



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.
 - o Example: John Smith = jsmith1234
 - Your temporary password is the same as your Login ID.
 - o 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.

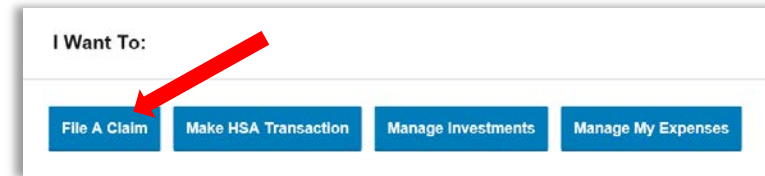
The screenshot displays the WEX Health Consumer Portal Home Page. At the top, there is a navigation bar with 'Home', 'Accounts', 'Tools & Support', and 'Message Center'. Below this is a 'Welcome' banner with a woman using a laptop. The main content area is divided into several sections:

- I Want To:** A row of buttons for 'File A Claim', 'Make HSA Transaction', 'Manage Investments', and 'Manage My Expenses'.
- Accounts:** A table showing account balances for 'HEALTH SAVINGS ACCOUNT' and '01012019 - 12/31/2019'. The table lists 'Cash Account' with an available balance of \$4,050.00 and 'Investment Account' with \$1,103.00. It also lists 'Limited Health Care Flex...' with \$2,683.50, 'Dependent Care Flex...' with \$0.00, 'Transit Pass Reimburs...' with \$0.00, and 'Parking Reimbursment...' with \$0.00.
- Tasks:** A notification stating '1 receipt(s) needed to approve your claims' with a 'View More' link.
- Healthcare Savings Goal:** A progress gauge showing 74% completion towards a goal of \$5,153 of \$7,000. There is an 'EDIT GOAL' link.
- Recent Transactions:** A table with columns: DATE, EXPENSE, RECIPIENT/PATIENT, MERCHANT/PROVIDER, SUBMITTED AMOUNT, and STATUS. It shows three transactions: Dental (\$6.50), Vision (\$25.00), and Dependent Care (\$7.00).
- Quick View:** Two bar charts. The first, 'HSA Contributions & Distributions', shows contributions and distributions for 2018 and 2019. The second, 'HSA Contributions by Tax Year', shows current contributions and maximum contributions for 2018 and 2019.

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, **OR** 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**.



The image shows a screenshot of the "Accounts / Receipts Needed" page. The page has a navigation bar with "Home", "Accounts", "Tools & Support", and "Message Center 2". Below the navigation bar, there is a section titled "Accounts / Receipts Needed" and a sub-section titled "Receipts Needed". A table lists a claim with the following details:

DATE OF SERVICE	ACCOUNT	MERCHANT / PROVIDER	RECIPIENT	CLAIM AMOUNT	RECEIPT STATUS	
3/2/2019	Limited Health...	University...	Uma Ballard	\$6.50	Required	View Confirmation Upload Receipt(s)

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.

Accounts

HEALTH SAVINGS ACCOUNT		01/01/2018 - 12/31/2018	
	AVAILABLE		AVAILABLE
Cash Account	\$2,012.50	Limited Health Care Flex... ?	\$2,445.95
Advance	\$0.00	Dependent Care Flexible... ?	\$1,918.30
Investment Account	\$795.00	Parking Reimbursement... ?	\$1,280.00
Available to spend <small>Includes Advance</small>	\$2,807.50		

[Contact Us](#) | [Uma Ballard](#) (0) | [Logout](#)

[Home](#) | **[Accounts](#)** | [Tools & Support](#) | [Message Center](#) 2

Accounts / Account Summary

The information displayed on the Account Summary page will vary depending upon your specific healthcare benefits. [View More](#)

Health Savings Account ?

TOTAL AVAILABLE BALANCE \$5,153.00

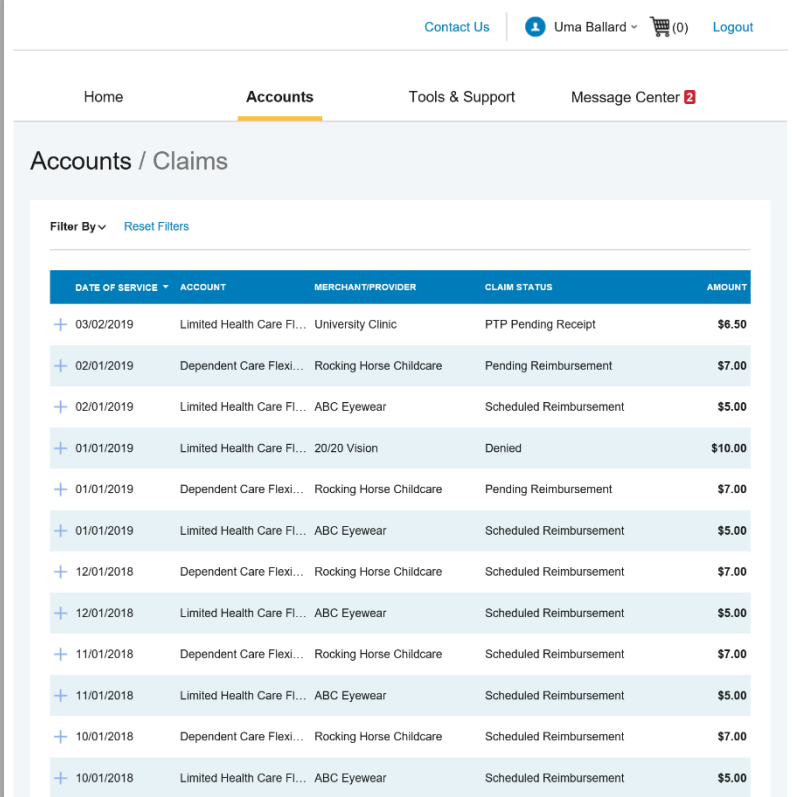
AVAILABLE CASH BALANCE \$4,050.00 INVESTMENT BALANCE \$1,103.00 * Current as of 3/13/2019

01/01/2019 - 12/31/2019 ESTIMATED PER PAY PERIOD DEDUCTION: \$1,161.66

ACCOUNT	ELIGIBLE AMOUNT	SUBMITTED CLAIMS	PAID	PENDING	DENIED	AVAILABLE BALANCE
+ Limited Health Care Flexible Spend...	\$2,700.00	\$26.50	\$0.00	\$16.50	\$10.00	\$2,683.50
+ Dependent Care Flexible Spending...	\$5,000.00	\$14.00	\$0.00	\$14.00	\$0.00	(\$14.00)
+ Parking Reimbursement Account	\$3,120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
+ Transit Pass Reimbursement Account	\$3,120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

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.



The screenshot displays the 'Accounts / Claims' page in a web application. At the top right, there are links for 'Contact Us', a user profile for 'Uma Ballard', a shopping cart icon with '(0)', and a 'Logout' button. Below this is a navigation bar with 'Home', 'Accounts' (highlighted), 'Tools & Support', and 'Message Center 2'. The main content area is titled 'Accounts / Claims' and includes a 'Filter By' dropdown and a 'Reset Filters' link. The table below lists various claims with the following columns: DATE OF SERVICE, ACCOUNT, MERCHANT/PROVIDER, CLAIM STATUS, and AMOUNT.

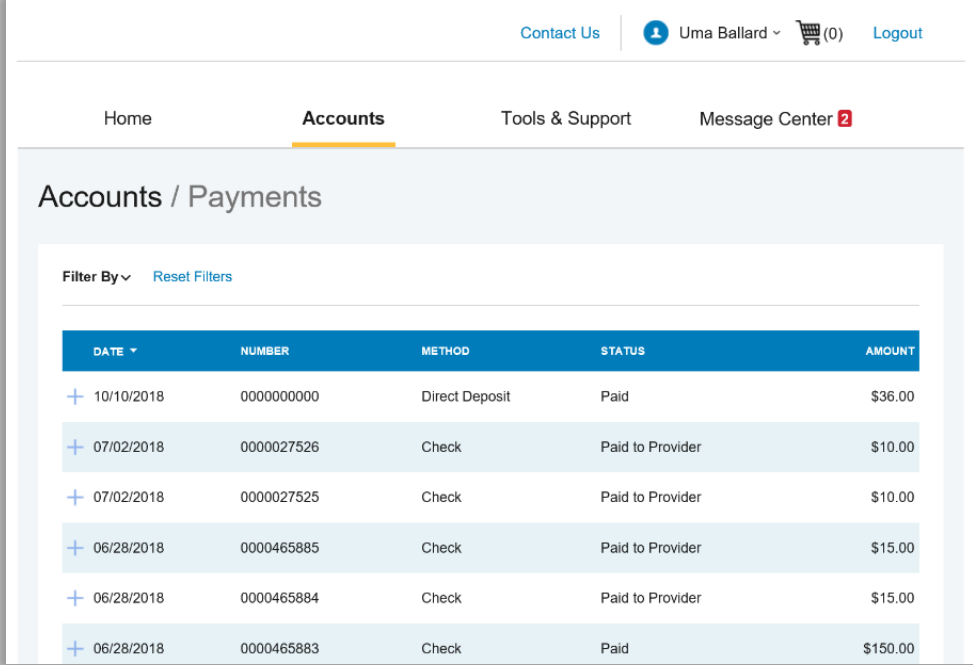
DATE OF SERVICE	ACCOUNT	MERCHANT/PROVIDER	CLAIM STATUS	AMOUNT
+ 03/02/2019	Limited Health Care Fl...	University Clinic	PTP Pending Receipt	\$6.50
+ 02/01/2019	Dependent Care Flexi...	Rocking Horse Childcare	Pending Reimbursement	\$7.00
+ 02/01/2019	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 01/01/2019	Limited Health Care Fl...	20/20 Vision	Denied	\$10.00
+ 01/01/2019	Dependent Care Flexi...	Rocking Horse Childcare	Pending Reimbursement	\$7.00
+ 01/01/2019	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 12/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	\$7.00
+ 12/01/2018	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 11/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	\$7.00
+ 11/01/2018	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 10/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	\$7.00
+ 10/01/2018	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00

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.



The screenshot shows the 'Accounts / Payments' page in a web application. At the top, there is a navigation bar with 'Contact Us', a user profile for 'Uma Ballard', a shopping cart icon with '(0)', and a 'Logout' link. Below this is a secondary navigation bar with 'Home', 'Accounts' (highlighted), 'Tools & Support', and 'Message Center 2'. The main content area is titled 'Accounts / Payments' and includes a 'Filter By' dropdown and a 'Reset Filters' link. A table displays a list of payments with columns for DATE, NUMBER, METHOD, STATUS, and AMOUNT. Each row has a plus sign icon to its left, indicating it can be expanded.

DATE	NUMBER	METHOD	STATUS	AMOUNT
+ 10/10/2018	0000000000	Direct Deposit	Paid	\$36.00
+ 07/02/2018	0000027526	Check	Paid to Provider	\$10.00
+ 07/02/2018	0000027525	Check	Paid to Provider	\$10.00
+ 06/28/2018	0000465885	Check	Paid to Provider	\$15.00
+ 06/28/2018	0000465884	Check	Paid to Provider	\$15.00
+ 06/28/2018	0000465883	Check	Paid	\$150.00

HOW DO I UPDATE MY PERSONAL PROFILE?

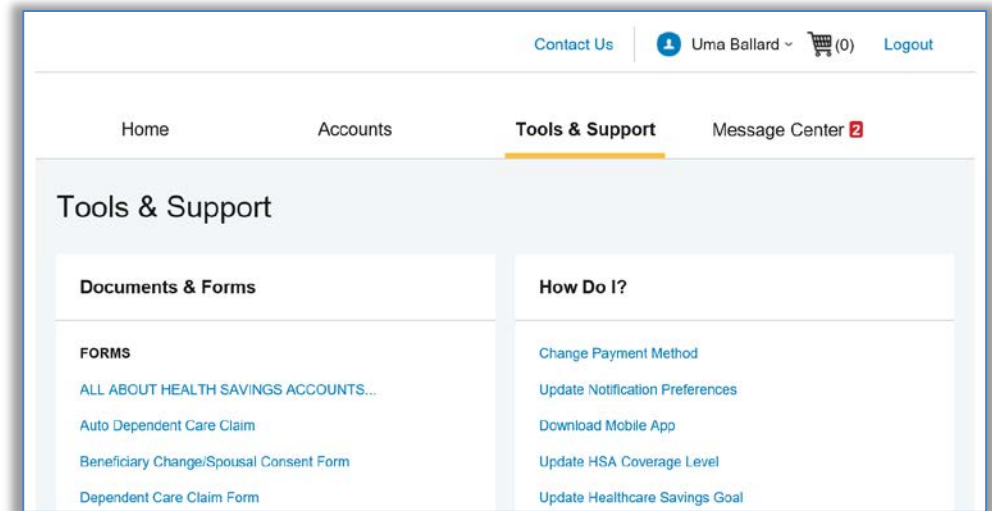
1. From the **Home Page**, under the **Accounts Tab**, you will find links to update profile information including profile summary details, dependents, and beneficiaries.
2. Click the appropriate link under Profile for your updates. Some profile changes will require you to answer an additional security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

The screenshot displays the 'Profile / Profile Summary' page in a web application. At the top, there is a navigation bar with 'Contact Us', a user profile for 'Uma Ballard' with a dropdown arrow, a shopping cart icon with '(0)', and a 'Logout' link. Below this is a secondary navigation bar with 'Home', 'Accounts' (highlighted with a yellow underline), 'Tools & Support', and 'Message Center' with a red notification badge '2'. The main content area is titled 'Profile / Profile Summary' and is divided into three main sections: 'Profile', 'Dependents', and 'Beneficiaries'. The 'Profile' section includes fields for 'HOME ADDRESS' (6029 Etiam Av, Wieze, MN 83483, United States), 'MAILING ADDRESS' (6029 Etiam Av, Wieze, MN 83483, United States), 'EMAIL' (employee@pde.com), 'GENDER' (Unspecified), 'MARITAL STATUS' (Unspecified), and 'CONSUMER COMMUNICATIONS' (131). There is an 'Update Profile' link in the top right of this section. The 'Dependents' section lists 'JONATHAN BALLARD' with a birth date of 5/2/2015 and 'Student: No', with a 'View / Update' link. There is an 'Add Dependent' link in the top right of this section. The 'Beneficiaries' section shows 'No beneficiaries' and has an 'Add Beneficiary' link in the top right.

HOW DO I GET MY REIMBURSEMENT FASTER?

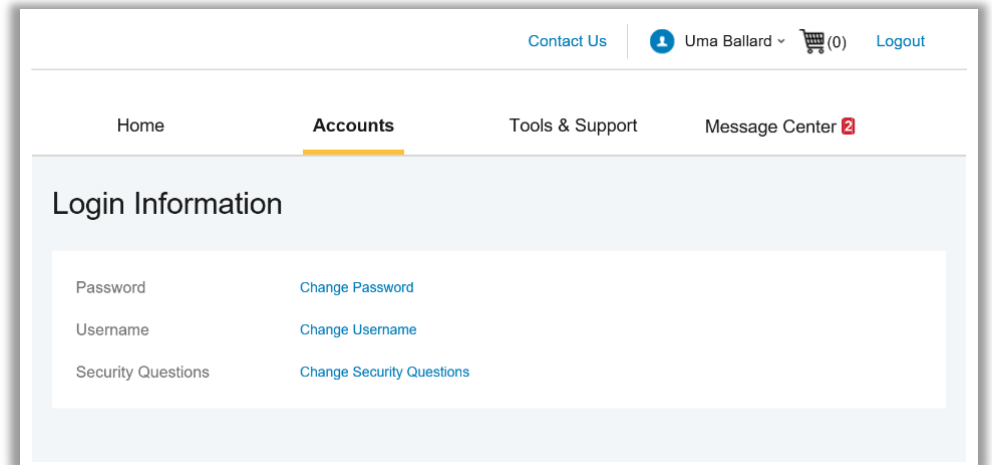
The fastest way to get your money is to sign up online for direct deposit to your personal checking account. Before you begin, make sure that your employer is offering direct deposit setup online.

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?

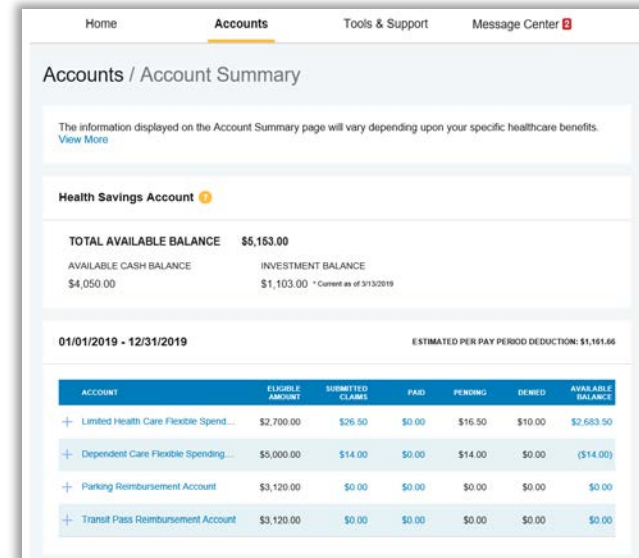
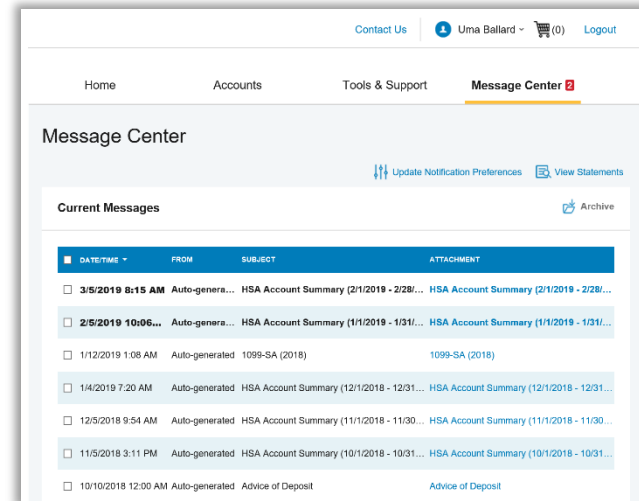
1. From the **Home Page**, click the **Tools & Support** tab.
2. Click any form or document of your choice.

...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.
OR 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.