

Online Claim Filing and Secure Receipt Upload Instructions

Online Claim Filing with Secure Receipt Upload is a fast and easy way to access your account balance. Before you begin, be sure to have the valid receipt(s) for your expenses handy. If you have your receipts saved on your computer, you can save yourself a trip to the fax machine by using the online Secure Receipt Upload to submit them electronically. We accept most electronic form of documentation as long as it is legible for our claims processing department; this includes EOB's downloaded from your insurance provider's website, scanned images and pictures of receipts taken with your camera. If you only have paper copies of your receipts, you can still file your claims online, and then send your receipts via eFax or email to Genesis. All inbound faxes are received electronically and are directly routed to our secure claims processing warehouse system; this maintains the paperless "Green" approach to the administration of your FSA plan!

Online Claim Filing

1. Login

Visit www.GenesisBenefits.net and click on Participant Login in the upper right corner. Choose your Login Type, based on the plan(s) you are enrolled in this year. If you currently have an account, you should continue to use your established username and password. The following default is for first time users:

USERNAME:	Social Security Number (no dashes) <i>You may update your username on a request basis. You decide if you wish to use your Social Security Number as the username to login to your FSA online account with Genesis. Below are instructions for submitting a participant username change request.</i>
PASSWORD/PIN:	Last 4 digits of Social Security Number <i>First time users will be prompted to choose a unique password for future use.</i>

Following are instructions for submitting a participant username change request:

- The plan participant contacts the Genesis Customer Care team to request the username change:

[Genesis Employee Benefits Customer Care](#)

Hours: Monday- Friday (7:30 a.m. to 4:30 p.m. CST)
Toll-Free Phone: 1-866-678-8322
Email: CustomerCare@GenesisBenefits.net

- Per standard security compliance procedures established by Genesis, Customer Care validates the participant's identity before providing information about the account or making changes. A plan participant may be asked to provide the zip code for his/her home mailing address and the last four digits of his/her Social Security Number.
- Upon verification of the participant's identity, the plan participant will inform Genesis of the username he/she would like to use. Usernames must be unique to the Genesis system, and Genesis will try their best to accommodate the initial request. However, if the username is already selected on the Genesis system, the participant will be asked to choose a different username. Genesis recommends that participants select a username that uses a combination of uppercase and lowercase letters and numbers to ensure both security and a unique username.

The screenshot shows the Genesis Employee Benefits website. At the top left is the Genesis logo. Below it is a navigation bar with links: HOME, VEBA/115, FLEX, HRA, COBRA, BILLING, SUPPORT, RESOURCES, ABOUT US. To the right of the navigation bar are three login links: Participant Login, Plan Sponsor Login, and Consultant Login. A dropdown menu is open, listing various account types: I have Both a VEBA and Flex Account, I only have a Flex Account, I only have a VEBA (or 115) Account, I only have a Genesis HRA/105 Account, I only have a FINRA RMA Account, COBRA/State Continuation Account, Retiree Billing Account, and Online Flex Open Enrollment. A red arrow points to the 'I only have a Flex Account' option, with a text box to its right that says 'Select account login type by clicking here'. Below the navigation bar is a large banner with the text 'Finally... 21st Century Benefits Administration!' and a description of Genesis Employee Benefits. To the right of the banner are four links: Request a Proposal, Live Meeting Login, About Us, and Contact Us.

2. File Claims or Review Accounts

Login to the Claims Tool Kit based on your login type. Once on the Claims homepage, you can view the accounts you are enrolled in, account balances, and claim history.

To file claims, either click on File Claims under the Accounts tab, or click on the File Claim link next to the Account Name on the homepage.

Genesis Employee Benefits. File Claims

HOME ACCOUNTS PROFILE NOTIFICATIONS FORMS LINKS [Logout](#)

Welcome

Welcome to your single source for all you need to know about your pre-tax benefits. File claims, upload receipts, check payment status, view account balance and summary information, access important notifications about your account, and more!

Accounts [View Account Summary](#)

Account	Available Balance	Final Service Date	Final Filing Date	Actions
Medical FSA-Green Plan 7/1/2010-6/30/2011 GREEN FSA	\$4,000.00	6/30/2011	9/28/2011	File Claim View Claim History
Dependent Care FSA-Green Plan 7/1/2010-6/30/2011 GREEN FSA	\$1,041.73	6/30/2011	9/28/2011	File Claim View Claim History

Questions?
Contact Genesis Customer Care Center at: (952) 653-4422 Or toll free at: (866) 678-8322 or CustomerCare@GenesisBenefits.net.

Accounts **Profile** **Notifications** **Forms**
[Account Summary](#) [Profile Summary](#) [Notification History](#)
[File Claims](#) [Dependents](#)
[Payment History](#)
[Election Summary](#)
[Plan Descriptions](#)

File claims directly from the home screen by clicking here

3. Enter Claim Information

Enter the information from your claim, completing all required fields, designated with an *

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File Claim: Medical FSA-Green Plan Claims Basket (0)

Please enter your claim information below. If all or part of your claim is not reimbursable due to auditing factors (i.e. claim exceeds available balance in your account), then you will only be reimbursed the approved amount. You will be notified of any pending or denied claim amounts.

* Do You Have a Valid Receipt? No Yes [What is a valid receipt?](#)

* Date of Service: Format date as mm/dd/yyyy.

* Claim Amount: \$

* Provider:

* Category: [What expenses are eligible?](#)

* Type:

Description:
If the category is "Other" or "Over-the-Counter Drugs", you must provide a description.

* Recipient: Carol Brady [Add Dependent](#)

* Did You Drive To Receive This Product/Service? No Yes: miles [How is mileage claimed?](#)

Mileage Reimbursement:
Total Claim Amount:

* Required field

Receipts are required for all claims filed

The date must be formatted mm/dd/yyyy

Enter the number of miles you traveled for this product or service and the system will calculate your mileage reimbursement, based on the IRS designated reimbursement rate. A receipt is not required for mileage.

When Complete, click Add Claim

4. Enter Multiple Claims

If you are entering more than one claim, add additional claims by selecting "File New Claim". Then choose the plan from the drop down menu for the next claim and repeat step 3 above. You can see how many claims you have entered by viewing the Claims Basket in the upper right corner of the screen.

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Claims Basket Claims Basket (1)

	Date of Service	Plan	Type of Product/Service	Provider	Claim Amount	Approved Amount*	
<input type="button" value="Update"/>	9/1/2010	Medical FSA-Green Plan	Medical Deductible	Dr. Lisa Good	\$250.00	\$250.00	<input type="button" value="Remove"/>
Total:					\$250.00	\$250.00	

* The approved claim amount will be reimbursed based on your available balance. If a plan requires funds to be contributed prior to the reimbursement of claims, you will be reimbursed as funds become available in your plan account.

Terms and Conditions
 I have read and agree to the [Terms and Conditions](#).

You must choose to **SUBMIT** this basket in order to send these claims for processing.

The Claims Basket tracks the number of claims you have filed

File another claim here

5. Submit the Claims

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Claims Basket
Claims Basket (2)

File New Claim

	Date of Service	Plan	Type of Product/Service	Provider	Claim Amount	Approved Amount*	
Update	9/1/2010	Medical FSA-Green Plan	Medical Deductible	Dr. Lisa Good	\$250.00	\$250.00	Remove
Update	9/1/2010	Medical FSA-Green Plan	Prescription Medication Copay/Cost	CVS Pharmacy	\$35.00	\$35.00	Remove
Total:					\$285.00	\$285.00	

* The approved claim amount will be reimbursed based on your available balance. If a plan requires funds to be contributed prior to the reimbursement of claims, you will be reimbursed as funds become available in your plan account.

Terms and Conditions

I have read and agree to the [Terms and Conditions](#).

You must choose to **SUBMIT** this basket in order to send these claims for processing.

Submit
Cancel

Read and agree to the Terms and Conditions then check

Submit the Claims Basket

6. Print or Save Confirmation

After you submit the Claims Basket, you will receive a confirmation page. Using the navigation buttons at the bottom of the screen, Print the confirmation page. **If you plan to upload your receipts electronically, you must save (or print to Adobe as a .pdf) this confirmation page on your computer. It has to be saved electronically to upload online.**

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Claim Confirmation

City of America
You have successfully filed the claim(s) listed below.

Secure Receipt Upload enables you to upload your confirmation and receipts directly to Genesis if you have your receipts saved electronically. Choose "Secure Receipt Upload" under the Links tab on the website to get started. You must have your confirmation saved electronically to use the Secure Receipt Upload. Choose PRINT CONFIRMATION below to save this page electronically, or print it to Adobe as a .pdf. If you do not have your receipts saved electronically, you can fax, email or mail them to Genesis using the contact information below.

Receipt(s) Required - Print this Page:
Print this confirmation, attach the required receipts and fax or mail to Genesis Employee Benefits, Inc. at one of the contacts listed below.

Fax: (952) 460-1480
Mail: PO Box 1578
Minneapolis, MN 55440
Email: CustomerCare@GenesisBenefits.net

If you are unable to print this confirmation:
Send your receipts with a note that includes (a) the name of the company you work for, (b) your name, and (c) the claim number(s) listed below.

Claim Number	Plan	Date of Service	Receipt Amount	Mileage Amount	Approved Amount*	Receipt Required
001100907P0000101	Medical FSA-Green Plan	9/1/2010	\$250.00	\$0.00	\$250.00	Yes
001100907P0000102	Medical FSA-Green Plan	9/1/2010	\$35.00	\$0.00	\$35.00	Yes
Totals:			\$285.00	\$0.00	\$285.00	

* The approved claim amount will be reimbursed based on your available balance. If a plan requires funds to be contributed prior to the reimbursement of claims, you will be reimbursed as funds become available in your plan account.

Please send in the Required Receipt(s) listed above within 30 days. If we do not receive the receipt/s by this date, your reimbursement may be denied.

Remember, regardless of which (if any) receipts you are required to submit, you are responsible for retaining a copy of all receipts for three years in the event you or your Pre-tax Account plan are audited by the IRS.

Trouble printing your confirmation? Get latest version of Adobe Reader at <http://www.adobe.com> or print from your browser by selecting File | Print in your browser menu.

A confirmation of your claim submission will be emailed to you

Click "Print Confirmation" to save an electronic copy of your confirmation or print a .pdf document that can be uploaded with your receipts

You can download Adobe Reader so you are able to print or save .pdf documents

7. Submit your Receipts

If you wish to send your receipts to Genesis electronically using the [Secure Receipt Upload](#), follow the instructions below. If you wish to send your receipts by fax, print Confirmation page from Step 6 and send them using the contact information on your Confirmation page.

Important Tips:

- To upload your receipts using [Secure Receipt Upload](#), you must have them saved electronically on your computer. Acceptable file formats for receipts include .pdf, .jpg, .jpeg, .gif, .tif, .tiff, and .png. Receipts sent in other file formats may be rejected.
- There are several ways to save claims electronically, including:
 - Scan your receipts using a scanner connected to your computer to create the file(s)
 - Download receipts like Explanations of Benefits (EOBs) directly from your healthcare provider's website
 - Take a digital picture of your receipts and save it on your computer.
- Each receipt must contain the date of service, product/service name or description, provider name, and recipient name (unless it is a store receipt for prescriptions).
- Explanation of Benefits (EOB) documents from your health insurance provider contain all of the information necessary to substantiate your claims. *If you have an EOB for your expense, it is not necessary to send additional documentation.*
- You can scan and upload all of your receipts in one document or in multiple documents.
- Claims and valid receipts must be received by Genesis in order for the claim to be reimbursed. Claims are processed and reimbursed every business day, and typically take 3-5 business days from your date of submittal until you receive the direct deposit reimbursement to your bank account. Please see the processing schedule for exceptions.

[See Next Page for Secure Receipt Uploading Instructions](#)

Secure Receipt Upload

1. After filing your claims online, click the Links tab and choose [Secure Receipt Upload](#) from the dropdown menu, or, go to www.GenesisBenefits.net and click on [Secure Receipt Upload](#) under the Resources tab.
2. Upload Your Confirmation and Receipts

Genesis Upload Receipts
Employee Benefits.

Welcome

Before uploading Receipts, you must have both your **Claim Confirmation** and your **Receipts** saved electronically on your computer. Acceptable file formats for receipts include .pdf, .jpg, .jpeg, .gif, .tif, .tiff, and .png. Receipts sent in other file formats may be rejected. Please read the **Disclaimer** and **Terms** for more information.

Instructions

1. Enter the plan participant's name, organization, and email address.
2. Click Browse and find the Confirmation saved on your computer. Choose the file and click Open.
3. Click Browse and find the first receipt saved on your computer. Choose the file and click Open.
4. Repeat Step 3 for each receipt and then click "Submit Your Receipts".
5. If you have more than four receipts to upload, submit the first four then follow the prompt for additional submissions.
6. When you have finished uploading receipts, simply close the page.

*Full Name: ?

*Organization: ?

*Email: ?

*Confirmation: Browse... ?

*Receipt 1: Browse... ?

Receipt 2: Browse...

Receipt 3: Browse...

Receipt 4: Browse...

Submit Your Receipts

Questions?
Contact Genesis Customer Care Center at: (952) 653-4422 Or toll free at: (866) 678-8322 or CustomerCare@GenesisBenefits.net

Enter participant's name, employer name, and email address

Browse your computer for the Claim Confirmation page you saved electronically and click Open to attach

Browse your computer for your first receipt and click Open to attach

Browse your computer and attach up to 3 additional receipts

Click Submit Your Receipts

3. Uploading more than 4 Receipts

You may add more receipts after you submit the first four, if necessary, by following the instructions above. When you have uploaded all receipts, simply close the [Secure Receipt Upload](#) browser window.

Questions? Contact Genesis Employee Benefits Customer Care Hours are Monday – Friday, 7:30 a.m. to 4:30 p.m. CST

Local Claims eFax: 952-460-1480

Toll-Free Claims eFax: 866-450-1480

Email: Claims@GenesisBenefits.net

Local Phone: 952-653-4422

Toll-Free Phone: 866-678-8322

CustomerCare@GenesisBenefits.net

Check the status of your claim online at www.GenesisBenefits.net.