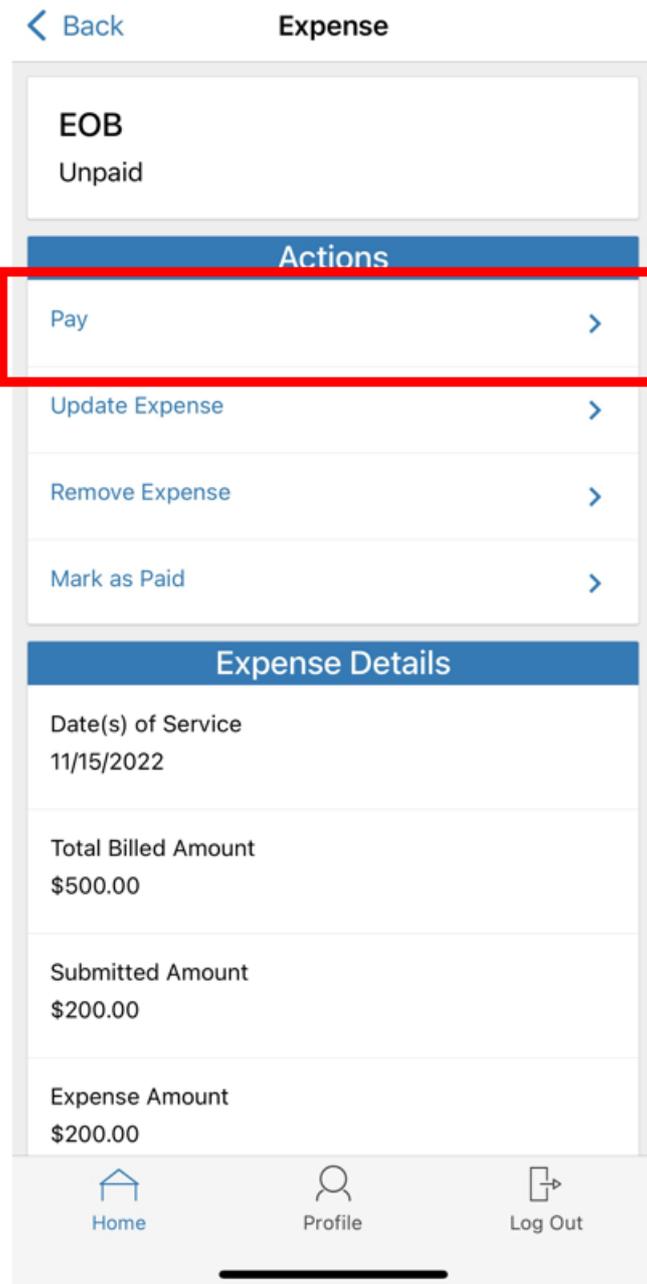
ORTHODONTICS BY DESIGN	\$166.67
7/5/2022	Paid >

Home

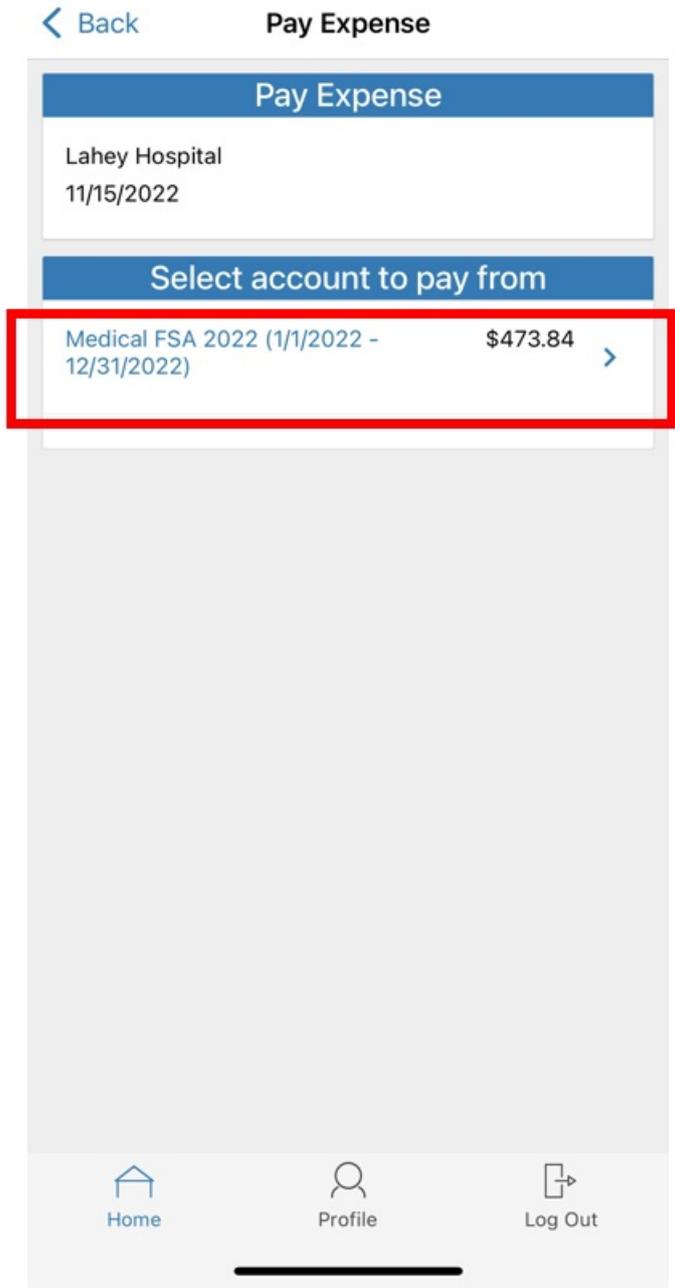
Profile

Log Out

10. Select 'Pay'.



11. Select the benefit account you would like reimbursement from.



12. Select who should be reimbursed for this expense. (In this example we selected 'me' but we could 'add a new payee' if we wanted to send payment to a provider directly.

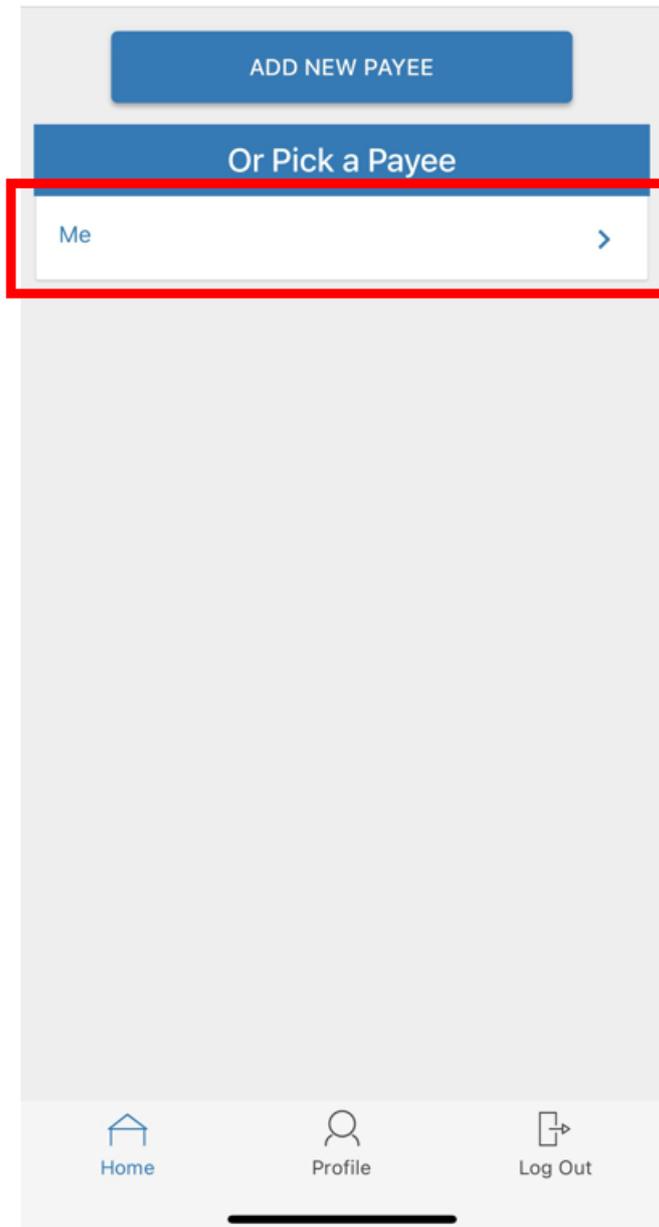
< Back Medical FSA 2022 (1/1/2022 - 12/31...

ADD NEW PAYEE

Or Pick a Payee

Me >

Home Profile Log Out



13. There is a final page to review all the claim details. Once all fields are completed, select 'Submit'.

[Back](#)

## New Claim

### Claim Details

Start Date of Service\* 11/15/22 >

End Date of Service Please select >

Amount\*  
\$200.00

Provider\*  
Lahey Hospital

Category & Type\* Please select >

Description  
Incurred on 11/15/2022 at Lahey Hospital

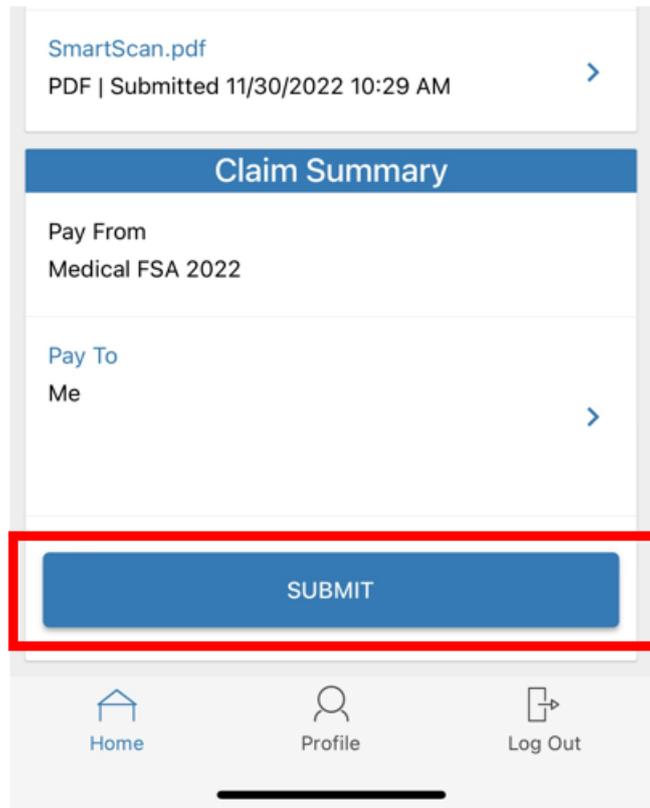
Recipient\* >

You must have a valid receipt to file a claim >

### Receipts



Upload Receipt



14. Select 'OK'. You will see the claim deducted from your available balance. The claim will be sent to the adjudication team for review.

## Claim Submitted



Your claim has been successfully filed.

### Medical FSA 2022

Amount	\$200.00
Approved Amount	\$200.00

### Claim Summary

Total Approved Amount	\$200.00
-----------------------	----------

OK

  
Home

  
Profile

  
Log Out