

Transaction: Create Claim

View: Step 1.1

Use Case: user has multiple accounts, an available balance > \$0, and a use-it-or-lose-it account

Brand Header + User data

Primary Navigation

Secondary Navigation

Print

Transaction name

Step *n* of *x*

Instructional text

Tip to encourage improved result

List all available accounts

Alert to avert non-optimal result

Create Claim

Step 1.1 of 5 – Confirm Claim Details

Review helpful hints based on your choices.

There might be a better option.
Your Health Care Spending Account has \$400.00 to use for eligible expenses this plan year. If you don't use this money by the end of the year, you could lose it.

Health Savings Account (\$[amount])

Health Care Spending Account (\$[amount])

You don't have enough mone in your account for a full reimbursement based on your requested amount.
However you can submit this claim to use your remaining account balance of \$100.00

Requested Amount
[amount]

Continue Back 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