



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.**
 - Username:** your full Social Security Number (no spaces or dashes).
 - Password:** enter the last four digits of your Social Security Number.
- You will be prompted to create a new username and password:

Username Criteria:

- Must be between 6-12 alphanumeric characters (0-9, A-Z).
- Must contain at least one non-numeric character.
- Cannot be the same as your Social Security Number.

Password Criteria:

- Must contain at least one non-numeric character (cannot be numeric only).
- Cannot be the same as your Social Security Number.
- Cannot be any portion of your username.
- Should not contain your username, real name or company name.

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

● Claim Entry

- **Select Benefit:** select the account that you are submitting the claim to.
- **Start date of service:** enter the date of service you incurred the claim (not the date that you paid the claim).
- **End date of service:** this will be the same as the Start date of service date.
- **Person receiving service**
- **Service provider**
- **Taxpayer ID or SSN** field is only required for Dependent Care claims. This field will be grayed out if Dependent Care is not the selected benefit or if it is not required.
- 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 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.



SWERDLIN & COMPANY

ACTUARIES AND EMPLOYEE BENEFITS CONSULTANTS

- 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).
- 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 (adjustments, fees, payments, 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.

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.

The Swerdlin Call Center is available to assist you with website transactions from Monday - Friday 8 a.m. to 5:30 p.m. ET. You may contact a customer service representative by calling (866) 687-4015 (Choose option 2) or by emailing flex@swerdlin.net.