

# ACCESSING YOUR ACCOUNT FUNDS



## USING YOUR SURENCY FLEX ACCOUNT HAS NEVER BEEN EASIER

*It sure is easy.*

Your **Surency Flex Benefits Card** is a special-purpose Visa® Card that gives you an easy, automatic way to pay for eligible expenses. The Benefits Card lets you electronically access the pre-tax amounts set aside in your Surency Flex accounts. Use it when paying for eligible expenses at a provider or merchant that accepts Visa Cards and uses an inventory control system. These transactions may be automatically substantiated, meaning you don't have to file a claim and may not have to submit a receipt. However, always keep all documentation for tax purposes or in case Surency requests further documentation. **KEEP YOUR CARD!** If you have an account next year, you will be able to continue to use the same Surency Flex Benefits Card. We will issue you a new one when your current card expires.



### HOW TO USE YOUR BENEFITS CARD

- Have the cashier ring up all of your items together.
- When it's time to pay, swipe your Surency Flex Benefits Card first. Select 'credit' and sign for your purchase. *Optional: In addition to your signature, you can set up a PIN number to access your funds by calling 866-898-9795. If you have a PIN number, select 'debit' and enter your PIN.*
- All eligible expenses will be paid for from your account and deducted from your total.
- If you are purchasing non-eligible items, you will need to have a second form of payment available for those items.
- Keep your receipts in the event that further validation is needed.

### DID YOU PAY OUT-OF-POCKET FOR AN ELIGIBLE EXPENSE?

Submit a claim to get paid back using money from your account. There are three ways to submit a claim:

- 1. SURENCY FLEX APP**  
Download the Surency Flex mobile app and submit the claim by taking a photo of your receipt.
- 2. MEMBER ACCOUNT AT SURENCY.COM**  
Log in to your Member Account at Surency.com to upload your receipt.
- 3. PAPER CLAIM FORM**  
Visit Surency.com to download a paper claim form. Complete and return to Surency.

Sign up for Direct Deposit so that after you submit a claim, Surency will automatically deposit those dollars back into your bank account. There are two ways to set up Direct Deposit:

- 1. MEMBER ACCOUNT AT SURENCY.COM OR VIA THE SURENCY FLEX MOBILE APP\***  
Log in to your Member Account at Surency.com or use the Surency Flex mobile app to input your bank account information. Adding your bank account information through either your Member Account or mobile app is quick and simple, your account will be automatically verified through a secure process.  
  
\*Recommended best practice
- 2. PAPER DIRECT DEPOSIT FORM**  
Visit Surency.com to download a Direct Deposit form. Complete and return to Surency. *Please note, if you submit your bank account information via the paper form, further action is required in order to successfully activate direct deposit with Surency Flex. After your completed form has been received by Surency Flex, you will be required to manually verify your bank account through your Surency Flex Member Account or the Surency Flex mobile app. More information on this verification process is provided on the Direct Deposit form.*

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