HOW TO REIMBURSE YOURSELF FROM YOUR DCRA

For a dependent care reimbursement account (DCRA), many providers do not offer receipts. You can request reimbursement via the DCRA Reimbursement Form and include the provider's signature as documentation.

To Reimburse Yourself:

1. Under the 'Claims & Payments' tab of the HealthEquity member portal, click 'Add Claim.'
2. Select the account you would like to be reimbursed from and click 'Next.'
3. Select 'Reimburse Me' and click 'Next.'
4. Choose the expense type ('New' or 'Existing').
5. If it is a new expense, enter the required 'Record Keeping Information' and click 'Next.'
   - Provider name
   - Name of person who incurred the expense
   - Date expense was incurred
   - Claim type
   - Claim details
6. Enter the amount to be reimbursed.
7. Select the 'Reimbursement Type' and click 'Next.'
   - Mail me a check
   - Electronic deposit into a bank account
8. Review the claim information, check the box that you authorize the reimbursement and click 'Submit.'

DCRA: You must also add documentation that details your expenses.

To Add a Document:

9. Select 'Upload New Image.' If you have uploaded the image to the documentation library already, you can choose 'Link Existing Image' and select it from the list that appears.
10. Click 'Choose File' and select the document from a location on your computer.
11. Enter the date of the document and document type. You can also enter any notes to support your claim.
12. Check the box to confirm your document and click 'Submit.'

Setting up Direct Deposit:

If the member chooses Electronic deposit into a bank account and have not already added their banking info, below are the steps for that.

Your banking information should be added to the member portal to utilize the Reimburse Me option and have funds deposited in 2 – 3 business days.

The steps to add your bank account information are listed below:

1. Member must log into the member portal.
2. Open the My Account menu, select Profile, then Profile Details.
3. In the External Accounts section, click the **Add/Edit** button.
4. Click the **Add New** button.
5. Enter required account information:
   - Reference name for account
   - Routing number (should be 9 digits) - repeat for verification
   - Account number - repeat for verification
   - Account type - select "checking" or "savings"
   - Financial institution - name required (address, city and zip code optional)
   - Account purpose
     - No verification - can only be used for reimbursements
     - Verified account - can be used for reimbursements, contributions, and/or to send payments to providers via the external account (requires 2-3 business days for verification)
6. Click Authorize.
7. A pop-up will confirm the authorization for the account (credits and debits if verified,credits only if not).
8. Click OK to complete the process. Once the trial deposit is confirmed, in 24 hours you can submit a claim for reimbursement.