

# Reimburse an Eligible HSA Expense



If you paid for an eligible healthcare expense out-of-pocket, you can reimburse yourself from your HSA by filing a claim through the Alpine website or mobile app.

Why would you need to reimburse yourself from a benefits account? Here are a few examples:

- You did not have your Alpine Benefit Card with you at the time of service and had to use another payment method.
- You did not have enough funds in your account to cover the eligible expense.
- Your funds were in the process of being transferred and were not available to you at the time of service.

## Filing for a Reimbursement: Desktop Version

- 1 Log in to your personal account summary online. To create an account, visit [www.alpinetpa.com](http://www.alpinetpa.com), click Benefits Login and follow the prompts.
- 2 Hover over the 'Accounts' tab. Under 'I Want To,' click 'Make an HSA Transaction.'
- 3 First, select the benefit account from which you are requesting a reimbursement from the top 'Select an account' dropdown.
- 4 Next, select 'Me' from the bottom 'Select an account' dropdown.
- 5 Click 'Add a Bank Account' to submit for a direct deposit, or click 'Next' to request a check. The direct deposit option is free to use, and there is a \$10 fee to receive a check.
- 6 Select One-Time Transaction or Schedule.
  - *To set up a one-time transaction, select "One-Time," then click 'Next.'*
  - *To set up a one-time transaction in the future, select the "Schedule" option and set the end date of the schedule such that there is only one occurrence. The start date and end date will be the same.*
  - *To set up automatic scheduled transactions, select the "Schedule" option and set the frequency accordingly.*
  - *Click 'Next.'*



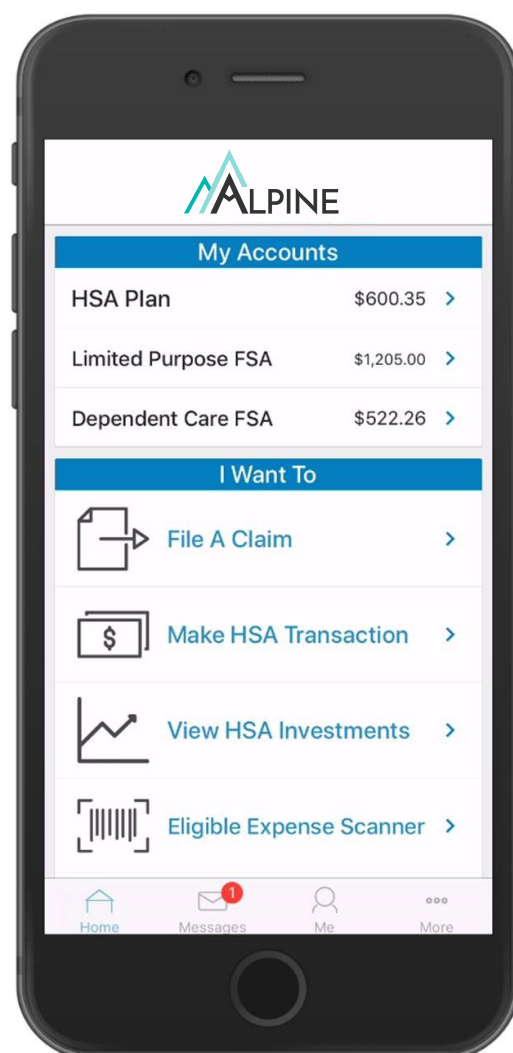
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- 7 Specify the amount requested for reimbursement.
- 8 From the 'Select an expense category,' choose the category of out-of-pocket expense.
- 9 Under Recipient/Patient, select the person who received the service. Add any relevant notes about the service or product purchased. Click Next.
- 10 Review the 'Transaction Summary,' check the box signifying you agree to the terms of use, then click 'Submit.'
- 11 Approved claims are reimbursed within days via check or direct deposit.

## Filing for a Reimbursement: Mobile Version

- 1 Log in to the Alpine mobile app. To create an account, visit [www.alpinetpa.com](http://www.alpinetpa.com), click Benefits Login and follow the prompts.
- 2 From the home screen, select 'Make HSA Transaction.'
- 3 From the 'Select an account' dropdown, select 'Me.' Click 'Next.'
- 4 Under Transaction Details, specify the reimbursement amount requested.
- 5 Under 'Expense,' select the category of out-of-pocket expense.



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**6** Under 'Recipient/Patient,' select the person who received the service. Add any relevant notes about the service or product purchased.

**7** Select One-Time Transaction or Schedule.

- *To set up a one-time transaction, select "One-Time," then click 'Next.'*
- *To set up a one-time transaction in the future, select the "Schedule" option and set the end date of the schedule such that there is only one occurrence. The start date and end date will be the same.*
- *To set up automatic scheduled transactions, select the "Schedule" option and set the frequency accordingly.*
- *Click 'Next.'*

**8** Review the 'Transaction Summary,' check the box signifying you agree to the terms of use, then select 'Submit.'

**9** Approved claims are reimbursed within days via check or direct deposit. The direct deposit option is free to use, and there is a \$10 fee to receive a check.

