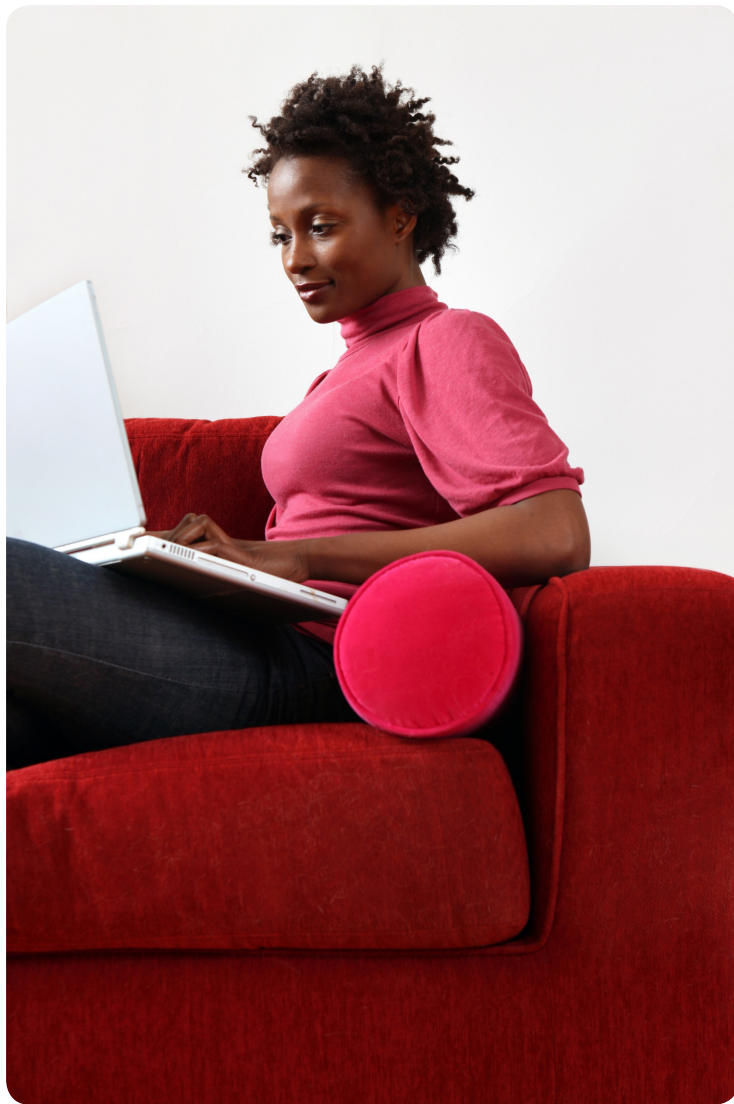


Texas.payflex.com Quick Reference Guide

Take advantage of all the online features and tools available to you on the TexFlex website. This guide will help you easily manage your account online.

Get started

Visit www.texas.payflex.com to access and manage your account. Use your username and password to log in to the site.



If you're a new user, you will have to register first.

- Click on **Register Now**.
- Enter your Member ID. This is your Social Security number without dashes or spaces. Also enter your home ZIP code.
- Click **Register**.
- Create a username and password. Re-enter your password to confirm.
- Select a security question and answer.
- Enter your e-mail address.

View your account balance, deposits & payments

- Click on the **Financial Center** tab.
- From the drop down menu, select the account you wish to view.
- On the account overview page, you will see the following:
 - Annual election
 - Deposits year-to-date
 - Claims submitted, paid and denied
 - Available balance
 - Deadline to submit claims
 - Five most recent claims
 - Five most recent payments or deposits
- To view all of your claims, select **Claims**.
- To view all of your payments and deposits, select **Transactions**.

Account alerts

- On **My Dashboard** you can view your account alerts, if applicable. These messages can tell you:
 - Your card status.
Note: You will only see an alert if your card is suspended.
 - If you need to provide documentation for card purchases.
Note: The alert will show that you have "claims requiring substantiation." To respond to the request for documentation, click on **Learn More**.
 - The date and amount of your next claim payment.
- You can sign up for other web alerts through **My Settings**.

TEXFLEX

ERS
EMPLOYEES' RETIREMENT
SYSTEM OF TEXAS

How to file a claim

- After you log in to the TexFlex site, under *Quick Links* click on **File a Claim**.
- Enter your claim information. To add additional claims, select **Add Another Claim**.
- Once you enter in all of your claims, click **Next**.
- Confirm all expense details, and click **Next**. To make changes, click **Previous**.
- Select **Fax** or **Upload**.
 - To "Fax," click on **Create Coversheet**. Print and sign the form. Fax it with your documentation to the number on the coversheet. When you sign the fax coversheet, you are certifying that your claim is for an eligible expense.
 - To "Upload," use the **Browse** button. Select your documentation from your computer.

Note: This must be in PDF format.

- To add additional documents, click on **Add Additional Document**.
- Check the signature box at the bottom of the page to sign your claim and confirm that your submission is for eligible expenses.
- Click **Submit**.

Note: To find out when your claim has been processed, sign up for the "Explanation of Payment" notification through **My Settings**.



Sign up for electronic account updates

To help you stay up to date on your account, we encourage you to sign up for notifications. You can receive these through e-mail, on the web or both.

- From **My Dashboard**, select **My Settings**.
- Select **Notifications/Email Address**.
- Enter your e-mail address.
- Select the notifications you wish to receive. Then click **Submit**.

For fast reimbursements, enroll in direct deposit

- From **My Dashboard**, on the left side of the screen select **My Accounts and Services**.
- Select **Enroll in Direct Deposit**.
- Select your bank account type. Add your account number, routing number and bank name. Then click **Next**.
- Review your account information.
- If the information is correct, click **Confirm**. If you need to make a change, click **Previous**.
- Once you confirm your account information, a confirmation message will appear.

Questions?

At www.texas.payflex.com, you can view a list of frequently asked questions. You can also call Customer Service toll-free at (866) 353-9839, 7am - 7pm, Monday - Friday and Saturday, 9am - 2pm CT.

Order additional TexFlex debit cards

If you elected to use the TexFlex debit card, a one-time fee of \$15 was taken out of your TexFlex account at the beginning of the plan year. At www.texas.payflex.com, you can order additional cards for your spouse or dependent at no cost.

- From **My Dashboard**, under *Quick Links* select **Manage My Debit Card(s)**.
- You will see the status of your card. You will also see the names of who has a card on your account. And the account(s) that the card is connected to.
- If you would like to order an additional debit card for a dependent or spouse, select **Order A Dependent Debit Card**.
- Enter the first and last name of your dependent or spouse. Then click **Submit**.
- Your card will arrive within 15 business days.

If your card is lost or stolen, call us immediately at **(866) 353-9839** (toll free). Do not order another card online.