

Benefits Checklist

Make your benefits work for you. Use this checklist to get set up, stay organized, and get the most value from your benefits throughout the year.



Log in or set up your online account

Go to www.wexinc.com, select **Login** → **Benefits Accounts**, and choose **Participant Accounts**. Sign in with your existing credentials or follow the new user steps to create your account.



Download the mobile app

Use the WEX benefits mobile app to view balances, upload documentation, get reimbursed, and scan items for eligibility on the go.



Set up direct deposit

Add your bank information to ensure fast, automatic reimbursement of approved claims.



Enable mobile payments

Add your benefits card to your mobile wallet so you can tap and pay at eligible merchants.



Turn on notifications

Visit the **Message Center** → **Update Notification Preferences** to choose the alerts you want to receive – stay updated on claims, contributions, payments, and card activity.



Review your plan rules & details

Go to **Accounts** → **Account Summary** for an overview of your plans, balances, and plan rules for the new plan year.



Explore what's eligible

Check out our interactive list of eligible expenses at www.wexinc.com/insights/benefits-toolkit/eligible-expenses/ to see which products and services qualify under your plan.



Explore knowledgebase

Log in to access our searchable library of help articles and quickly find answers to common questions. It's your go-to resource anytime you need support.



Shop eligible products online

Use your benefits funds at the [HSA Store](#) or [FSA Store](#) to easily purchase eligible products.