CONSUMER PORTAL QUICKSTART GUIDE: FSA

FSA

Welcome to your Benefit Management Benefit Accounts Consumer Portal. This one-stop portal gives you 24/7 access to view information and manage Your Flexible Spending Account (FSA) and Health Reimbursement Account (HRA). It enables you to:

- File a claim online
- Upload receipts and track expenses
- View up-to-the-minute account balances
- View your account activity, claims history and payment (reimbursement) history
- Change your login ID and/or password
- Download plan information, forms and notifications

The portal is designed to be easy to use and convenient. You have your choice of two ways to navigate this site:

1. Work from sections within the Home Page, or
2. Hover over or click on the four tabs at the top.

HOW DO I LOG ON TO HOME PAGE?

1. Go to the Consumer Portal at **www.benefitmanagementllc.com**

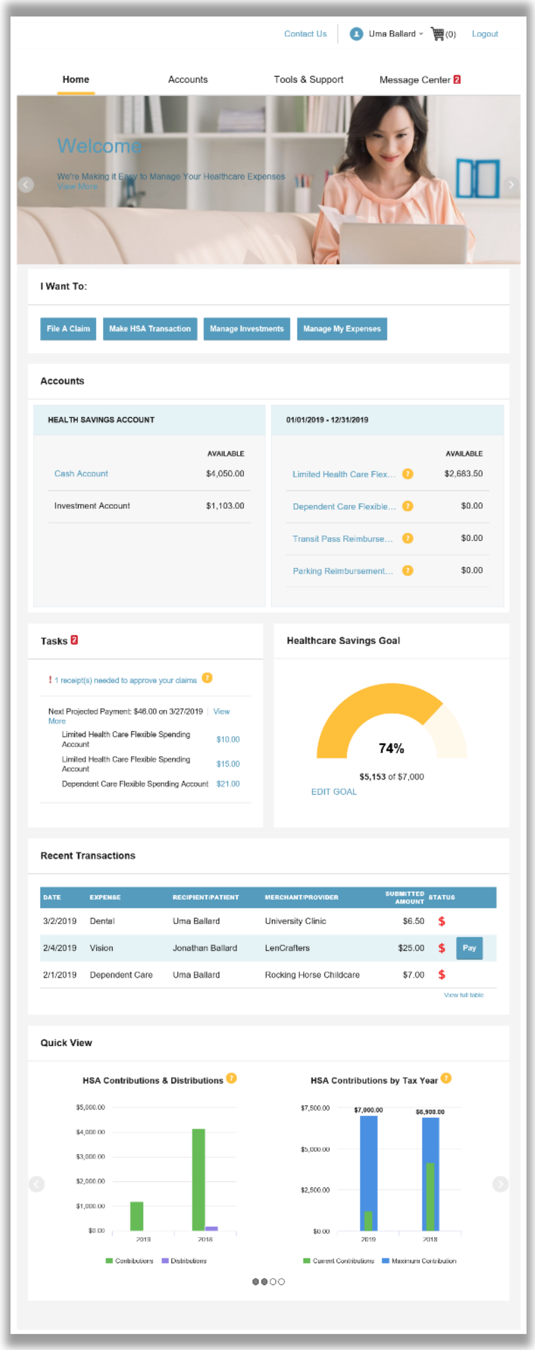
2. **Register Online**:
   - Click “I am a **Member**” at the bottom of the page.
   - On the following page, click “FSA-HRA-HSA Login”.
   - Enter your login ID and password.
   - **If you have never logged on before**, you will need to enter your Login ID, which is your first initial, full last name, and last 4 numbers of your social security number.
     - Example: John Smith = jsmith1234
   - Your temporary password is the same as your Login ID.
     - Example: John Smith = jsmith1234
   - Click **Login**.

   You will be prompted to update your password, complete security questions & sign your Terms & Conditions

The **Home Page** is easy to navigate:

- Easily access the **Available Balance** and **“I Want To”** sections to work with your accounts right away.
- The **I Want To**…section contains the most frequently used features for the Consumer Portal.
- The **Accounts** section links to your Accounts, Investments, and Profile.
- The **Tasks** section displays alerts and relevant links that enable you to keep current on your accounts.
- The **Recent Transaction** section displays the last 3 transactions on your account(s).
- The **Quick View** section graphically displays some of your key account information.

You can also hover over the tabs at the top of the page.



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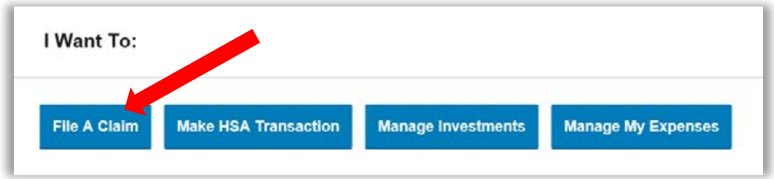
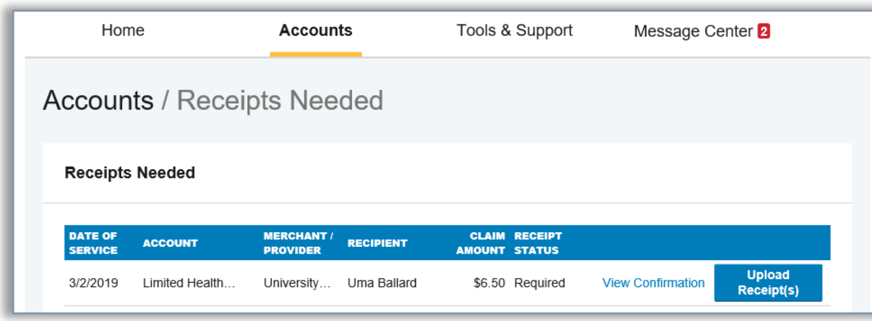
HOW DO I FILE A CLAIM AND UPLOAD A RECEIPT?

1. On the **Home Page**, you may simply select the "**File a Claim**" under the "I want to…" section, **<u>OR</u>** from any page on the portal, expand the **Accounts** tab on the top of the screen.
2. The claim filing wizard will walk you through the request including entry of information, payee details and uploading a receipt.
3. For submitting more than one claim, click **Add Another**, from the **Transaction Summary** page.
4. When all claims are entered in the **Transaction Summary**, agree to the terms and conditions click **Submit** to send the claims for processing.
5. The **Claim Confirmation** page displays. You may print the **Claim Confirmation Form** as a record of your submission. If you did not upload a receipt, you can upload the receipt from this screen or print a **Claim Confirmation Form** to submit to the administrator with the required receipts.



NOTE: If you see a **Receipts Needed** link in the Tasks section of your Home Page, click on it. You will be taken to the **Claims** page where you can see the claims that require documentation. You can easily upload the receipts from this page. Simply click to expand the line item to view claim details and the **upload receipts link.**

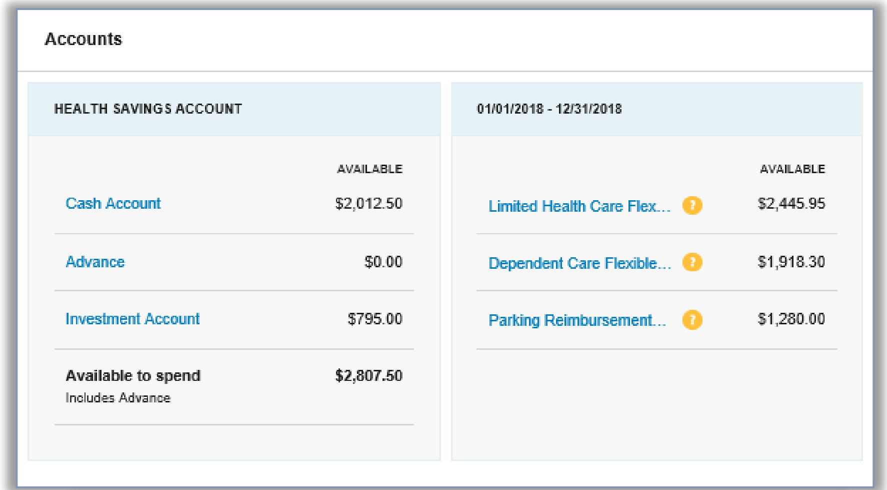


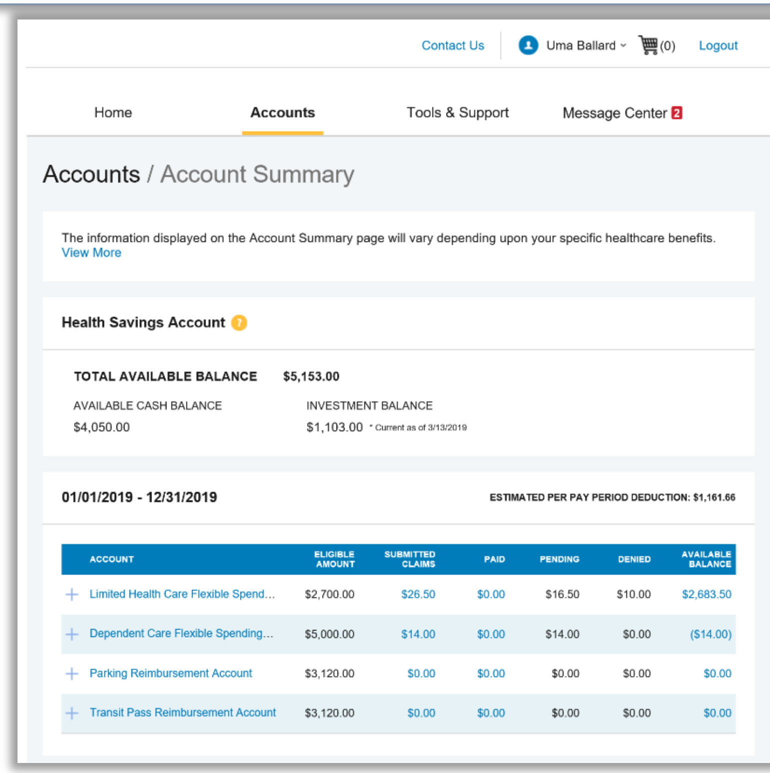
HOW DO I VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY?

1. For current Account Balance only, on the **Home Page**, see the **Accounts** section.

2. For all Account Activity, click on the **Accounts** tab from the Home Page to bring you to the Account Summary page. Then you may select the underlined dollar amounts for more detail. For example, click on the amount under "Eligible Amount" to view enrollment detail.

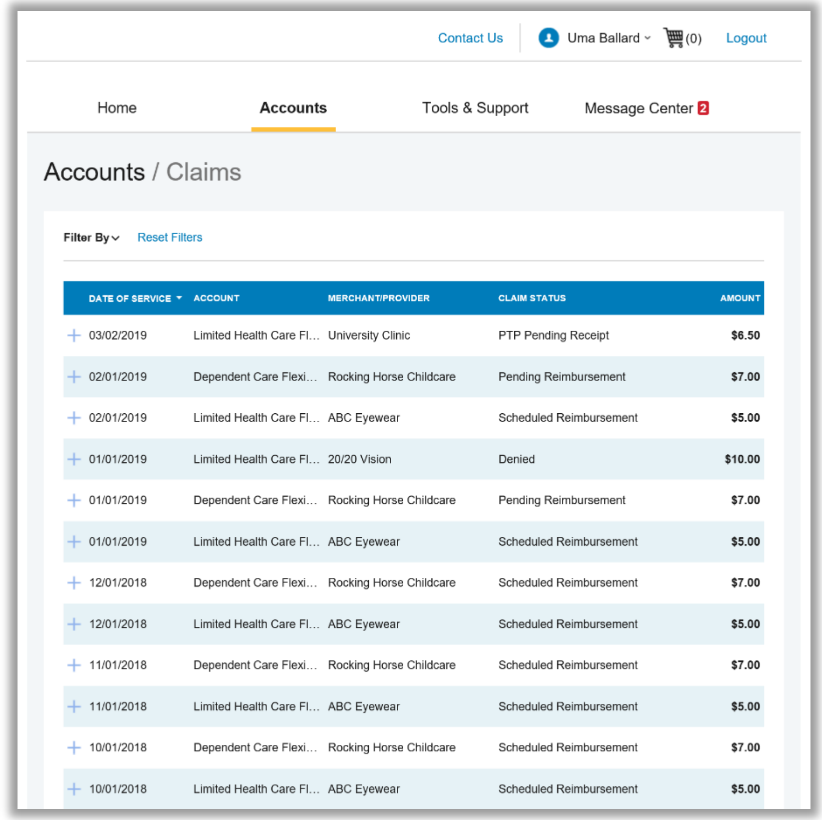
NOTE: You can see election details by clicking to expand the line item for each account.





HOW DO I VIEW MY CLAIMS HISTORY AND STATUS?

1. From the **Home Page**, click on the **Accounts Tab,** and then click on the **Claims** link to see your claims history. You can apply filters from the top of the screen. You can filter by plan year, account type, claim status or receipt status.
2. By clicking on the line of the claim, you can expand the data to display additional claim details.



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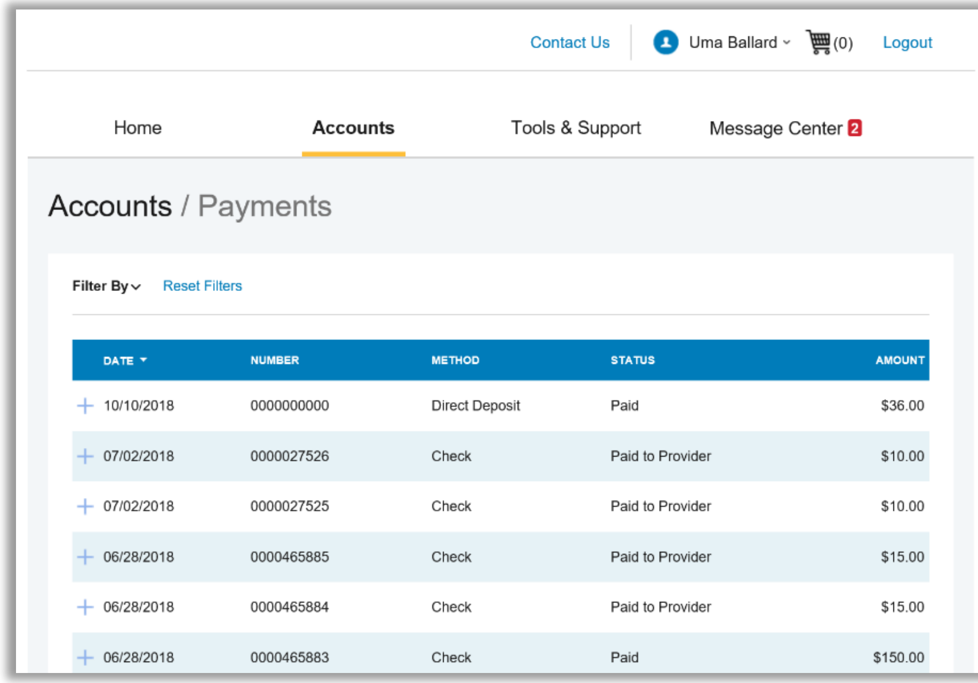
HOW DO I VIEW MY PAYMENT (REIMBURSEMENT) HISTORY?

1. From the **Home Page**, under the **Accounts** tab, click **Payments**. You will see reimbursement payments made to date, including debit card transactions.
2. By clicking on the line of a payment, you can expand the data to display additional details about the transaction.

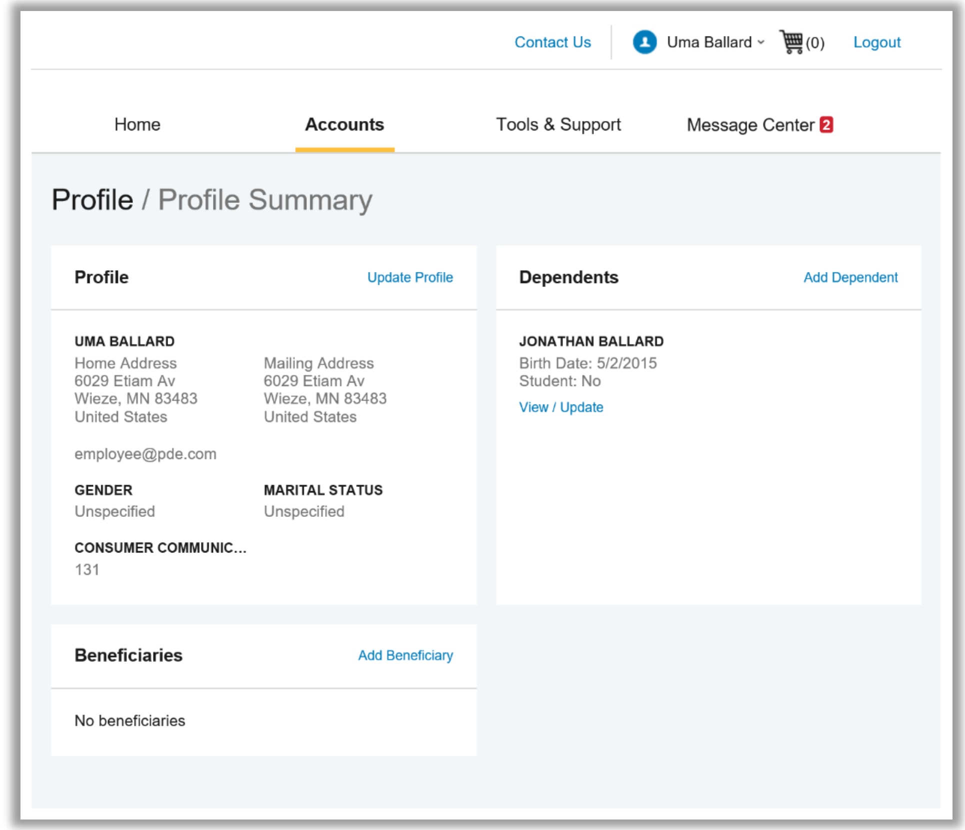


HOW DO I REPORT A DEBIT CARD MISSING AND/OR REQUEST A NEW CARD?

1. From the **Home Page**, under the **Profile,** click the **Banking/**Cards link on the left-hand side of the screen.
2. Under the Debit Cards column, click **Report Lost/**Stolen or **Order Replacement** and follow instructions.

HOW DO I UPDATE MY PERSONAL PROFILE?

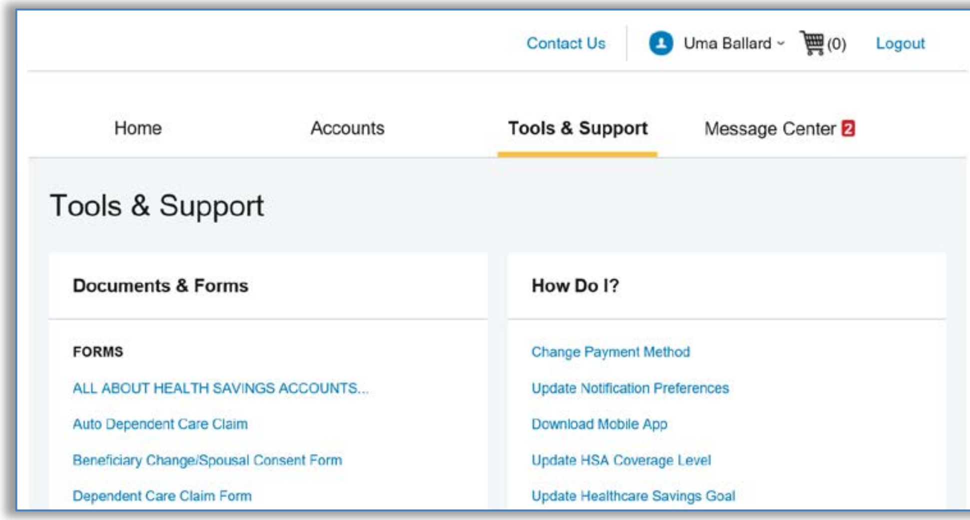
1. From the **Home Page**, under the **Accounts Tab,** you will find links to update profile information including profile summary details, dependents, and beneficiaries.
2. Click the appropriate link under Profile for your updates. Some profile changes will require you to answer an additional security question.
3. Complete your changes in the form.
4. Click **Submit**.



HOW DO I GET MY REIMBURSEMENT FASTER?

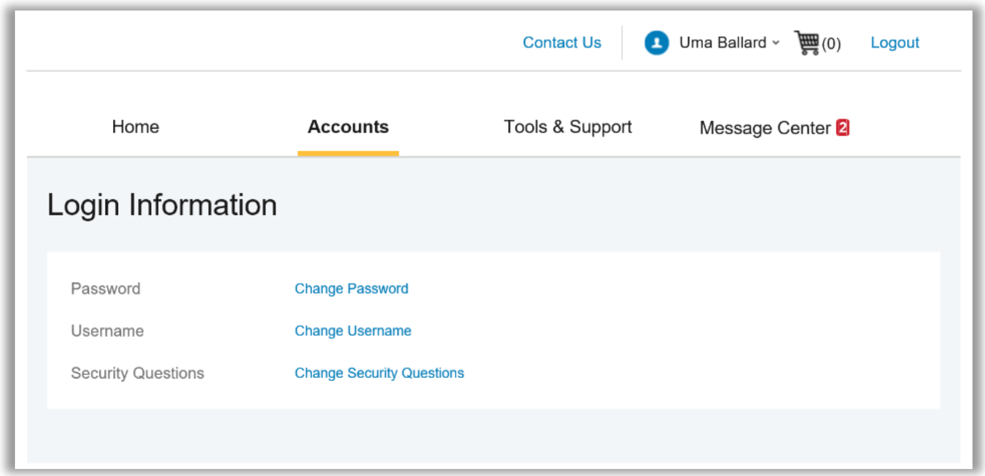
The fastest way to get your money is to sign up online for direct deposit to your personal checking account. Before you begin, make sure that your employer is offering direct deposit setup online.

1. From the **Home Page**, under the **Tools & Support** tab, click **Change Payment Method** under the **"How Do I"** section
2. Select the **Update** for the appropriate plans. The **Payment Method/Update Payment Method** page displays.
3. Select **Reimburse Myself Using Direct Deposit** and **Update Bank Account**.
4. Enter your bank account information and click **Submit**.
5. The **Payment Method Changed** confirmation displays.



HOW DO I CHANGE MY LOGIN AND/OR PASSWORD?

1. From the **Home Page**, click on the **Accounts Tab**, and click **Login Information**.
2. Follow instructions on the screen. (For a new account, the first time you log in, you will be prompted to change the password that was assigned by your plan administrator. Follow the instructions.)
3. Click **Save**.



HOW DO I VIEW OR ACCESS?

…DOCUMENTS & FORMS?

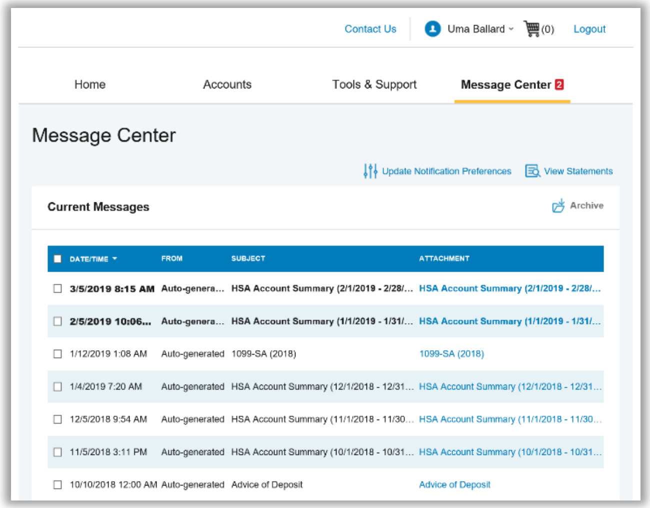
1. From the **Home Page**, click the **Tools & Support** tab.
2. Click any form or document of your choice.

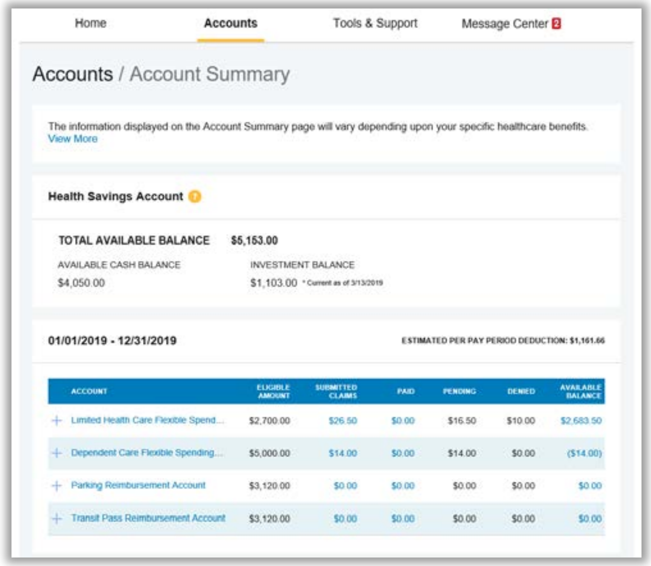
…NOTIFICATIONS?

1. From the **Home Page**, click the **Message Center** tab.
2. Click any link of your choice. You will be able to view and archive current documents, as well as reference documents archived previously.
3. In addition, you can **Update Notification Preferences** by clicking on the link next to Notifications.

…PLAN INFORMATION?

1. On the **Home Page**, under the **Accounts Tab**, you will be directed to the **Account Summary** page
2. Click onto the applicable account name and the **Plan Rules** will open in a pop-up window.
   <u>**OR**</u> from the **Home Page**, under the **Tools & Support** page, you may view **Plan Summaries** for basic information. Then click each applicable plan to see the plan details.





MORE HELPFUL INFORMATION

From the **Home Page**, under the **Tools & Support** tab, you may find links that connect you to helpful information. These may be links to other valuable resources that enable you to manage your healthcare more effectively.

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