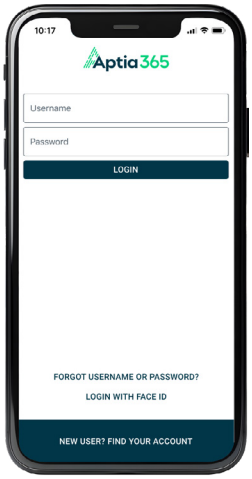
Guide to the Accounts Aptia Mobile App

Downloading the Mobile App

The Accounts by Aptia365 mobile app can be downloaded for free on Android or Apple devices. Search for "Accounts by Aptia365" to locate the app in your phone's online store.

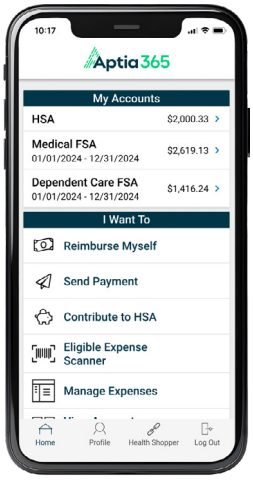
Logging In

When the app is opened for the first time, you will need to enter the username and password for your Aptia online account. After you have successfully logged in to the mobile app for the first time, you will be prompted to set up a four-digit PIN. You'll also have the option to set up logging in with your thumbprint. From that point forward, you'll be able to access the mobile app either by entering this PIN or by using your thumbprint.



The Home Screen

From the app's home screen, you will see options to file a claim, review and pay expenses or get a quick view of your account information. You'll also see an "All Accounts" section that lists the plans you are currently enrolled in, along with plan dates and balance information. To access more details about individual plans, simply tap the name of the plan that you wish to learn more about. If you click on a plan from the home screen, you will be brought to the "Account Details" page, where you can access current plan balance, plan dates and claim history.



The Menu

The menu bar is located at the top of the screen on Android devices and the bottom of the screen on iOS systems, and it is visible from any page of the mobile app. From the menu, you can access your home screen, the message center, your personal profile, Aptia contact information, app settings and logout capabilities.

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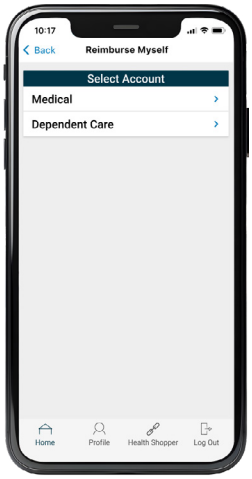
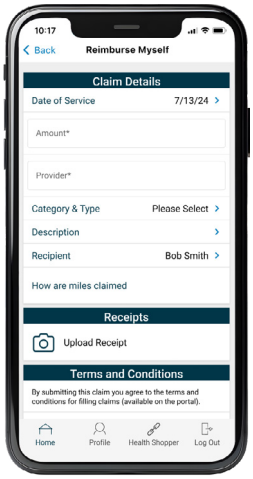
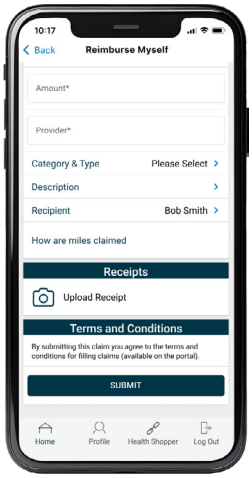
Claim Filing

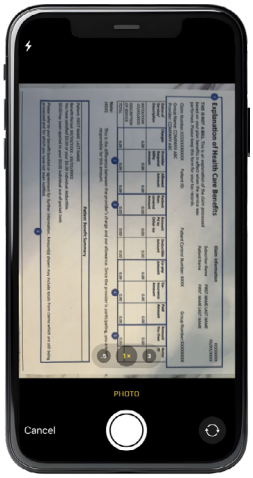
To file a new claim for reimbursement, simply tap the “Reimburse Myself” option from the home screen. If you have multiple accounts, you will be asked to select the account from which you’ll be requesting payment





After selecting the appropriate account for your claim, you will be directed to a screen where you can enter your claim details. Scroll down on this screen to upload the itemized receipt associated with your claim.



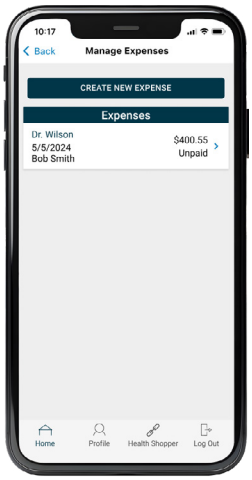


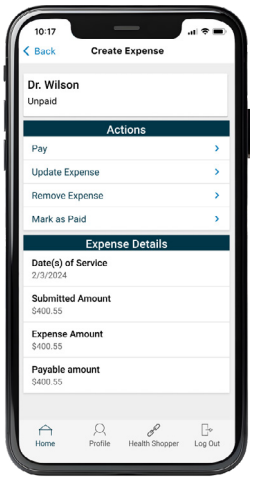
When you select the “Upload Receipt” option, the camera on your device will automatically activate to allow you to take a picture of your documentation, or you may upload a picture from your camera roll.

Once you have successfully captured or uploaded a photo of the documentation, your claim will be submitted for processing.

Dashboard

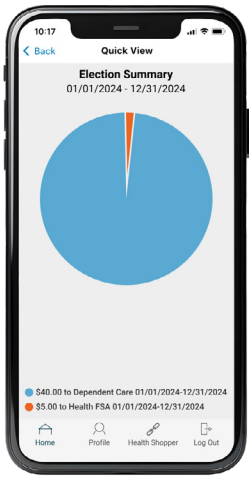
To access your expenses, tap the “Manage Expenses” option from the home screen. You will then be directed to the Dashboard screen, where you can track relevant expenses and save the associated documentation. The Dashboard allows you to add expenses for record keeping purposes. You can also pay out expenses from this screen.





Quick View

To access a quick view of your account details, tap the “View Account Snapshot” option from the home screen. The Quick View screen will provide you with basic information about your claims, elections and contributions. To see additional charts, you will need to swipe right from the “Paid Claims By Category” screen.



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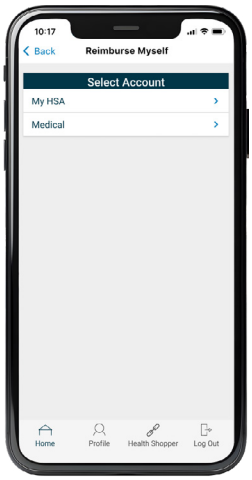
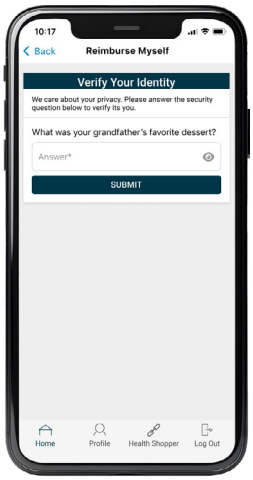
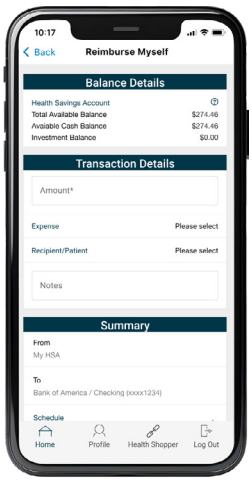
HSA Distributions

To request a new HSA Distribution, simply tap the "Reimburse Myself" option from the home screen.

After selecting the "Distribution" option, you will be able to choose your reimbursement method from the drop-down menu. Once you have selected your reimbursement method, tap "Next" to continue with your distribution. You will then be prompted to answer a security question and directed to a screen where you can enter your transaction details.

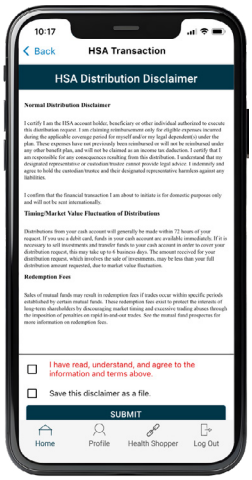






Once you have entered your transaction details, tap "Next" to read and agree to the HSA Distribution Disclaimer.

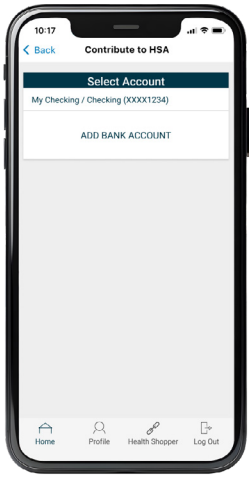
To agree to the disclaimer and submit your request, tap "Agree & Submit." A confirmation will appear once your transaction has been successfully submitted.

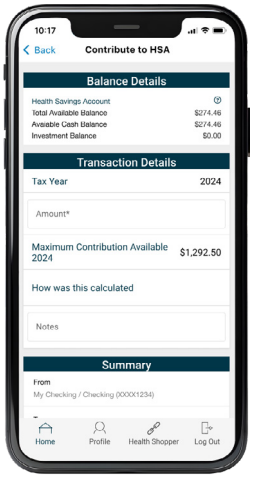


HSA Contributions

To add a contribution to your HSA from the mobile app, simply tap the "HSA Transaction" option from the home screen.

After selecting the "Contribution" option, select the account you would like the contribution to come from. Once you have selected the appropriate account, tap "Next" to continue with your contribution. You will then be directed to a screen where you can enter your transaction details.





Once you have entered your transaction details, tap "Next" to read and agree to the HSA Contribution Disclaimer. To agree to the disclaimer and submit your request, tap "Agree & Submit." A confirmation will appear once your transaction has been successfully submitted.

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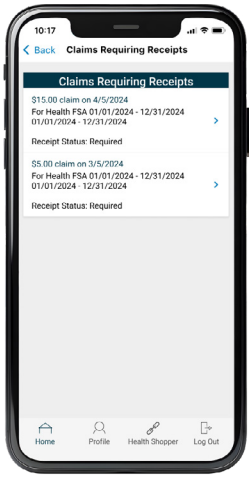
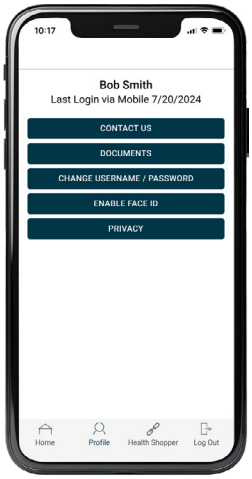
Message Center

To access your Message Center, tap the envelope icon on the app's menu bar. If you see a red notification next to the envelope icon, this means you have one or more messages waiting for you in the Message Center. Your Message Center is where you can go to view claim information and any previously submitted documentation for outstanding claims currently requiring documentation. You can also upload required documentation for your outstanding claims from the Message Center page of the app.



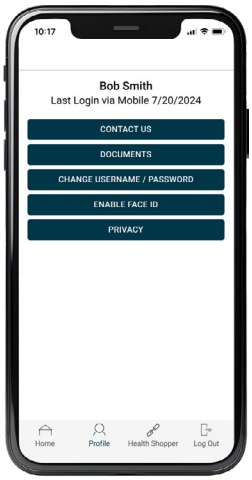
Personal Profile

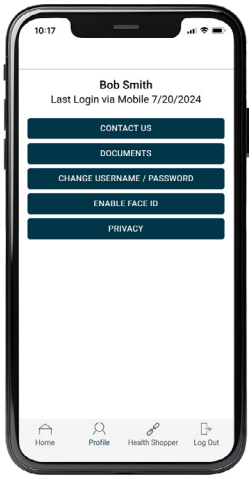
To access your personal profile from an Android device, expand the menu bar at the top of the screen and select "Me." To access your profile from an iOS device, simply click on the icon labeled "Me" on the menu bar at the bottom of your screen. From your personal profile page, you can view the name of the account holder, the date of your last login to the mobile app and any legal documentation available to you.



Contact Information

You'll find the "Contact Us" option in two places in the mobile app — both on the initial passcode screen and on the menu bar at the top (Android) or bottom (iOS) of your screen. Clicking on either of these will direct you to a screen containing the phone number and email address for Aptia's customer service.



Settings

You can access your app's settings by clicking on the gear icon labeled "Settings" on the menu bar. This page is where you can go to change your passcode or see which version of the app you're using.