



# Getting to know your Omnify Visa

Having a Visa® card tied to your flexible spending account (FSA) means you don't have to come up with out-of-pocket dollars to pay for your FSA-eligible purchases. There may be times when we can't verify that your card was used for an eligible expense; when this happens, we'll send you an email asking for documentation and providing further instructions.

## How to upload documentation for a Visa transaction


### Option 1: Through the online portal

Log into your account at [omnifybenefits.com](https://omnifybenefits.com). From your personal dashboard, you will see a list of all transactions that need documentation. Simply select **Add Receipt** to attach the documentation.

### Option 2: Through the Omnify app

Log into the Omnify app. An alert will appear for any claim needing documentation. Select **Add Receipt**, and you will then be prompted to take a new photo or add one from your photo library.

## What information needs to be provided?

1. Patient name
  2. Date of service or purchase
  3. Provider's name
  4. Description of service or item purchased
  5. Dollar amount of service
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# Helpful hints for using your Omnify Visa

Still getting to know your Omnify Visa? Here are some helpful tips to help you optimize your Visa usage.

## How long do I have to get documentation to Omnify?

We understand that you may not have your documentation available the moment you swipe your Visa card. You will be notified the day after your Visa transaction if documentation is needed. We will send out another reminder email after day 30. At day 60, you will receive another reminder, and your Visa card will be deactivated until documentation is provided.

## What is a balance due?

If you have a Visa transaction over 90 days old and have yet to provide sufficient documentation, we ask that you pay your FSA plan back. This amount is reported as a Balance Due. You are able to pay your balance due via the online portal or the app.

## Visa transaction after your plan year has ended

Be cautious if you are in your new plan year and trying to spend dollars from your previous plan year. When you use your Visa, the card swipe date will tell our system which plan year to debit. So if your new plan year has begun, and you are trying to use the funds from the previous plan year, it's best to pay out-of-pocket and submit a claim for reimbursement.

