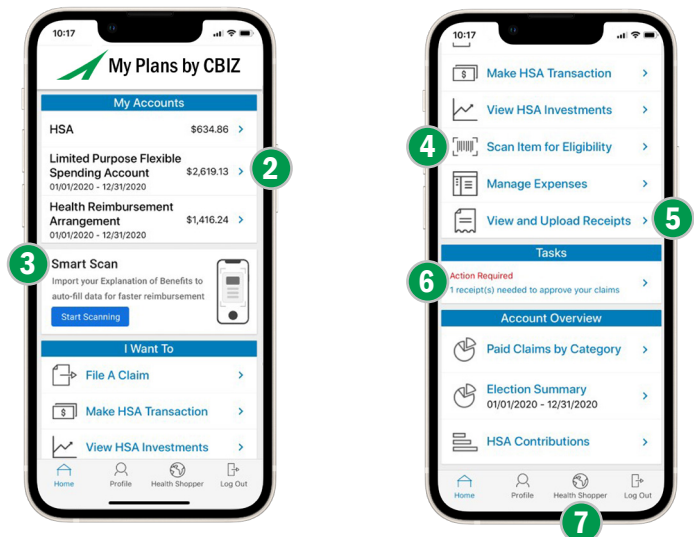


# Mobile App

SECURE, AROUND-THE-CLOCK  
INFORMATION RIGHT AT YOUR  
FINGERTIPS, ALLOWING YOU TO  
MANAGE YOUR ACCOUNT ON THE GO.

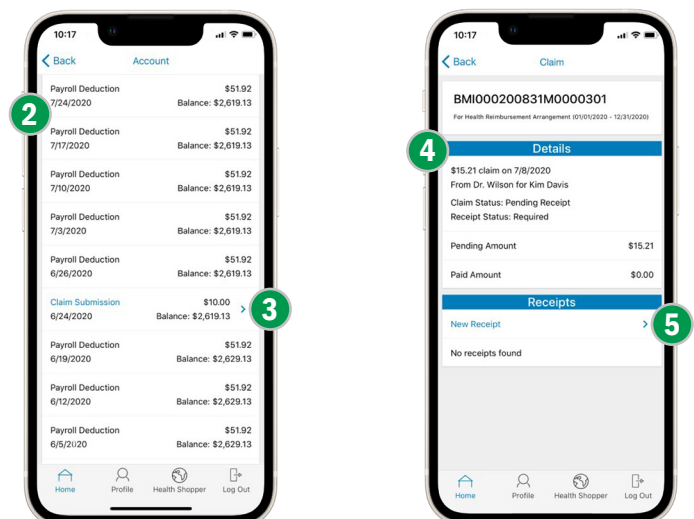
## GETTING STARTED

1. Open the *My Plans by CBIZ* mobile app (download in the *Apple App Store* or *Google Play Store*) and sign in with your username and password.
2. Quickly view available balances and access account details by tapping the arrow (➤) beside the appropriate account.
3. Access the **Smart Scan** feature to take a photo of your Explanation of Benefits and start a new claim.
4. Scan the bar code of an over-the-counter item to determine if it is an eligible expense.
5. Take or upload a picture of a receipt and submit for a new or existing claim.
6. View in-app messages and text alerts that provide instant notifications.
7. Shop for eligible items using **Health Shopper**.



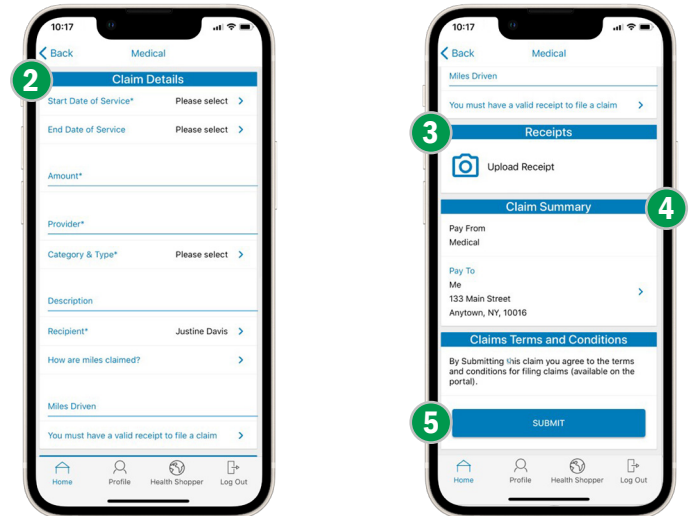
## ACCOUNT DETAILS

1. Easily view account details by selecting the account from the **Home** screen (See #2 under *Getting Started*).
2. View payroll deductions.
3. Access details of a claim by tapping ➤ beside the claim.
4. Details include provider information, claim number, and date of the claim.
5. Easily add a receipt to a claim by tapping ➤ in the **Receipts** section.
6. A new screen will appear allowing you to choose how you would like to upload your receipt.



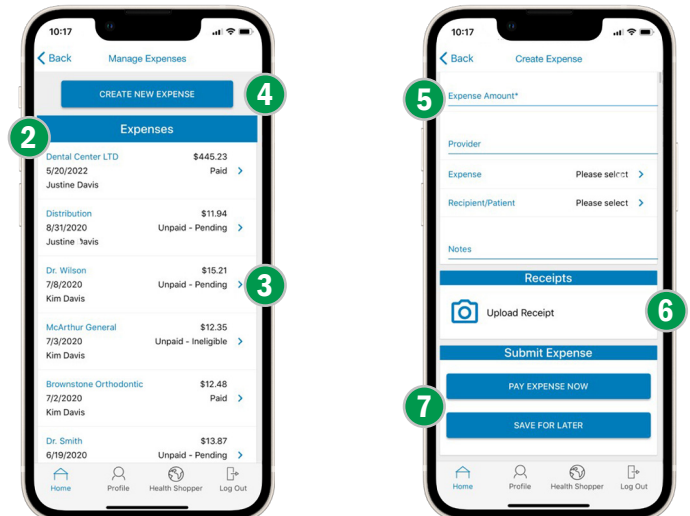
## FILE A CLAIM

1. From the **Home** screen, tap **File A Claim**.
2. Enter claim details (Sections marked with an asterisk\* are required).
3. Upload a receipt from photos already stored on your device or take a photo of the receipt.
4. Once all the information is entered and the receipt is uploaded, the information will display in the **Claim Summary**.
5. Tap **SUBMIT** to file the claim.



## MANAGE EXPENSES

1. From the **Home** screen, tap **Manage Expenses**.
2. A quick view of expenses will appear on the screen, including the expense amount and status.
3. See more details of each expense by tapping > for the selected expense.
4. Easily add a new expense by tapping **Create New Expense**.
5. Enter expense details (Sections marked with an asterisk\* are required).
6. Upload receipt(s).
7. Choose to **Pay Expense Now** or **Save For Later**.



## OTHER FEATURES

1. From the **Home** screen, tap **Paid Claims by Category** to view a snap shot of your claims.

