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File a Spending Accounts Claim via Mobile

Mobile claim filing is available for Medical Flexible Spending Accounts (FSA), Dependent Care Flexible Spending Accounts (FSA), Transportation Management Accounts (TMA), and Health Reimbursement Accounts (HRA).

The CARES Act expands eligibility for certain items to get reimbursed from pre-tax spending accounts, namely over-the-counter (OTC) medicines purchased without a prescription and menstrual products. Purchases of these items made on or after January 1, 2020, can get reimbursed from Flexible Spending Accounts (FSAs), Health Reimbursement Arrangements (HRAs), Health Savings Accounts (HSAs), and Archer Medical Savings Accounts (MSAs) via a manual claim.

1. Log into the Paylocity Spending Accounts mobile application (app).
2. Select the desired benefit account from the menu. **Account Details** page displays.
3. Select **File a Claim** link in upper right.
4. Select **Cancel** to return to **Account Details** page, otherwise continue.
5. Select the **Camera** icon to either upload or take a photo of the receipt.
6. Complete **Claim Details**:
   - **Amount**
   - **Start Date**
   - **End Date**
   - **Provider**
   - **Provider SSN or Tax ID**, if applicable.
   - **Category**: Select **Drugs & Medicine** for over-the counter medicines purchased without a prescription or menstral products.
   - **Type**: Select **Over the Counter** for over-the counter medicines purchased without a prescription or menstral products.
   - Select a **Dependent**, if applicable.
   - Select a **Recipient/Patient**, if applicable.
   - Toggle on **Did You Drive?** to include mileage in reimbursement, if applicable.
   - Enter the number of miles for driving reimbursement, if applicable.
7. Select **Submit**.
   - User returns to **Account Details** page.
   - Banner message displays **Your claim was submitted**.

You can view this article at:
https://paylocity.egain.cloud/system/templates/selfservice/pcty/help/agent/locale/en-US/portal/308600000001000/content-version/PCTY-74887/PCTY-1035865/File-a-Spending-Accounts-Claim-via-Mobile