

How to set up the WEX benefits mobile app

This article outlines how to set up the WEX benefits mobile app to access your benefits plans. To set up your online account, see [How to set up your Benefits online account](#) for instructions.

Note: To watch a video tutorial, [click here](#). 

Important: You must have an email address on file with us to set up your account. If you don't have an email address on file, [contact us](#) for assistance.

To set up the benefits mobile app, complete the following steps:

1. Download the mobile app.

Note: You can download the mobile app for free on Android and Apple devices. Search "WEX" to locate the app in your phone's online store.

2. Open the app and tap "New User? Set up your account" at the bottom of the screen.



3. Provide the required information and tap "Next."

Important: Your information must match what your employer provided to us.

4. Provide the one-time password we'll send to the email address we have on file and tap "Next."

Scenario	Action
You have multiple email addresses, and you're not sure which one we have on file.	Check all your email accounts for the one-time password we sent you.
You don't have an email address on file with us.	You can't complete the process. Contact us to add an email address.


5. Set up your security questions and tap "Next."

6. Set up your username and password and tap "Submit."

Important: If you don't want to change your username, keep a record of the one the system generated for you.

7. Finalize your account setup.

How to enroll online in an HSA, FSA, or commuter benefits

This article outlines how to enroll online in a health savings account (HSA), flexible spending account (FSA) or commuter benefits. Reach out to your employer to verify if online enrollment is available for you. To watch a video tutorial, [click here](#). 

Important

- Your employer has provided important plan details you should be aware of before you enroll. Read that information carefully.
- Some steps may require banking or beneficiary information to complete your online enrollment.

Scenario	Information needed
You want to enroll in commuter benefits through your WEX account.	See How to enroll online in commuter benefits mid-year .
You want to set up direct deposit while enrolling online.	<ul style="list-style-type: none">• Your bank's name and address• Your bank's routing number• Your bank account number
You want to enroll in an HSA and add a beneficiary.	<ul style="list-style-type: none">• Your beneficiary's social security number• Your beneficiary's date of birth• Your beneficiary's address

To enroll online, complete the following steps:

1. Under the I Want To section, click "Enroll Now."

2. Click "Begin Your Enrollment Now."

Note: If you are enrolling in an HSA, review the Summary of Accounts statement and agree to the terms and conditions.

3. Review your personal information, make any needed updates, and then click "Next."

4. For each eligible dependent, complete the required fields and then click "Add to List." After all dependents have been added or if you choose not to add any dependents, click "Next."

Note: Dependent information is not required for commuter benefits. If you have questions regarding dependent eligibility, contact your employer.

5. Check the box for each plan indicating you have read and understood the plan rules, and then click "Next."

6. Type your annual election for each plan in which you want to enroll and click "Next."

Note: Click "Calculate" if you want to see the estimated tax savings.

7. Select a reimbursement method and then click "Next."

Scenario	Resolution
You select the benefits debit card as your preferred reimbursement method.	You can still receive reimbursement via check or direct deposit for services you paid for out of pocket.
The benefits debit card is not offered for your plan.	Select either direct deposit or check as your preferred reimbursement method.
You select direct deposit as your preferred reimbursement method.	1) Type your bank's routing number and click "Find Your Bank." 2) Complete the required fields and then click "Next." 3) Click "Update Bank Account." <u>Note:</u> You will be prompted with a message indicating further action is needed to activate your bank account so you can receive reimbursements there.

8. If you are enrolling in an HSA, complete the required fields, click "Add Beneficiary" and then click "Next."

Note: If you are not enrolling in an HSA, skip to step 9.

9. Review your enrollment information, make any necessary updates and then click "Submit."

10. If you are enrolling in an HSA, read the Creation Authorization, check the required boxes to indicate you want to open an HSA in your name, and then click "Submit Enrollment."

Note: If you are not enrolling in an HSA, skip to step 11.



11. Print the Enrollment Confirmation page for your records. This page verifies that your enrollment is complete.