



Participant Website Instructions

Account Login

- Navigate to www.swerdlin.net.
- Go to “Account Login” and select “Participants” to access your account.
- **DO NOT** select New User. Instead enter your full Social Security Number (no spaces or dashes) for the username and the last four digits of your Social Security Number for your password.
 - *Please note, you will be prompted to change your username and password after logging into the website.*

Dashboard

- **Account Summary**
 - **Benefits** - View your available balance, declared amount, YTD deposits, YTD claims submitted, YTD payments and any fees or adjustments.
 - **Personal Info** - Access and edit your personal information and recent claims.
 - **Recent Claims** – See your most recent claims, claim status and payment detail.

Your Benefits

- A summary of your benefits with Swerdlin & Company.

Claims Tab

- **Claim Entry** – Submit claims for reimbursement.
 - Under “Select Benefit”, select the account that you are submitting the claim to.
 - Under “Start date of service”, enter the date of service you incurred the claim (not the date that you paid the claim).
 - Under “End date of service”, this will be the same as the “Start date of service” date.
 - If you have entered dependent information, you can choose the dependent that the claim applies to under “Person receiving service”.
 - If you would like to indicate what type of service provider the claim was incurred at, you can use the drop down under “Service provider”.
 - The “Taxpayer ID or SSN” field is only required if you are submitting a Dependent Care claim. This field will be grayed out if Dependent Care is not the selected benefit.
 - If you would like to enter a description of the claim, you can enter this under “Description”.
 - Enter the amount of the claim under “Amount”.
 - Click on the “Add” button.
 - If you are entering more than one claim, you can enter it on this page and click on the “Add button”.
 - Once you are finished entering your claims, click on “Continue” under “Added Claims” at the bottom of the screen. You will be taken to a page that asks if you would like to submit claim



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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 to submit claim forms and receipts via fax or email, you will need to print out the claims confirmation page and send it to Swerdlin & Company along with the documentation for the claim.
- If you choose to submit claim forms and attachments online, click “Continue” and you will be taken to a page to upload your attachment(s).
- In order to upload your attachments, click the “Add Attachment” box and then click the button entitled “Add”. Go to the bottom of the page under “Attachments” and click “Add Attachment” again.
- Click on “Browse” to locate the appropriate file and click “Submit” on the bottom of the screen.
- If you have uploaded your attachment(s) correctly, you will receive a message that states your attachments have been successful submitted and will receive a confirmation ID.
- **Claim History**
 - View your claim history and status. You have the ability to filter your results by choosing the plan year, benefit type (Health Reimbursement, Dependent Care, Transit, Limited Purpose FSA, etc.), dependent and date range.
 - If you have entered a claim online and need to upload documentation at a later time, you may do this by clicking on the “Claim ID” next to the applicable claim.
- **Payment History**
 - History of payments made to you for your claim reimbursements. There is a search engine available to locate specific payments.
- **Transaction History**
 - View your transaction history, by date, type (payments, fees, payroll contributions) and amount.
 - You have the ability to filter your results by choosing the plan year, benefit type (Health Reimbursement, Dependent Care, Transit, Limited Purpose FSA, etc.) and transaction type.

Benefits

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

Contact Us

- **General Information**
- **E-mail Employer** – This will send an email to Swerdlin & Company.



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My Account (on top right of screen)

- **Personal Info.** – allows you to view and edit personal information, as well as setting your security question.
- **Password Change**
- **Dependents** – add and/or edit your dependents
- **Submit a Claim**
- **Forms**
- **Reports** – allows you to view your monthly FSA statements.
- **Direct Deposit** – allows you to view and edit direct deposit account information.

**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.*