



CBIZ Flex- How To File A Claim

Visit our Flex participant site myplans.cbiz.com to submit a claim for reimbursement by uploading the receipts.

-Or-

Visit our Flex participant mobile app **MyPlans by CBIZ** to submit a claim for reimbursement by uploading a picture of the receipts.

-Or-

Complete a **claim form** to submit with the adequate receipt information, please ensure the following information is complete:

- Your personal information
- Dates of service
- Provider's information
- Type of service
- Whom the expense is for
- Amount you are claiming
- Your signature

Once the form is complete, attach receipts and send your claim to CBIZ Flex via one of the following methods:

- Mail: CBIZ Payroll (Attn: Flex), 2797 Frontage Road, Suite 2000 Roanoke, VA 24017
- Fax: 800.584.4185

A valid receipt must be attached to your claim form and should contain the following:

- Date of service
- Type of service
- Amount of expense
- Provider's information

This pertains to medical, dental, vision, and dependent care expenses.

Reminders:

- Claims are processed daily. Claims received by 5pm EST on Wednesday, checks will be disbursed on Friday.
- With the Dependent Care account, participants can only claim up to what has been contributed to date. With an Unreimbursed Medical account, participants can claim up to their entire annual election at the beginning of the plan year.
- Copies of cancelled checks and credit card receipts are not accepted as valid receipts.



Your Business Just Got Easier.