

Transaction: Create Claim

View: Step 1

Use Case: user has multiple accounts, and an available balance > \$0

Brand Header + User data

Primary Navigation

Secondary Navigation

Print

Transaction name

Step *n* of *x*

Instructional text

Tip to interrupt duplicate transactions

Populate with all user accounts

Populate based on account type selection

**Create Claim**

**Step 1 of 5 – Create Claim Details**

All fields are required unless indicated as optional. If you have an **existing claim** that needs attention, go to the [Claims Overview](#) page.

If you used your YSA card, don't create a claim for the same expense. (You'll be notified if you need to send receipts or documentation for your card transaction.)

**Account Type**  
Health Care ▼

**Type of Expense**  
Medical ▼

**Service Date**  
[month] ▼ [day] ▼ [year] ▼

**Requested Amount**  
[amount]

**Continue** **Cancel**

**[Account Name]**

**Available Balance**  
\$[available balance]

as of [date]

You have [x] claims

As you add claims they'll be listed here

Shopping cart concept: inform the user what their available balance is, on which to base decision on the dollar amount of the claim(s) to be submitted

**ReimburseMe App**  
promo

Promo content at point-of-need: this facilitates claim submission at time of service