



# NueSynergy

CUSTOMER FOCUSED & TECHNOLOGY DRIVEN



# BENEFIT ACCOUNT WELCOME KIT



**NueSynergy**  
CUSTOMER FOCUSED & TECHNOLOGY DRIVEN

Full-service administration of consumer-driven and traditional account-based plans.  
855.890.7239 • 4601 College Blvd. Suite 280, Leawood, KS 66211 • [www.NueSynergy.com](http://www.NueSynergy.com)



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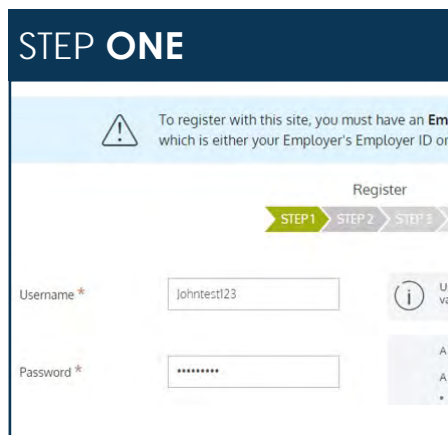
## ONLINE REGISTRATION

Accessing your account through the online member portal will enable you to submit claims electronically for faster approval, access balance and claims history, important communications and more.

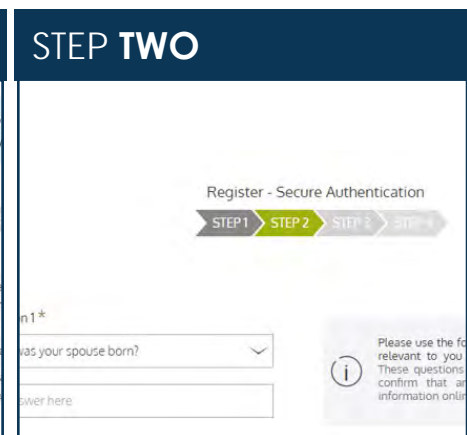
Setting up your account for online access is easy! Just follow the steps below.  
(For additional help you can download the Registration Guide with step by step screen shots at [www.NueSynergy.com](http://www.NueSynergy.com).)



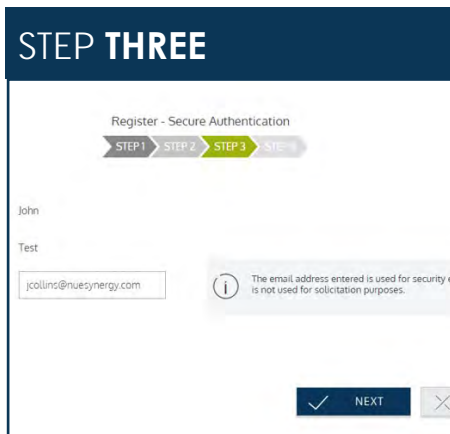
- Go to [www.NueSynergy.com](http://www.NueSynergy.com)
- Click Log in > Participant
- Select "Log-In" under Participant (HSA/HRA/FSA) box



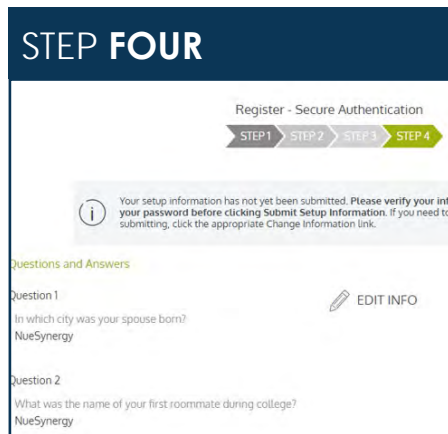
- Read **all instructions**
- Start by creating a username
- Fill out remaining required fields
- Accept terms of use
- Click next



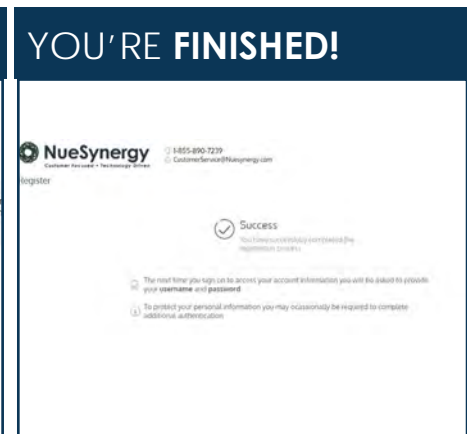
- Fill out **security questions**
- Click next



- Confirm your **email address**
- Click next



- Confirm **your information**
- Click submit



- You've successfully completed the registration process





## ONLINE DIRECT DEPOSIT

### STEP ONE

- After registering, sign in to your account and select 'Get Reimbursed Faster' on the homepage



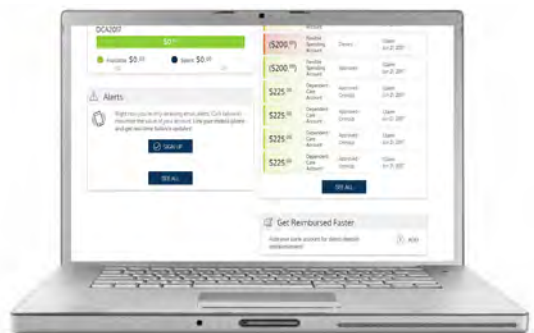
### STEP TWO

- Review the example on the screen of where to find your routing and account number on your check
- Input both numbers exactly as they appear on your check.
- Click save



### YOU'RE FINISHED!

- You've successfully completed the online direct deposit process





# HOW TO FILE A CLAIM

## FILE YOUR CLAIM **ONLINE**

One of the easiest ways to submit your claim for reimbursement is by completing our online claim form at [www.NueSynergy.com](http://www.NueSynergy.com). Once your claim is processed an email notification will be sent to your email address on file confirming approval or requesting additional documentation.

### STEP ONE

- Go to [www.NueSynergy.com](http://www.NueSynergy.com)
- Log-in to your online account
- Click claims
- Select add claim for immediate reimbursement or
- Add claim for future reimbursement



### STEP TWO

- Enter your claim detail
- Drag and drop, or upload your scanned receipts
- Read certification statement
- Click box to agree
- Click submit





# HOW TO FILE A CLAIM

## FILE YOUR CLAIM WITH NUESYNERGY MOBILE

Filing a claim with the free NueSynergy mobile app is fast and easy. Once your claim is processed, an email notification will be sent to your email address on file confirming approval or requesting additional documentation.

### STEP ONE

- Log-in to the NueSynergy Mobile App
- Click claims
- Select add claim for immediate reimbursement or
- Add claim for future reimbursement



### STEP TWO

- Take photo of receipt and upload
- Select preview after taking your photo
- Select submit if all information is correct
- Accept the disclosure



## FILE A PAPER CLAIM

You can download a copy by going to [www.NueSynergy.com](http://www.NueSynergy.com).  
You can also [click here](#) to download a copy.

Claims can be faxed or emailed to NueSynergy at:

Fax: 855.890.7238 | Email: [customerservice@NueSynergy.com](mailto:customerservice@NueSynergy.com)

# HOW TO GUIDE

## Repaying an Ineligible Claim



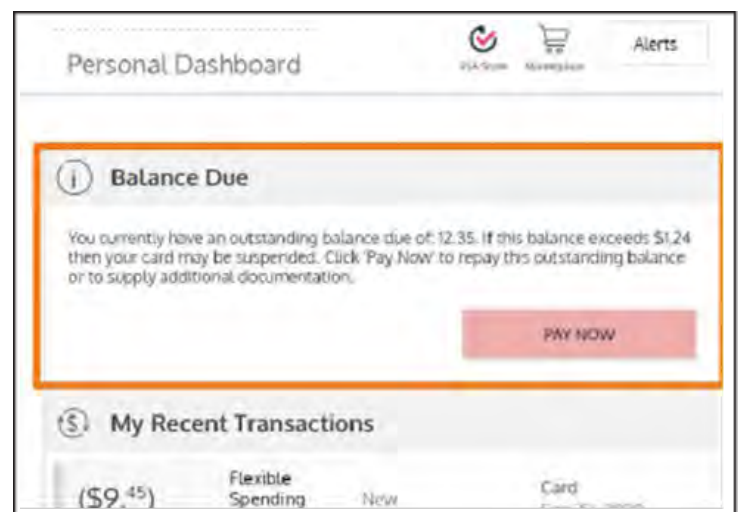
If you must repay the plan for an ineligible claim, please follow the below repayment instructions for both the participant portal and mobile app.

### Participant Portal



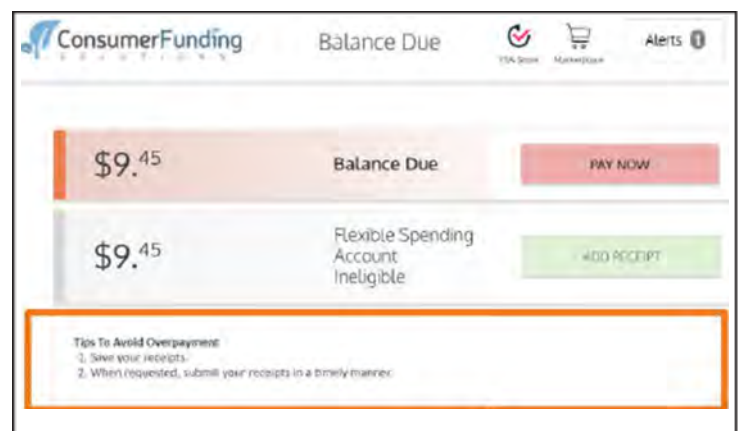
#### STEP 1

Click on *Pay Now*, located on the right-hand side of your dashboard screen within the box labeled "Balance Due."



#### STEP 2

On the "Balance Due" page, you will see the amount of the balance due. Click *Pay Now* located to the right of the balance listed.







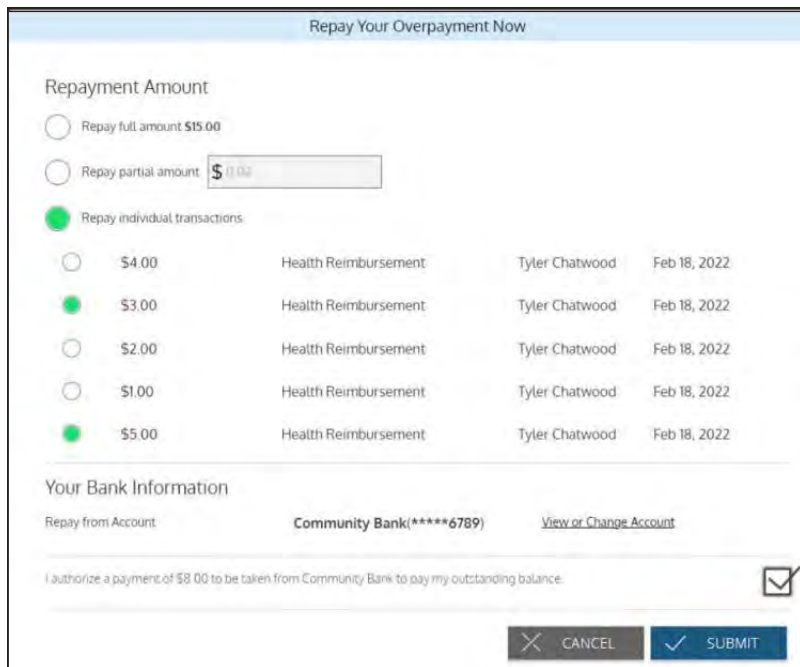
## STEP 3

You have 3 payment options:

1. Pay the balance in full
2. Pay partial amount
3. Or select each transaction individually

Lastly, verify your bank information, check the box authorizing the payment, then click *Submit*.

You may use your previously-provided direct deposit bank account to repay the outstanding amount, or opt to use a different bank account. If a new bank account is entered, you must go through the usual account validation steps if enabled.



**Repay Your Overpayment Now**

Repayment Amount

☐ Repay full amount \$15.00

☐ Repay partial amount \$11.00

☒ Repay individual transactions

Amount	Transaction Type	Name	Date
<input type="radio"/> \$4.00	Health Reimbursement	Tyler Chatwood	Feb 18, 2022
<input checked="" type="radio"/> \$3.00	Health Reimbursement	Tyler Chatwood	Feb 18, 2022
<input type="radio"/> \$2.00	Health Reimbursement	Tyler Chatwood	Feb 18, 2022
<input type="radio"/> \$1.00	Health Reimbursement	Tyler Chatwood	Feb 18, 2022
<input checked="" type="radio"/> \$5.00	Health Reimbursement	Tyler Chatwood	Feb 18, 2022

Your Bank Information

Repay from Account: Community Bank(\*\*\*\*6789) [View or Change Account](#)

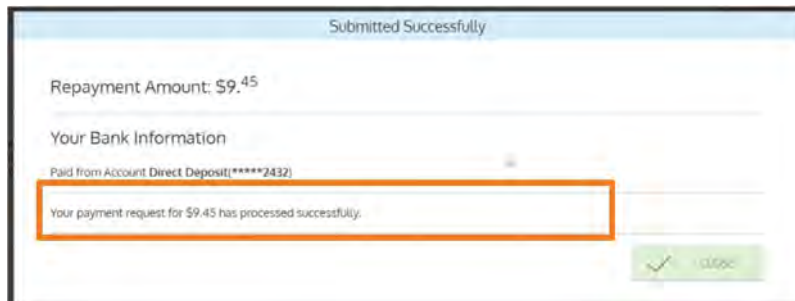
I authorize a payment of \$8.00 to be taken from Community Bank to pay my outstanding balance. ☒

*Note: You may only store one bank account for both direct deposit claim reimbursement and online payment. Credit cards are not accepted.*

## FINISHED!

After clicking *Submit*, a confirmation screen will appear.

*Note: Your repayment can take up to two business days to process.*



**Submitted Successfully**

Repayment Amount: \$9.45

Your Bank Information

Paid from Account Direct Deposit(\*\*\*\*2432)

Your payment request for \$9.45 has processed successfully.

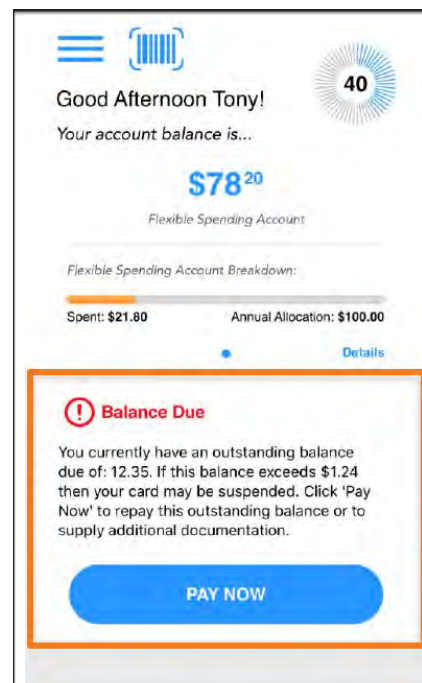
☒ [Close](#)



## Mobile App

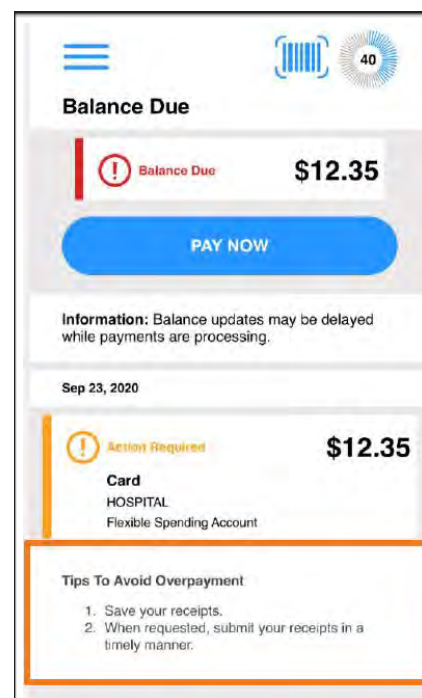
### STEP 1

Click on *Pay Now* located below "Balance Due" at the bottom of your screen.



### STEP 2

On the "Balance Due" screen, you will see the amount of the balance due. Click *Pay Now* located under the balance listed.





## STEP 3

You have 3 payment options:

1. Pay the balance in full
2. Pay partial amount
3. Or select each transaction individually

Lastly, verify your bank information, check the box authorizing the payment, then click *Pay Now*.

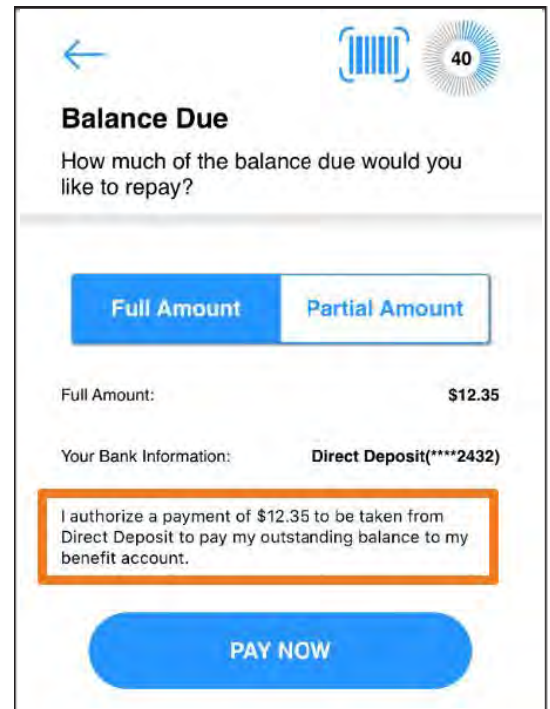
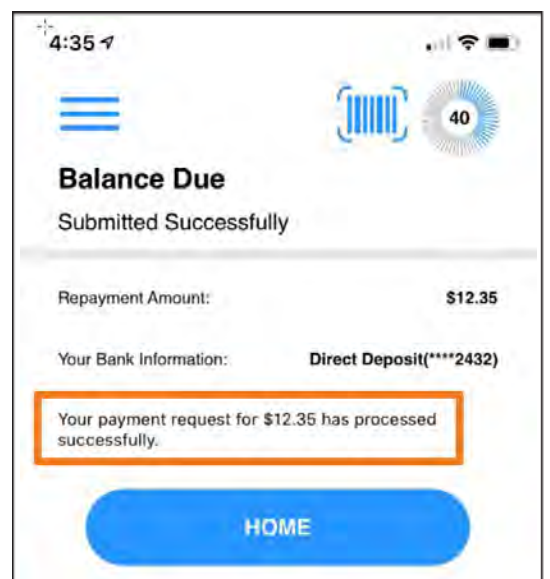
You may use your previously-provided direct deposit bank account to repay the outstanding amount, or opt to use a different bank account. If a new bank account is entered, you must go through the usual account validation steps if enabled.

*Note: You may only store one bank account for both direct deposit claim reimbursement and online payment. Credit cards are not accepted.*

## FINISHED!

After clicking the *Pay Now* button, a confirmation screen will appear.

*Note: Your repayment can take up to two business days to process.*



## NUESYNERGY DEBIT CARD

The NueSynergy benefits debit card provides a convenient method to pay for out-of-pocket medical expenses for you, your spouse and/or any tax dependents. The IRS imposes strict regulations on where the NueSynergy benefits debit card can be used and when follow-up documentation is required to substantiate a qualified expense. The card is a convenient benefit, but it is important that you take a moment and understand how it works.

### Where is the NueSynergy benefits debit card accepted?

Participants can use the debit card at qualified merchants (as determined by the employer's plan document) to pay for:

- Office visit co-pays
- Deductible-related expenses
- Prescriptions
- Dental work (including orthodontia)
- Eyeglasses & contacts

### How does NueSynergy verify that the benefits debit card is used only for qualified expenses?

The IRS-imposed limitations help ensure that the card is used only for qualified expenses. When the card is swiped at a qualified merchant and there is a sufficient balance available in the participant's benefit account, the qualified purchase will be paid directly from the reimbursement account.

The IRS requires participants to keep all receipts for benefit account expenses for seven years in the event of a tax audit. If there is a discrepancy or unusual transaction amount, NueSynergy is required by the IRS to verify the transaction. If a transaction cannot be electronically substantiated a participant will be sent a notification via email to submit a third-party receipt showing the date of service, description or type of treatment and the amount owed.

All plan communication pertaining to your account activity is provided solely via email at the [www.NueSynergy.com](http://www.NueSynergy.com) website. It is important to notify NueSynergy if you change your email address.

### What are the advantages of using the NueSynergy benefits debit card?

Participants who use the card at qualified merchants may pay for eligible expenses without having to submit a claim and wait for reimbursement. Participants can logon to [www.NueSynergy.com](http://www.NueSynergy.com) for real-time, online account information including balance, deposits made to date and a list of pending and completed payments.

Recurring benefit debit card expenses for the exact amount at the same provider can be set up as a recurring transaction. When you submit your initial documentation, please include a note stating the transaction will be a recurring expense. This will prevent the need for additional documentation on future purchases of the same item purchased at the same provider.

### Does the participant always have to use the NueSynergy benefits debit card for claim reimbursement?

No. There will be times when a merchant does not accept the benefits debit card. This does not mean that the expense is not eligible. Participants will need to pay for the expense from their personal funds and then submit a claim for reimbursement. Claim forms are provided to participants at Open Enrollment and can be found at [www.NueSynergy.com](http://www.NueSynergy.com).

### How do I send my required documentation for substantiation of my NueSynergy benefits debit card transactions?

You can submit documentation by using NueSynergy Mobile, your member portal at [www.NueSynergy.com](http://www.NueSynergy.com), fax, email or mail completed forms and copies of bills, receipts, or invoices to:

NueSynergy, Inc.  
4601 College Blvd., Ste. 280, Leawood, KS 66211  
Fax: 855.890.7238 Email: [customerservice@NueSynergy.com](mailto:customerservice@NueSynergy.com)

\*The debit card is not offered with all plans.





## NUESYNERGY MOBILE APP

NueSynergy is excited to offer you a new way to access your account! By downloading the NueSynergy Mobile app on either your Apple or Android mobile device, you will have a single access point to manage your benefit account.



### NueSynergy Mobile **enables you to:**

- See detailed account information
- View your account balance and plan details
- Review recent transactions and details
- View all email and SMS alerts
- Contact administrator from mobile application via email or mobile phone
- Submit a claim for substantiation
- Take a photo of a receipt or bill and attach it to a new or existing claim or debit card transaction for approval

You can download the NueSynergy Mobile Application by going to the App Store on your Apple device or GooglePlay on your Android and search for NueSynergy:

### STEP ONE

- Access App Store (iPhone) or GooglePlay (Android)
- Search for NueSynergy
- Select install and accept app permissions
- Select the app once NueSynergy Mobile is downloaded



### STEP TWO

- Sign in using the same username and password as for your Participant Portal at [www.NueSynergy.com](http://www.NueSynergy.com)  
(If you have not setup your account on the participant portal, you will need to do so before signing onto NueSynergy Mobile)



## eCLAIMS MANAGER

Provides access to an employee's claims data or explanation of benefits (EOBs), allowing increased auto-substantiation of debit card claims and easier electronic manual claim submission. eClaims Manager is fully integrated into the NueSynergy member portal and allows employees centralized access to their EOBs, simplifying the management of their HSA, FSA or HRA.

### WHAT IS eCLAIMS MANAGER?

#### Centralized Access to Carrier Claims







## NUESYNERGY CONTACT US

Have questions about your account? NueSynergy is here to help! Our knowledgeable team will make sure you get the support you need. We look forward to hearing from you.



NueSynergy, Inc.  
4601 College Boulevard, Suite 280  
Leawood, KS 66211



855.890.7239(ext. 2)



[customerservice@nuesynergy.com](mailto:customerservice@nuesynergy.com)

## NueSynergy **ABOUT US**

Since 1996, NueSynergy has provided clients with full-service administration of consumer-driven and traditional account-based plans, as well as COBRA administration. Located in Leawood, Kansas, we have built a reputation throughout the US with both Fortune 1000 corporations and small businesses for our technology-based solutions and knowledgeable, personalized service. All operational divisions from executive management to customer service are housed at our corporate headquarters. This operational design translates into improved communication and operational efficiencies, ensuring clients receive faster, seamless service. NueSynergy offers a fully integrated suite of administration services, managed by subject matter experts with an average of 10 years direct industry experience.

Our administration services include:

- Flexible Spending Arrangements
- Health Savings Accounts
- Health Reimbursement Arrangements
- COBRA
- Direct Bill
- Consolidated Billing

