CHARDSNYDER™
Benefit Solutions

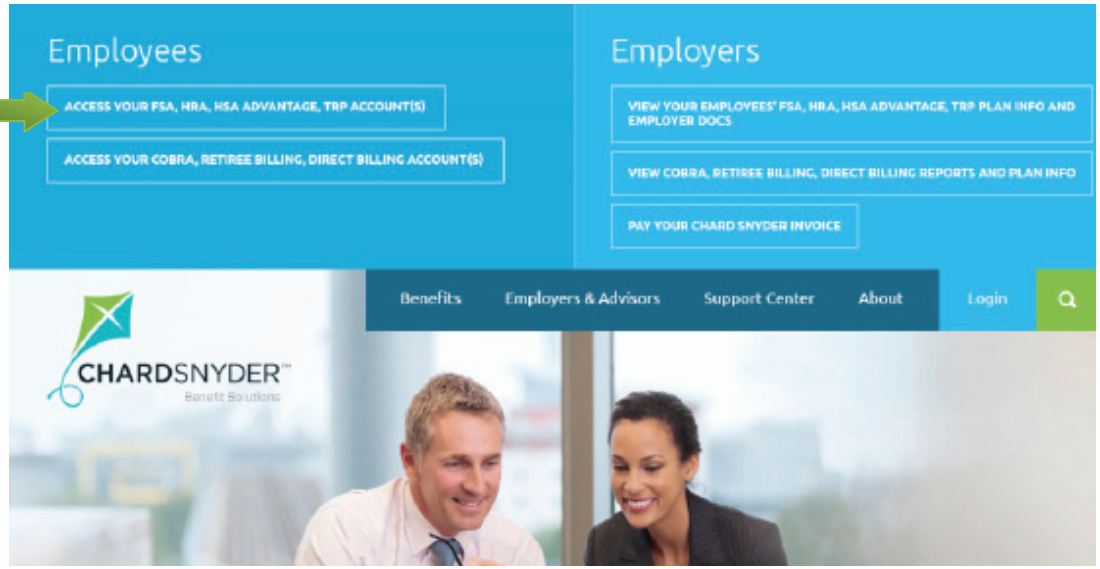
Managing Your Account Online:
Filing a Claim for a Recurring Premium

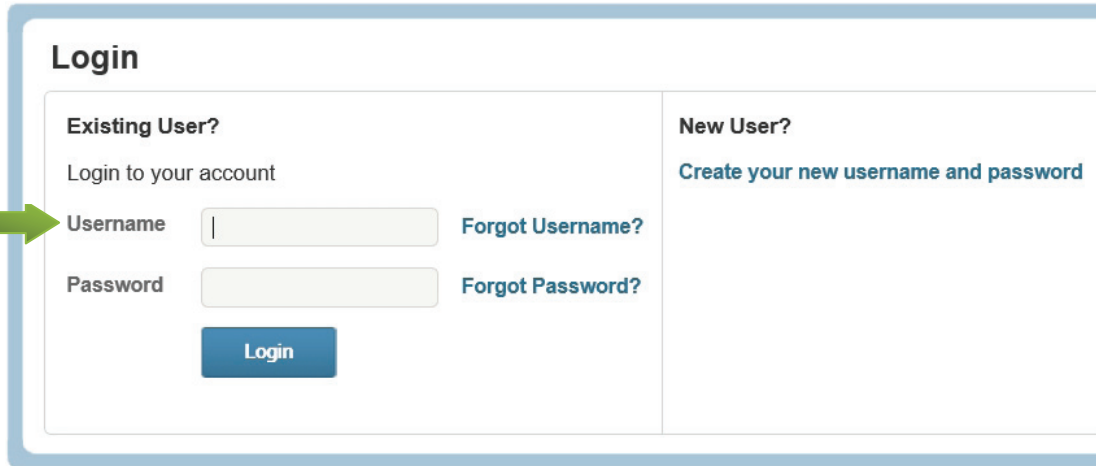
WWW.CHARD-SNYDER.COM

Access Your Account

To file claims online, you will first need to log in to your account.

- Start by going to www.chard-snyder.com.
- Click the bright blue *Login* button in the upper right corner of the page.
- Your default user name is your social security or employee ID number, no dashes.
- Your default password is the last four digits of your social security or employee ID number.
- You will be asked to answer security questions and can change your user name and password after the first time you log in.
- If you have forgotten your Username or Password, please click on 'Forgot Username' or 'Forgot Password' links and follow the instructions to reset.
- If you have forgotten your security answers, please call Chard Snyder Customer Service at 800.982.7715 and they will be able to reset your security questions. They will not be able to tell you your Username and Password.





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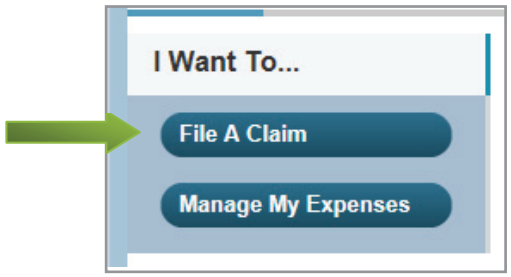
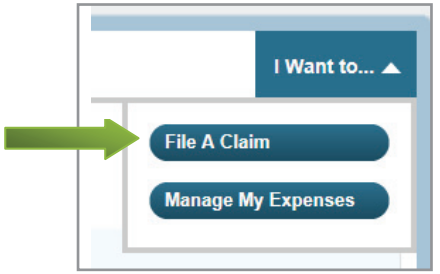
Getting Started

On almost every page in the portal, you can find the *I Want To...* quick links. On some pages, like the *Home* tab, it is prominently displayed near the top of the left hand column. On most other pages you will find an *I Want To...* drop-down box in the upper right hand corner.

Use the *File A Claim* button to begin.





If you have any questions, please contact Chard Snyder Customer Service at:

513.459.9997 or 800.982.7715
askpenny@chard-snyder.com
www.chard-snyder.com

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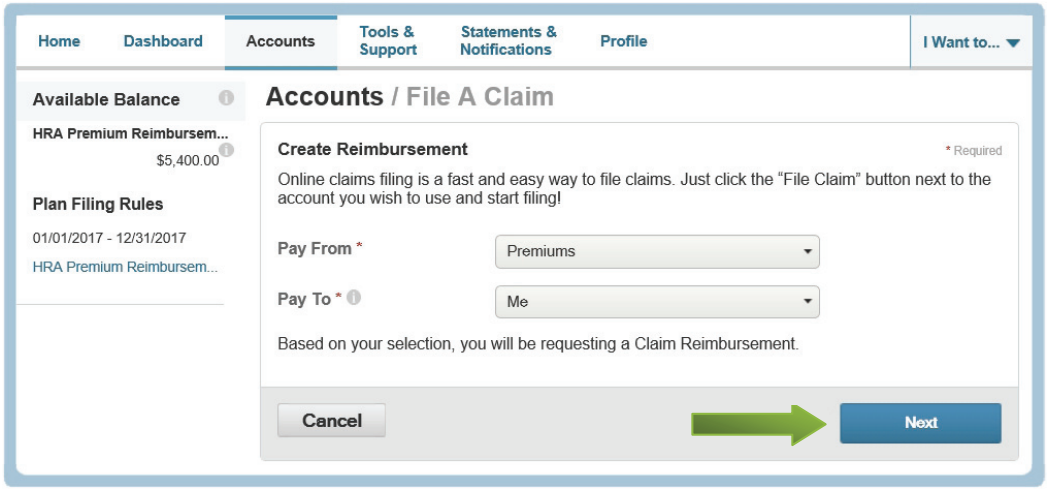
Step 1—Create Reimbursement

The Create Reimbursement screen will default the Pay From field to 'Premiums' and the Pay To field to 'Me'. Leave these default settings as they are.

Please click on the button on the lower right of the screen that says 'Next'.



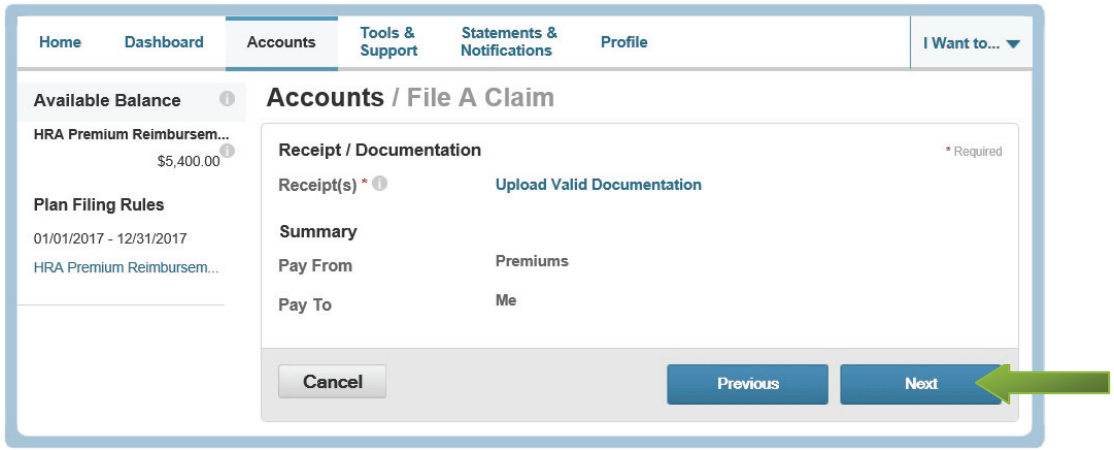
Step 2—Upload Documentation

Click on 'Upload Valid Documentation' to upload your premium statements. Please file separate claims for each type of premium.

Statements must be in a JPG, GIF, PNG or PDF format and cannot exceed 2 MB.

Click on the 'Submit' button after browsing and attaching required documentation.

When you return to the File a Claim screen, click the 'Next' button to continue.



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Step 3—Claim Details

Start Date of Service: Please enter the first of the month that your premiums will start during the available plan year. Please note that if you enter a date outside of the available plan year, we cannot reimburse your claim.

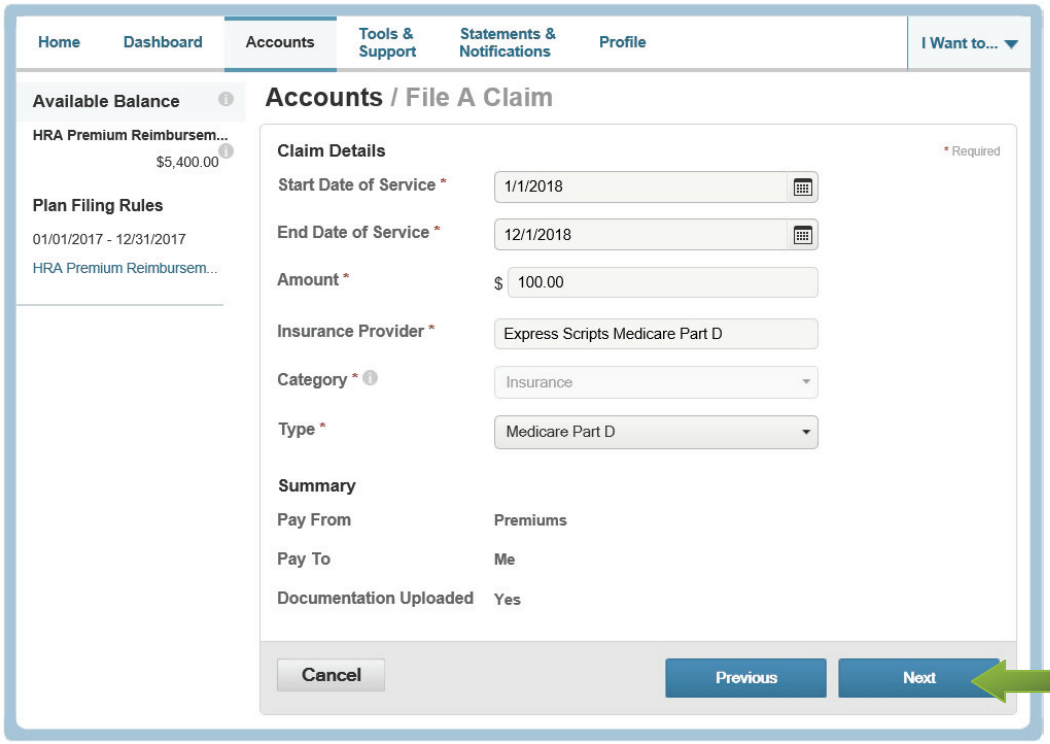
End Date of Service: Enter the first of the month of the **last month** your premium will be incurred. If you are requesting a full year of benefits, please use 12/1/2018 as your 'End Date of Service'.

Amount: Enter the amount you would like to be reimbursed **for each month**. For example, if a monthly Premium Amount for Medicare Part D plan is $100.00, please enter $100.00.

Category: The Category field will always default to Insurance.

Type: Use the drop down arrow to select the type of premium for which you are requesting reimbursement. Again, please remember to enter one recurring claim for each premium type for which you are requesting reimbursement.

After you have entered the claim details, click on the 'Next' button located in the lower right of your screen to continue.



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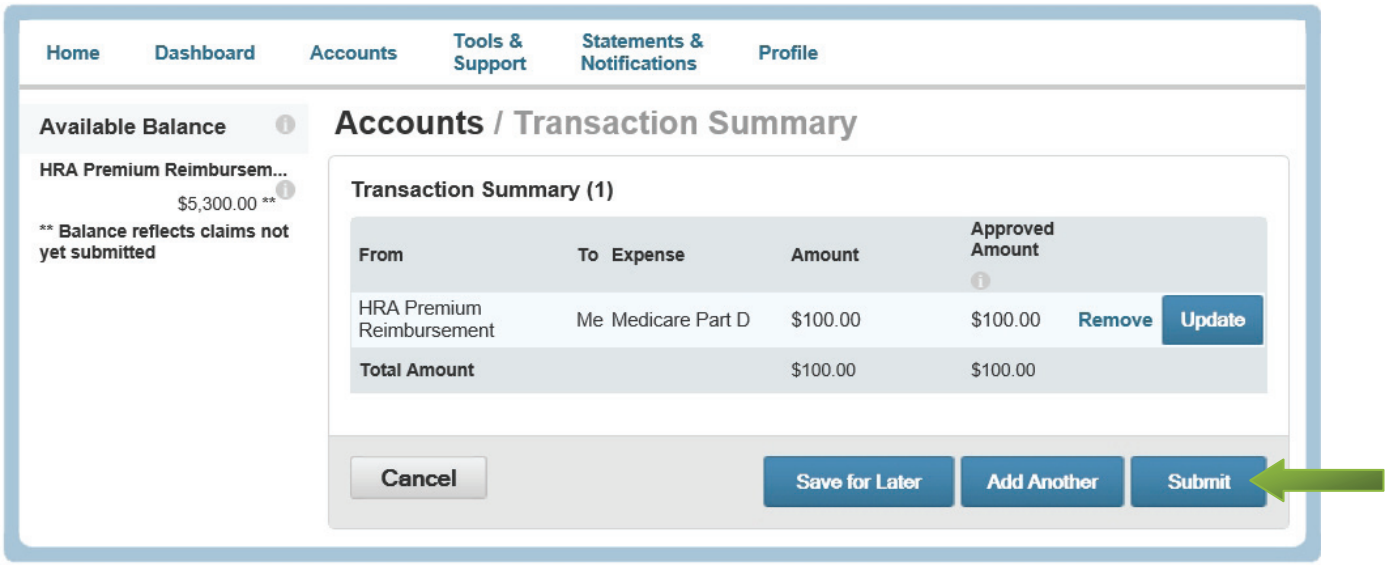
Step 4—Transaction Summary

You will then be given a summary screen on which you can choose to file another claim or click on 'Submit' to file the claim for which you have already uploaded documentation.



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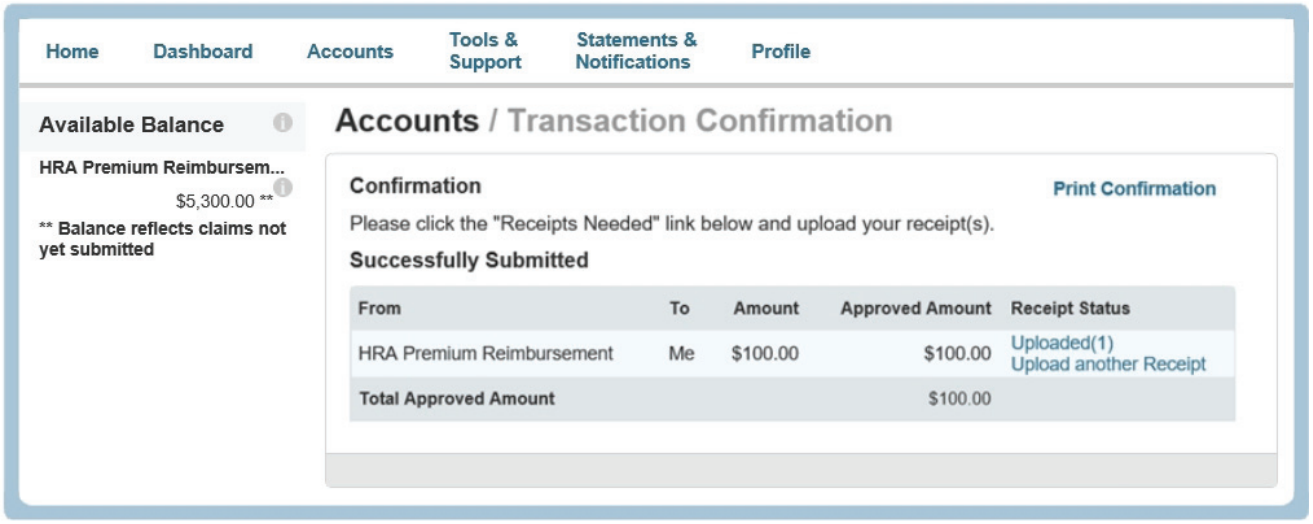
Step 5—Transaction Confirmation

Please make sure the final page states 'Confirmation' at the top. If it does, you have successfully filed a 'Recurring Premium Claim'.



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