



Website Instructions

Our FSA and HRA participant website has been updated to offer you 24/7 access to submit claims, update payment information, access forms and reports and obtain other information regarding your plan. Please see the information below for navigation through the website.

*If you are having issues navigating the website, entering claims or accessing any information, please make sure you are using the latest version of the Google Chrome browser. If you are using Chrome, close out of the webpage, hit "F5" and reopen the site. If you are still having issues, please email us at flex@swerdlin.net or contact our call center at 1.866.687.4015 (option 2) from 8:00am - 5:30pm EST.

Account Login

- Using your internet browser, navigate to www.swerdlin.net.
- Click the button entitled "ACCOUNT LOGIN" and choose "PARTICIPANTS" to login to your account.
- **Your default username is your Social Security number with no dashes or spaces and your password is the last four digits of your Social Security Number.** * Please note you will be prompted to change your username and password after logging into the website.
- In case of forgotten user name or password, click on "Forgot User ID or Password" to reset this information to your default login noted above.

Dashboard

- View your available balance, declared amount, YTD deposits, YTD claims submitted, YTD payments, and any fees or adjustments and any pending claims on your account.
- Access and edit your personal information and recent claims.
- Important messages are shown on the dashboard.

Your Benefits

- A summary of your benefits with Swerdlin & Company.

Forms & Reports

- **Reports**
- Monthly FSA statements
- **Forms/Plan Documents**
- FSA / HRA Claim Forms
- Summary Plan Description
- Notice of HIPAA Privacy Practices
- Direct Deposit

Contact Us

- Information on contacting Swerdlin & Company.

Benefits

Debit Card Requests

- Request a new debit card or report one lost/stolen. ***Please note, additional cards will be shipped 2 to a set for a fee of \$5.00.**

Claim History Tab

- You can view your claims history. Choose the plan year that you would like to view under “*Select plan year*”. Then choose the benefit you would like to view and choose the dependent (if any), and then click “*Submit*”.
- You can attach your documentation online by clicking on the “*Claim ID*” next to the claim. This will take you back to the page that allows you to upload claim documentation. If you have entered a claim online but did not upload an attachment, you can print out the claims confirmation page (bottom of the screen) and send to Swerdlin & Company with the documentation for the claim.

Claims Entry Tab

- “*Select Benefit*”: Select the FSA account that applies to your claim.
- “*Start date of service*”: Enter the **date of service** you incurred the claim (not the date that you paid the claim).
- “*End date of service*”: Enter the same date you entered as your “Start date of service”.
- “*Person receiving service*”: If the claim you are submitting is for you, leave N/A. If the claim is for a dependent, select the dependent that incurred the claim.
- “*Service provider*”: Enter the service provider for your claim.
- “*Description*”: Enter a description of your claim.
- “*Amount*”: Enter the amount of the claim.
- Select “*Add*” to add your claim. If you are entering more than one claim, select “*Add*” for each claim. Select “*Continue*” after you have entered all of your claims.
- After clicking “*Continue*”, you will be taken to a page that asks if you would like to submit claim forms and receipts via fax or email; submit claim forms and receipts as attachments online; or state that you are not ready to submit any claim forms or receipts at this time.

- If you choose the second option to submit claim forms and attachments online, you will be taken to a page to upload your attachment(s). ***Please note, if you choose the first or third option, claim attachments must be submitted manually to Swerdlin & Company in order to process your claim.**
- In order to upload your attachment(s), click the box entitled “*Add Attachment*” by your claim(s) and then click the button/square entitled “*Add*” found below your claim.
- Scroll down and select “*Add Attachment*” to add attachment. Select “*Choose File*” to browse your computer and select your attachment. Select “*Open*”. You can add more than one attachment for each claim by selecting “*Add Attachment*” again.
- If you have uploaded your attachment(s) correctly, you will receive a message that states your attachment(s) have been successfully submitted and will receive a confirmation ID.


Transaction History Tab

- This tab allows you to view your transaction history. It shows you transaction dates, types and amounts. This includes payroll contributions to your FSA and claims paid information.
- Under “Select plan year”, choose from the drop down menu for the plan year you would like to view.
- Under “Select benefit”, choose the account you wish to view.
- If you would like to only view one type of transaction (for example claim payments), you should use the drop down menu under “Transaction” and choose the transaction type you would like to view and then click “*Get Results*”.

Payments

- History of payments made to you for your claim reimbursements. There is a search engine available to locate specific payments.

Other Options

- Select the  icon (on the top right corner of your screen) in order to access your personal account settings, password change options, direct deposit setup, submit a claim shortcut, forms and paycheck calculator.