

## ***Here are the steps for the employee to make his own reimbursement request:***

- Log in to view HSA account either via [hsatoday.com](http://hsatoday.com) or [www.burfootinsurance.com](http://www.burfootinsurance.com) (Employee will need to go through the first time registration if he has not already done so.)
- Click on the “HSA~~Today~~” tab
- Look in the left hand menu and click “Request Withdrawal”
- From here they can choose to make a withdrawal and/or enter expense information from a receipt or EOB

The “Request a Withdrawal from your Account Now” option will allow him to request a dollar amount from his available funds without having to enter expense information. He will need to enter the amount and choose his method of payment (check or EFT). (For cases when the employee has claims in the claims vault and would like to make requests against the total amount vaulted.) These types of requests are automatically self-attested and require no PSP Certification or release.

The “Enter Expense Information into the Claims Vault first and then Withdraw Money” option does just that. It allows the employee to enter expense information from a receipt or EOB to either be vaulted for later requests or to be requested immediately. If the employee wishes to make an immediate request, they will need to make sure they go through ALL of the steps, enter a dollar amount for the request and choose their method of payment (check or EFT). If they fail to do so, the claim will simply be vaulted and no money paid out. The employee will be able to either self-attest the claim or request PSP Certification. If the employee requests PSP Certification, the PSP will need to view, certify, then release the claim before it can be paid out. (This can be done under the “Enter Requests” screen.)

Please let me know if I can be of further assistance.