



Submitting Claims with Simply Benefits

Welcome to Simply Benefits! We're excited to show you around.

This **step-by-step guide** will outline everything you need to know about how to submit a claim with Simply Benefits. Whether you're using the member portal in your web browser or the member mobile app, this document will make sure you're prepared and ready to submit a **successful claim**. Don't be intimidated by all the steps, the entire process will take you **30 seconds!**

Submitting a Claim Through the Simply Benefits **Mobile App**.

- 1 Login to your Simply Benefits member account with your email and password
- 2 Select the **Menu Icon**  then click the **Submit a Claim** tab in the menu or click on the Plus Icon  in the bottom center of the home or claims page
- 3 Choose the Patient under whom the claim is being submitted. If you have dependents, their names will be listed under the patient selection
- 4 Select the **Category** for the claim from the options provided
- 5 Pick the Service you are submitting the claim for. **Note:** the chosen category directly impacts the options you have under the service. If you happen to choose the incorrect category, you can select a different category
- 6 (Optional) Input the Clinic Name for **quicker reimbursement**
- 7 Click the **Next** button at the bottom of the screen
- 8 It's time to attach your receipt. You can **Take a Photo**, **Select a Photo**, or **Select a PDF** of the invoice or receipt to be reimbursed
- 9 Click the **Next** button at the bottom of the screen
- 10 If applicable, provide any supporting documents*. If you don't have any supporting documents to add, jump to step 12.
*If you or your dependent have submitted this claim for reimbursement through your or your dependent's primary carrier, **you must include an Explanation of Benefits (EOB)** here
- 11 Click the **Next** button at the bottom of the screen
- 12 Input the full Amount Submitted for the claim
- 12 Add the Service Date in this format: **MM/DD/YYYY**
- 14 Select the checkbox to acknowledge that the provided information is correct to the best of your knowledge
- 15 Click the **Next** button at the bottom of the screen
- 16 Review all the information to ensure it is accurate and click on **Finish** at the bottom of the screen, and you're **done!**

Please Note: if you have a **Health Spending Account (HSA)** with your benefits plan, you will be prompted with an option to **Top Off** your remaining balance. You can choose to top it off by selecting **Yes** or pay the remaining balance out of pocket by selecting **No**.

Have questions? We're here to help!

1-877-815-7751 | support@simplybenefits.ca | simplybenefits.ca

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Submitting a Claim Through the Simply Benefits [Web Portal](#).

- 1 Go to member.simplybenefits.ca and login to your Simply Benefits member account with your email and password
- 2 Navigate to the **Claims** page by selecting Claims tile
- 3 Click on the **Submit Claim** button on the top right corner of the screen
- 4 Choose the Patient under whom the claim is being submitted. If you have dependents, their names will be listed under the patient selection
- 5 Select the **Category** for the claim from the options provided
- 6 Pick the Service you are submitting the claim for. **Note:** the chosen category directly impacts the options you have under the service. If you happen to choose the incorrect category, you can select a different category
- 7 (Optional) Input the Clinic Name for **quicker reimbursement**
- 8 Click the **Next** button at the bottom of the pop-up screen
- 9 It's time to attach your receipt. Select the receipt of the invoice (**PDF** and **PNG** images are accepted) and upload it from your device
- 10 Click the **Next** button at the bottom of the pop-up screen
- 11 If applicable, provide any supporting documents*. If you don't have any supporting documents to add, jump to step 12.
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- 17 Review all the information to ensure it is accurate and click on Finish at the bottom of the screen, and you're **done!**
Please note that if you have a **Health Spending Account (HSA)** with your benefits plan, you will be prompted with an option to Top Off your remaining balance. You can choose to top it off by selecting **Yes** or pay the remaining balance out of pocket by selecting **No**.

Once your claim is submitted you will be able to review the status of the claim on the **Claims History** page. Once your claim is approved, your reimbursed amount will be directly deposited to the bank account that you provided after your enrollment. If your claim is declined, an EOB will be attached to the claim with any adjudication notes found in the EOB and sent via email.

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