# Employee User Guide

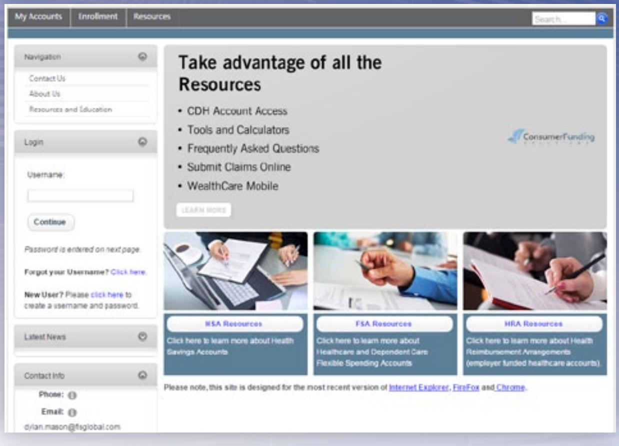
What Employees Need to Know About Using the Wealthcare Admin Portal

## Table of Contents

# Getting started

The Wealthcare Admin Portal  can be accessed by navigating to the following URL:

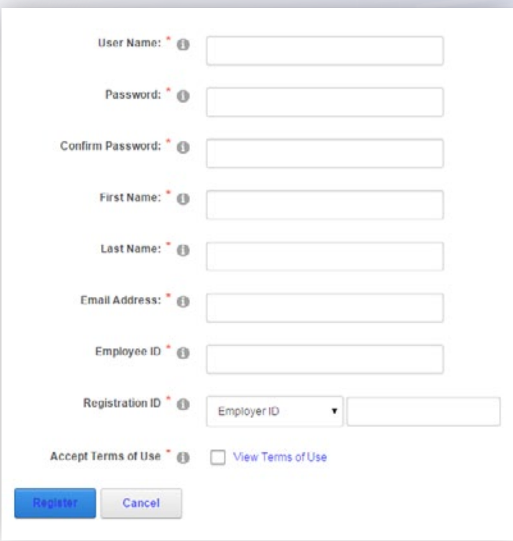
https://www.wealthcareadmin.com/default.aspx




## Registration

**Step 1.** If this is your first time accessing Wealthcare Admin Portal , simply click the register button atop the right corner of the home screen (as shown to the right).

**Step 2.** After clicking the register button, complete the registration form (as shown in the lower right below). Choose a username and password. Enter the required demographic information. You can obtain your employee ID and employer ID from your account administrator.




If you already have a benefit debit card, the card number can be used in place of the employer ID in the registration ID field.

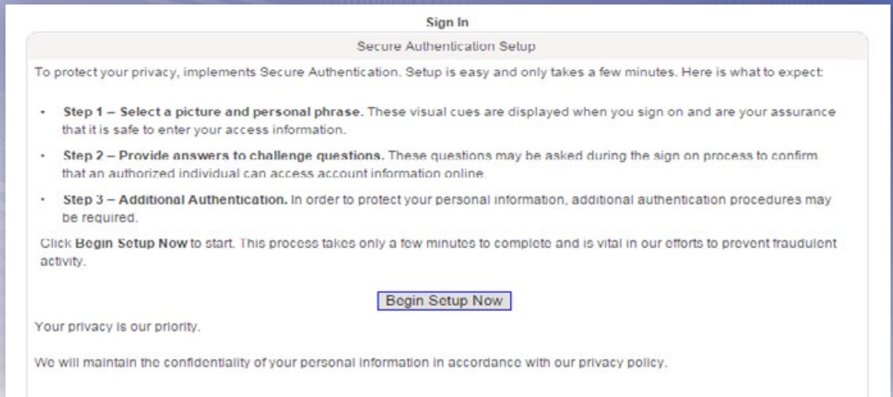
Before clicking register, be sure to view and accept the terms of use.

**Step 3.** After successfully completing the registration form, click register. The process may take several seconds. Do not click your browser's back button or refresh the page.

## Secure authentication

The next part of the registration process involves setting up your secure authentication. This important step helps ensure your account is secure and private.

After the registration form is successfully completed, you will be prompted to complete the secure authentication setup process. After reading the ***secure authentication setup*** instructions, simply click the ***begin step now*** button, as shown below.



Sign In

Secure Authentication Setup

To protect your privacy, implements Secure Authentication. Setup is easy and only takes a few minutes. Here is what to expect:

- **Step 1 – Select a picture and personal phrase.** These visual cues are displayed when you sign on and are your assurance that it is safe to enter your access information.
- **Step 2 – Provide answers to challenge questions.** These questions may be asked during the sign on process to confirm that an authorized individual can access account information online.
- **Step 3 – Additional Authentication.** In order to protect your personal information, additional authentication procedures may be required.

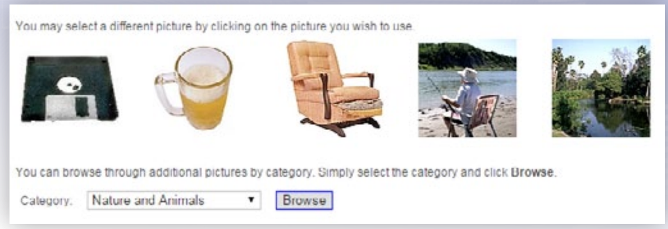
Click **Begin Setup Now** to start. This process takes only a few minutes to complete and is vital in our efforts to prevent fraudulent activity.

Begin Setup Now

Your privacy is our priority.

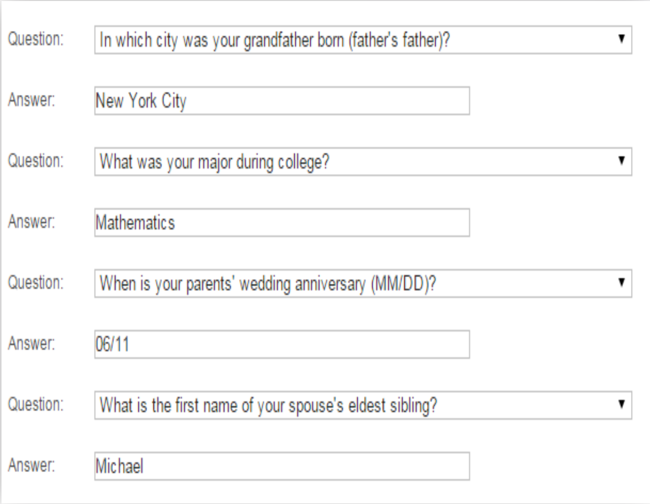
We will maintain the confidentiality of your personal information in accordance with our privacy policy.

Step 1. Enter a personal phrase. This phrase can be anything easily identifiable to you, up to 40 characters long. Your personal phrase will always appear alongside your picture when you log in.




You must also select a picture that gets linked to your personal phrase. During subsequent logins, viewing the combination of your personal phrase along with your picture are visual cues you are securely viewing the Wealthcare Admin Portal and can safely access your account.

**Step 2.** Select security questions.



Question: In which city was your grandfather born (father's father)?

Answer: New York City

Question: What was your major during college?

Answer: Mathematics

Question: When is your parents' wedding anniversary (MM/DD)?

Answer: 06/11

Question: What is the first name of your spouse's eldest sibling?

Answer: Michael

You must select four security questions and provide your secret answers. These questions are asked at random while you attempt to login to the Wealthcare Admin Portal . The questions help provide an additional layer of security and help ensure only you are able access your account.

**Step 3.** Verify your email address.

In the next page, you will be prompted to verify your email address. Enter your email address, and click *continue setup.*

On the next page, you will be asked to verify all of the information you've entered during the secure authentication process. After you've reviewed and confirmed the accuracy of the information, please click *submit setup information.*

A confirmation page will display showing the registration process has been completed. At this point, you can either 1) sign off, or 2) proceed to your account.

## Your first login

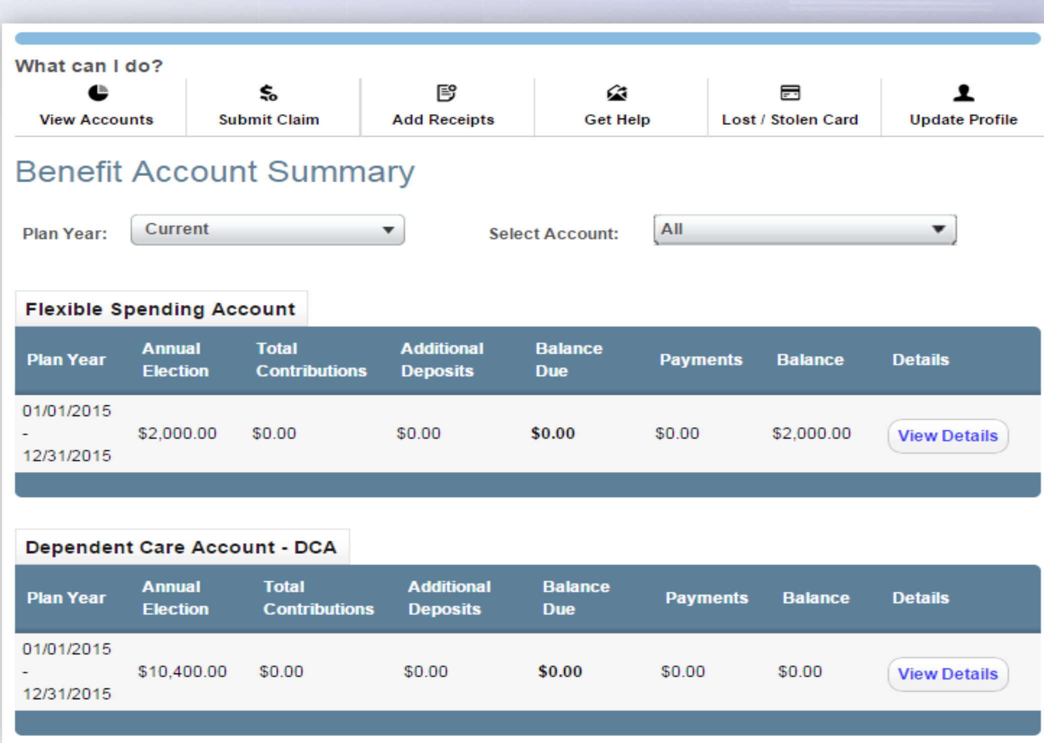
After registering, for all subsequent logins you can click the *login* link in the upper right corner of the home page. You will be prompted to enter your username, two of your four security questions, and finally your password.

# My accounts

The *my accounts* tab is where you access basic account information and manage all of your benefit accounts. You can submit & track claims, view account balances, and change reimbursement settings from the *my accounts* tab.

## Benefit account summary

The *benefit account summary* page provides at-a-glance account information such as account balance, plan dates, and other important details pertaining to your benefits accounts.




| Plan Year | Annual Election | Total Contributions | Additional Deposits | Balance Due | Payments | Balance | Details |
|---|---|---|---|---|---|---|---|
| 01/01/2015 - 12/31/2015 | $2,000.00 | $0.00 | $0.00 | **$0.00** | $0.00 | $2,000.00 | View Details |



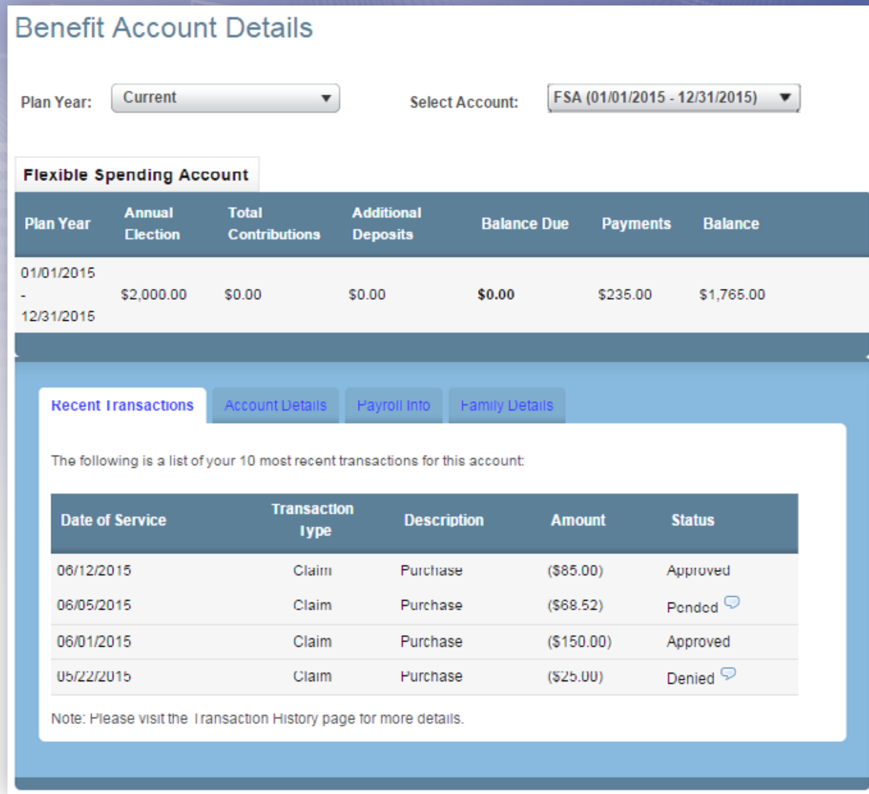
| Plan Year | Annual Election | Total Contributions | Additional Deposits | Balance Due | Payments | Balance | Details |
|---|---|---|---|---|---|---|---|
| 01/01/2015 - 12/31/2015 | $10,400.00 | $0.00 | $0.00 | **$0.00** | $0.00 | $0.00 | View Details |

The navigation bar at the top provides one-click access to other commonly used pages within the portal. This navigation bar appears throughout the application.

Use the dropdown menu to select the plan year and accounts displayed on this page. To view all available information on a specific benefit account, click the *view details* button. This takes you to the *benefit account details* page linked to that account.

## Benefit account details

The *benefit account details* page displays all available information regarding a specific benefit account, including all available data seen on the *benefit account summary* page, as well as additional details related to recent transactions, account balances, payroll information (if available), and any dependents linked to the respective account. Here you may toggle through the details of multiple benefit accounts using the *select account* dropdown menu.



Benefit Account Details

Plan Year: Current

Select Account: FSA (01/01/2015 - 12/31/2015)

Flexible Spending Account

| Plan Year | Annual Election | Total Contributions | Additional Deposits | Balance Due | Payments | Balance |
|---|---|---|---|---|---|---|
| 01/01/2015 - 12/31/2015 | $2,000.00 | $0.00 | $0.00 | **$0.00** | $235.00 | $1,765.00 |

Recent Transactions | Account Details | Payroll Info | Family Details

The following is a list of your 10 most recent transactions for this account:

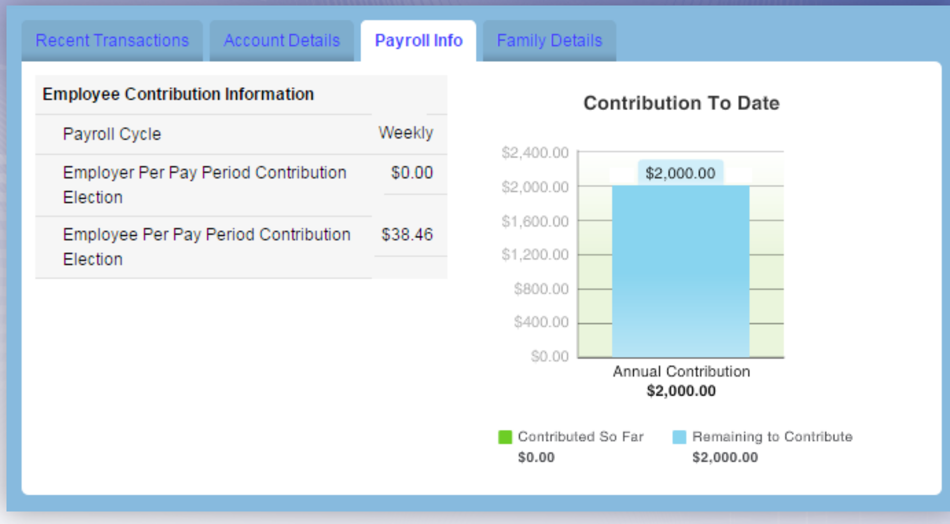
| Date of Service | Transaction Type | Description | Amount | Status |
|---|---|---|---|---|
| 06/12/2015 | Claim | Purchase | ($85.00) | Approved |
| 06/05/2015 | Claim | Purchase | ($68.52) | Pended |
| 06/01/2015 | Claim | Purchase | ($150.00) | Approved |
| 05/22/2015 | Claim | Purchase | ($25.00) | Denied |

Note: Please visit the Transaction History page for more details.

**Recent transactions**
As shown above, this section within the benefit account details page displays the 10 most recent transactions for the selected account. The transaction status is linked to the administration of the account and updates in real time as claims are processed.

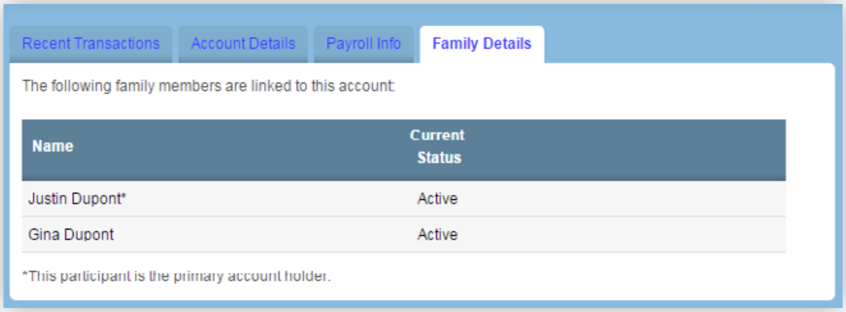
**Account details**
This section contains some helpful graphs to illustrate the progression of your account both in terms of spending and plan dates. Your balance details, and any applicable plan rules (limits, deductibles, rollover rules, etc.) display in this section as well.

**Payroll info**
If the selected benefit account is linked to a payroll calendar, the payroll info tab displays. This section shows your payroll frequency, per-pay-period amounts, as well as your remaining contribution in relation to your annual election, as shown below.




## Family details

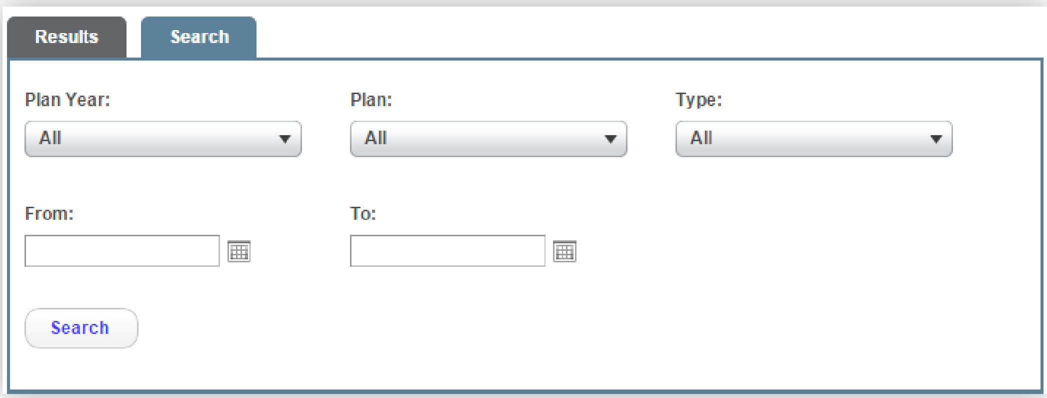
This section shows the name and status of the account holder and any dependents linked to the selected account, as shown below.



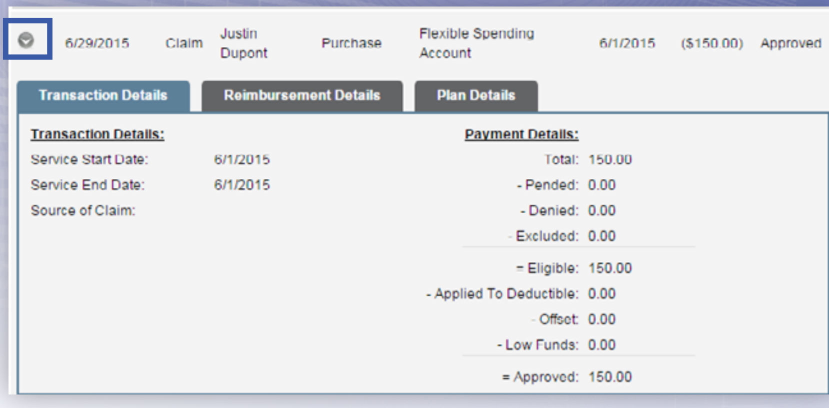

## Transaction history

The *transaction history* page displays a list of all transactions across all plans – with dates, amounts, statuses, and more.

The search tab allows you to narrow the list of transactions being displayed, by plan year, plan, transaction type, and/or date. Once your selected search parameters are in place, click the ***search*** button, as shown below.



Each transaction has an additional, expandable section displaying greater detail. Click the round arrow button (circled below) to expand the transaction details screen.



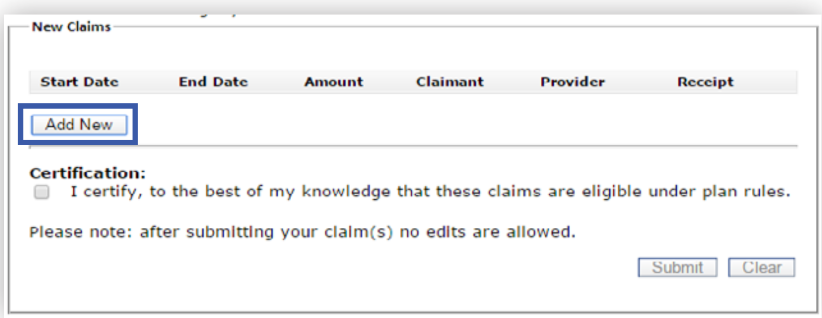

**Transaction details**
The *transaction details* tab, shown above, displays all dates and amounts pertinent to this transaction. The total amount is broken down by amount approved, pending, and denied. If any amount of the transaction is applied to a deductible, or used to offset a balance due, it displays here as well.

**Reimbursement details**
If the transaction is eligible for reimbursement, a *reimbursement details* tab appears in the expanded transaction view. If the transaction has not yet been reimbursed, this tab shows a reimbursement status of *pending reimbursement* and does not show any additional detail. If the transaction has been reimbursed, a number of details related to the reimbursement will display, as shown to the right.


**Plan details**
The *plan details* tab shows the plan name and dates associated with the transaction.

**Submit claims**
Use this page to submit a request for reimbursement electronically.

**Step 1.** Click the *add new* button.



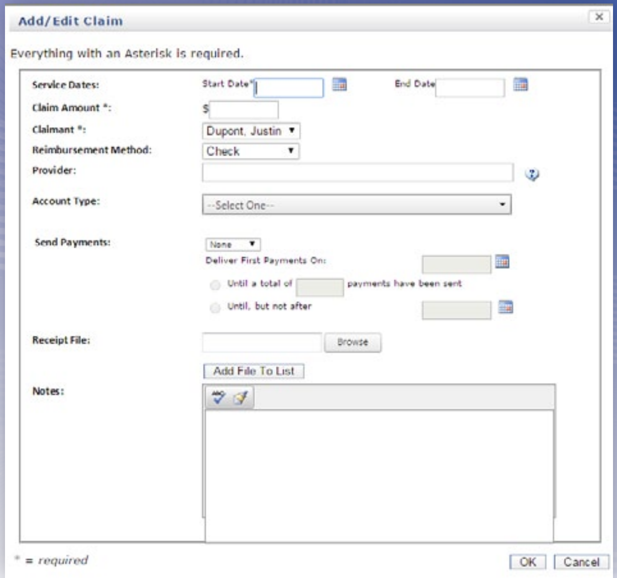
**Step 2.** Complete the claim form. Items with an asterisk (*) are required. Be sure to add a receipt file if you have one. When complete, click ok.

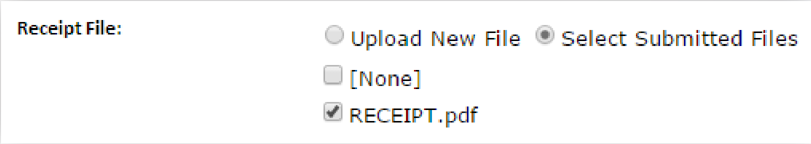
Your newly-entered claim appears in the new claims box. If you have any additional claims to enter, click the add new button again, and repeat the process until all claims are entered.

Click the *edit* button to go back and edit anything you have entered on a claim, as needed.

**NOTE:** Once you submit your claim, you are no longer able to edit it.

If you have linked a receipt file for a prior claim, you can choose to link the same receipt file when entering a subsequent claim, as shown below.




**Step 3.**
When complete, acknowledge the certification text by checking the checkbox and click the submit button.
A confirmation page displays, showing the tracking number and total amount for your submitted claim(s). Individual claim details appear under two headings; one for claims submitted with receipts, and one for claims submitted without.

| | |
|---|---|
| Participant: | Dupont, Justin |
| Tracking Number: | 1591 |
| Date Submitted: | 6/29/2015 |
| Total Requested: | $83.96 |

**Claims Submitted With Receipts:**

| Start Date | End Date | Amount | Claimant | Provider |
|---|---|---|---|---|
| 5/7/2015 | 5/7/2015 | $62.50 | Dupont, Justin | Avalon Medical Group |

**Claims Submitted Without Receipts:**

| Start Date | End Date | Amount | Claimant | Provider |
|---|---|---|---|---|
| 6/16/2015 | 6/16/2015 | $21.46 | Dupont, Justin | Dr. Miles |

View Receipt Submittal Form

**Step 4.**
If you would prefer to fax in your receipts instead of uploading them through the portal, click the view receipt submittal form button for a cover page that you can print and submit when faxing.

**Claims Submitted Without Receipts:**

| Start Date | End Date | Amount | Claimant | Provider |
|---|---|---|---|---|
| 6/16/2015 | 6/16/2015 | $21.46 | Dupont, Justin | Dr. Miles |

View Receipt Submittal Form

An example of the printable fax cover page is shown below.

## Claim Receipt Submittal Form

**Participant:** Dupont, Justin
**Date Submitted:** 6/29/2015
**Total Requested:** $83.96

**Claims Submitted With Receipts:**

| Start Date | End Date | Amount | Claimant | Provider |
|---|---|---|---|---|
| 5/7/2015 | 5/7/2015 | $62.50 | Dupont, Justin | Avalon Medical Group |

**Claims Submitted Without Receipts:**

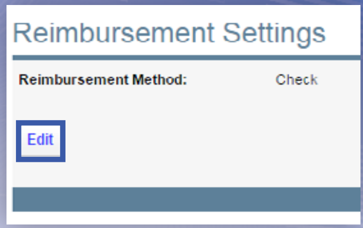
| Start Date | End Date | Amount | Claimant | Provider |
|---|---|---|---|---|
| 6/16/2015 | 6/16/2015 | $21.46 | Dupont, Justin | Dr. Miles |

###1T02238################1591

It is important that you submit your receipt with the cover page included when faxing, as it contains specific information that speeds up the process of linking your receipt with your claim in our system. Faxing in your receipt without this cover page may cause your reimbursement to be delayed.

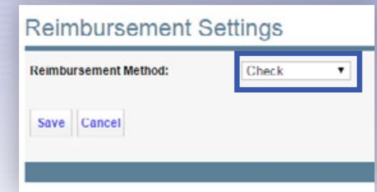
Please fax receipts to 860-295-6548.

## Reimbursement settings




On this page, you can edit your reimbursement preferences to one of the following options:

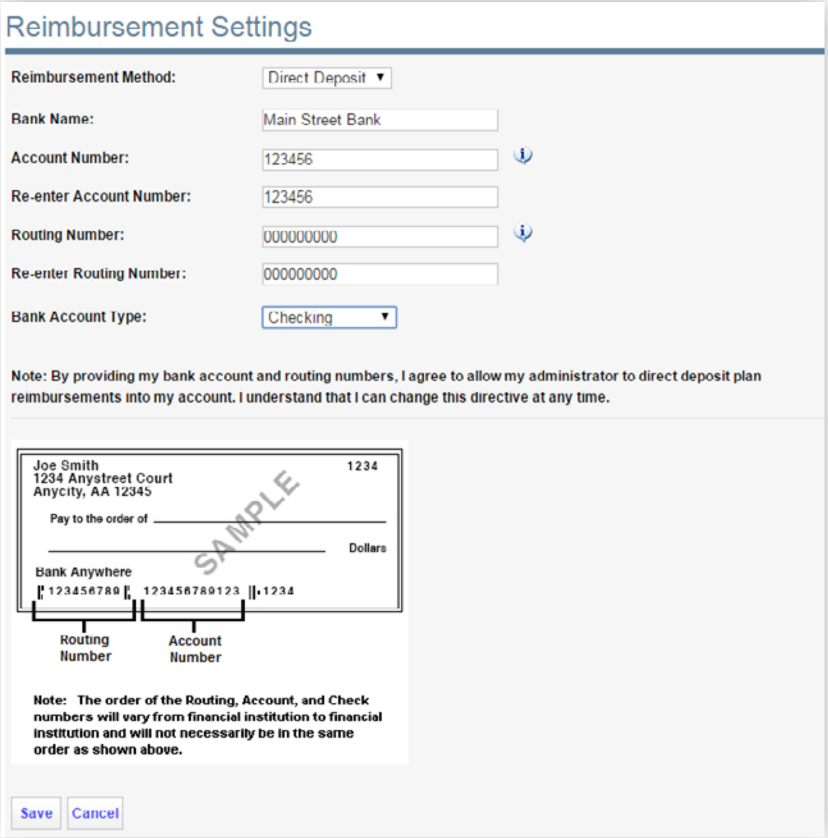
- Check – Reimbursements are mailed to you in paper check form
- Direct deposit – Reimbursements are deposited directly into your bank account
- Card – Reimbursements are credited to a special purse attached to your benefit debit card that you can then spend wherever you want.




**Change your reimbursement method**
**Step 1.** Click the edit button, as shown to the right.

**Step 2.** Choose your new reimbursement method from the dropdown menu.

**Step 3.** If the direct deposit reimbursement method is selected, enter the information for the bank account where you would like your reimbursements to be deposited, as shown below.




**Step 4.** Click save.

## Upload receipts / pending claims

This screen allows you to see details on claims that have been received by the administrator and are awaiting review. This is also the screen where receipts can be uploaded and attached to pending claims.

### Pending Claims

| Transaction Date | Type | Claimant | Date of Service | Amount | Status | Receipt |
|---|---|---|---|---|---|---|
| 6/29/2015 | Claim | Justin Dupont | 6/29/2015 | $100.00 | Entered Not Reviewed | |
| 6/29/2015 | Claim | Gina Dupont | 5/1/2015 | $35.00 | Entered Not Reviewed | |
| 6/29/2015 | Claim | Justin Dupont | 6/16/2015 | $21.46 | Entered Not Reviewed | |
| 6/29/2015 | Claim | Justin Dupont | 5/7/2015 | $62.50 | Entered Not Reviewed | |

Similar to the *transaction history* page, each pending claim can be expanded to show additional detail by clicking the round arrow button to the left of the claim.

### Pending Claims

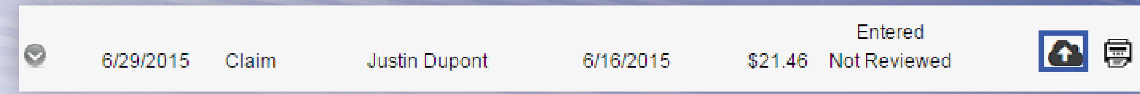
| Transaction Date | Type | Claimant | Date of Service | Amount | Status | Receipt |
|---|---|---|---|---|---|---|
| 6/29/2015 | Claim | Justin Dupont | 6/29/2015 | $100.00 | Entered Not Reviewed | |

| | |
|---|---|
| Transaction Date: | 6/29/2015 |
| Plan Type: | Flexible Spending Account |
| Plan Start Date: | 1/1/2015 |
| Plan End Date: | 12/31/2015 |
| Service Start Date: | 6/29/2015 |
| Service End Date: | 6/29/2015 |
| Claimant: | Justin Dupont |
| Provider: | Dr. Smith |
| Amount: | $100.00 |
| Status: | Entered Not Reviewed |
| Source of Claim: | Web Portal |

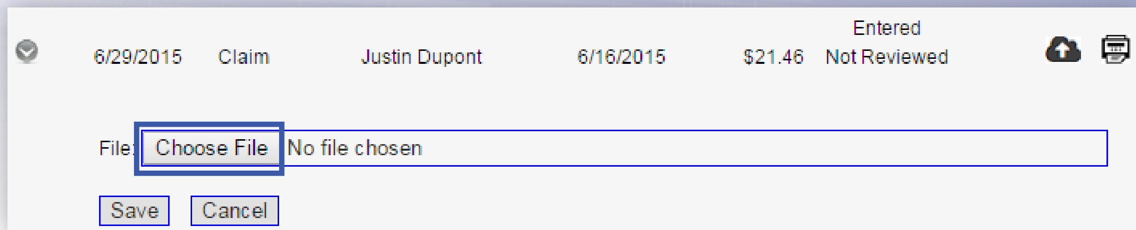
6/29/2015

To upload a receipt to a pending claim, follow these simple instructions.

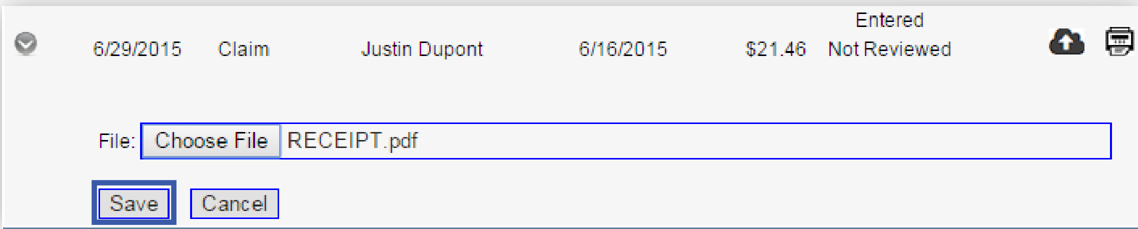
**Step 1.** Click the icon circled in orange below.



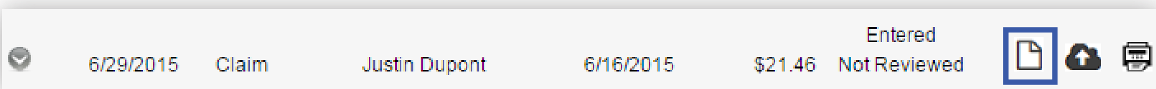

**Step 2.** Click the *choose file* button, and navigate to the receipt file.




**Step 3.** Once you have selected the receipt file you wish to upload, click *save*.




**Step 4.** When complete, the receipt icon should appear next to the pending claim as shown below.

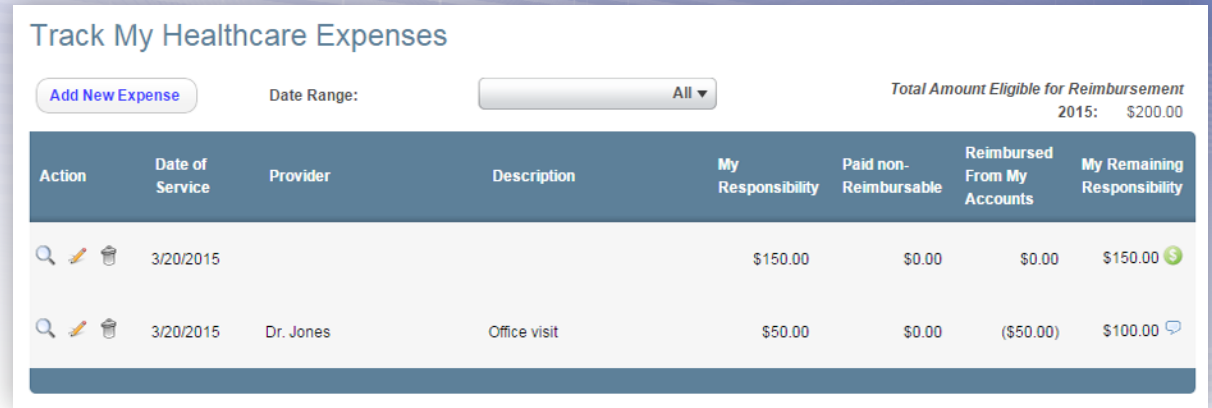



## Contact us

Using the *contact us* section, you can contact Diversified Group . Simply fill out the text form with a subject and message body, and it automatically submits a message on your behalf.

## My expenses

The ***my expenses*** page provides users the ability to track medical, dental, vision and prescription expenses. Think of it as an electronic shoebox of your healthcare-related expenses.



Track My Healthcare Expenses

Add New Expense    Date Range: All

*Total Amount Eligible for Reimbursement*
**2015:** $200.00

| Action | Date of Service | Provider | Description | My Responsibility | Paid non-Reimbursable | Reimbursed From My Accounts | My Remaining Responsibility |
|---|---|---|---|---|---|---|---|
| | 3/20/2015 | | | $150.00 | $0.00 | $0.00 | $150.00 |
| | 3/20/2015 | Dr. Jones | Office visit | $50.00 | $0.00 | ($50.00) | $100.00 |

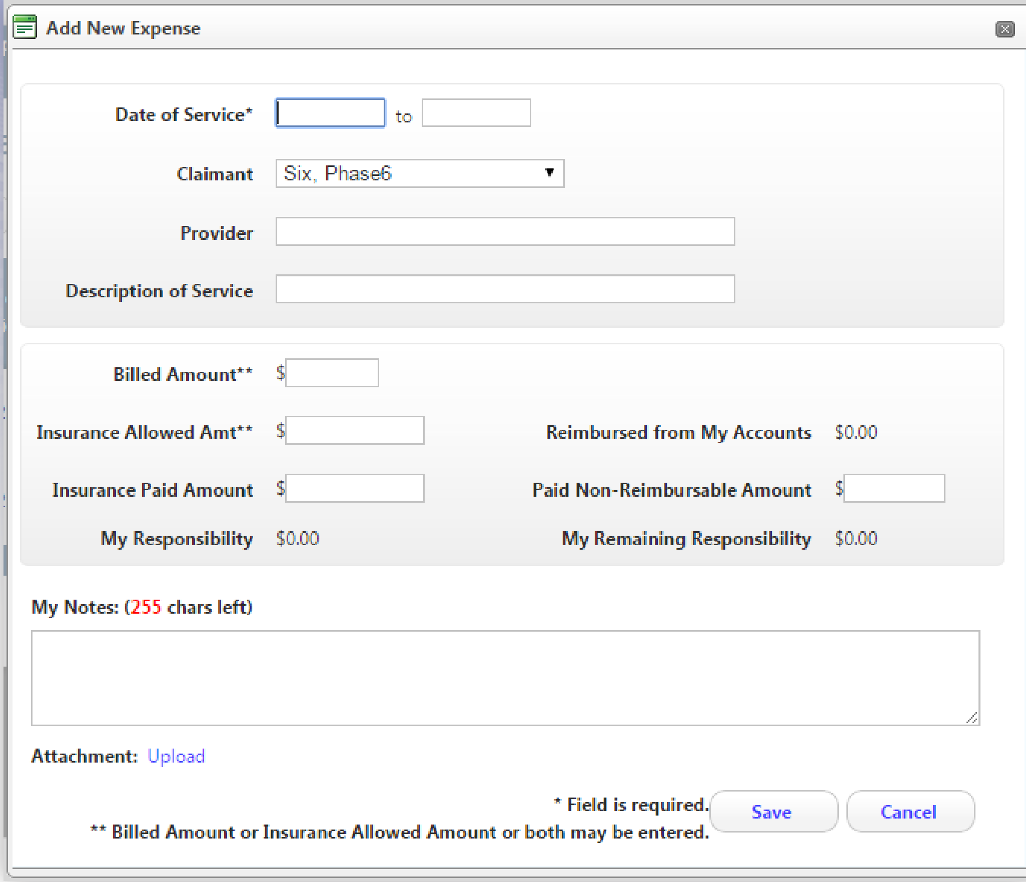
The following fields are available within the ***my expenses*** page:

- Action: Allows users to view, edit, or delete an expense.
- Date of service: Start date and end date for the service that was provided.
- Provider: Name of the service provider.
- Description: Description of the provided service.
- My responsibility: The total amount you are responsible for paying out-of-pocket.
- Paid non-reimbursable: The total amount you have paid toward this service.
- Reimbursed from my accounts: The total amount reimbursed.
- My remaining responsibility: The total amount that remains your responsibility.

Depending on administrative configuration, expense items can be entered by you, or automatically populated and matched to your profile via an electronic feed from your insurance carrier.

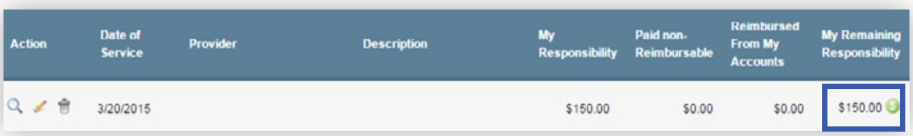
## Adding an expense

To add a new expense, click the ***add new expense*** button. A form appears for you to populate your expense details. This form is similar to the reimbursement request form, with fields for you to enter dates, provider information, a description, and an option for receipt upload. Some additional information regarding the amount you were billed by your provider is requested as well. When complete, click ***save.***

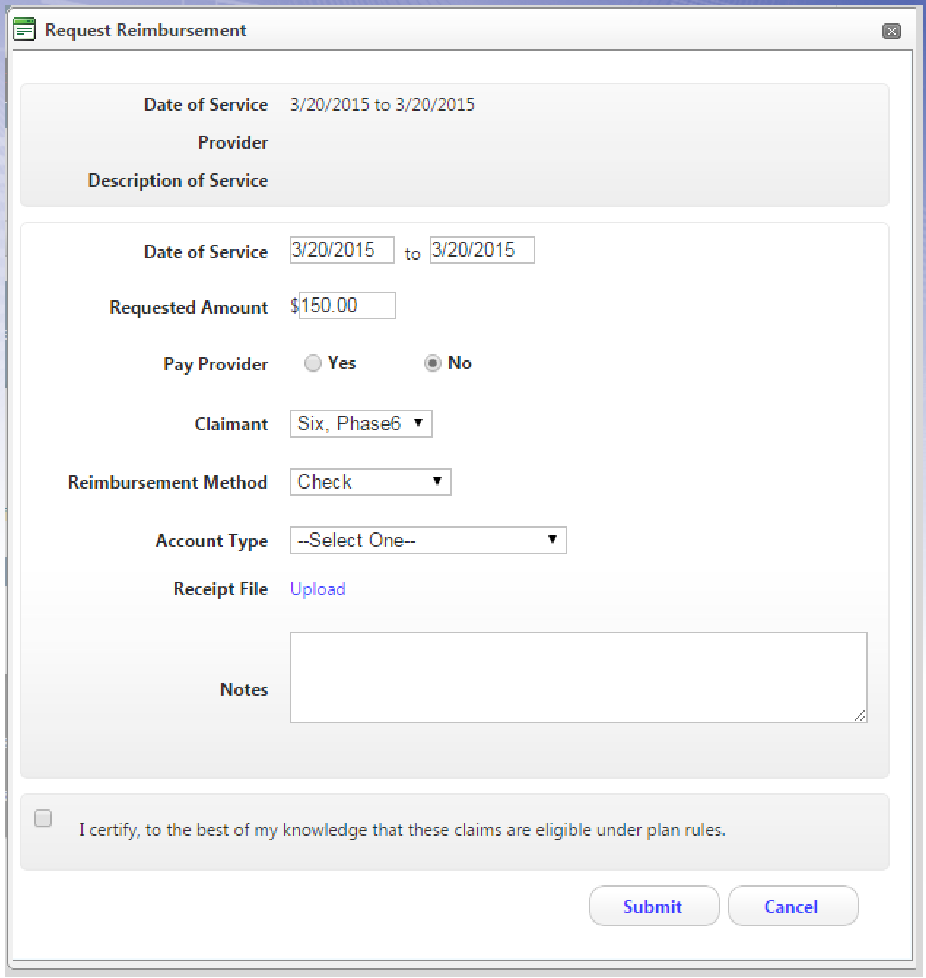



## Requesting reimbursement from my expenses

If an expense is eligible for you to request reimbursement, a green dollar sign icon appears to the right of the remaining responsibility amount, as shown below.




Clicking this icon displays a pre-populated reimbursement request form that you can edit and submit for reimbursement, as shown on the next page.




When you are ready to submit the request, check the certification checkbox and click *submit*.

# Communications

The communications tab is where announcements, alerts, and other communications from your administrator display.

## Announcements

Any announcement communications from Diversified Group appear here. You might find announcements displaying information on special programs, incentive opportunities, enrollment, instructions, policies, reminders, and more.

## View messages & communications

This page contains copies of messages, emails, SMS text messages, and other alerts that are specific to you and your benefit accounts. You might find balance alerts, enrollment confirmations, address change verifications, and other such communications listed.|

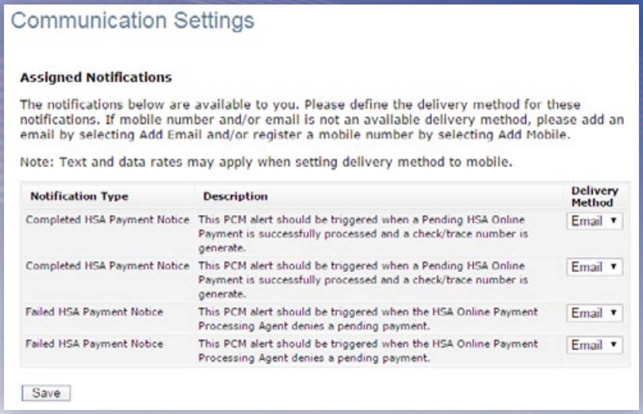
If the information in an alert contains particularly sensitive data, you may get an email or SMS text message notifying you that you have a message waiting for you in the portal. In those cases, the message can be retrieved from this page after you log in.

## Communication preferences

On this page, you can view the various alert communications available to you, and choose your preference for receiving those alerts. You can receive an alert via email, SMS text message (where available), or you can choose not to receive a particular alert at all.

Choose your preferred delivery method using the drop-down menus to the right, and *save* when complete.

You can also keep your email address up-to-date from this page. The email address provided here receives all applicable benefit account communications. Also, if available, you can register your mobile phone to receive SMS text alerts from this page as well. Any mobile phone that has SMS text message capabilities can be registered to receive text alerts.



Communication Settings

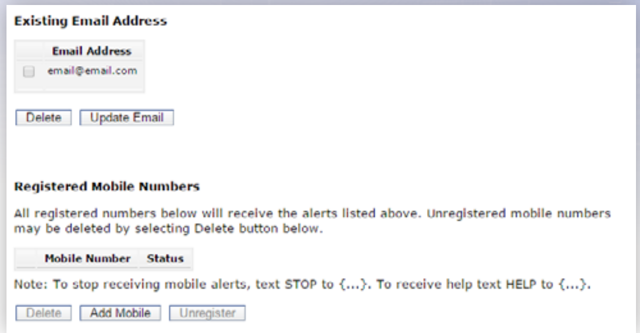
**Assigned Notifications**

The notifications below are available to you. Please define the delivery method for these notifications. If mobile number and/or email is not an available delivery method, please add an email by selecting Add Email and/or register a mobile number by selecting Add Mobile.

Note: Text and data rates may apply when setting delivery method to mobile.

| Notification Type | Description | Delivery Method |
|---|---|---|
| Completed HSA Payment Notice | This PCM alert should be triggered when a Pending HSA Online Payment is successfully processed and a check/trace number is generate. | Email |
| Completed HSA Payment Notice | This PCM alert should be triggered when a Pending HSA Online Payment is successfully processed and a check/trace number is generate. | Email |
| Failed HSA Payment Notice | This PCM alert should be triggered when the HSA Online Payment Processing Agent denies a pending payment. | Email |
| Failed HSA Payment Notice | This PCM alert should be triggered when the HSA Online Payment Processing Agent denies a pending payment. | Email |

Save



**Existing Email Address**

| Email Address |
|---|
| email@email.com |

Delete Update Email

**Registered Mobile Numbers**

All registered numbers below will receive the alerts listed above. Unregistered mobile numbers may be deleted by selecting Delete button below.

| Mobile Number | Status |
|---|---|

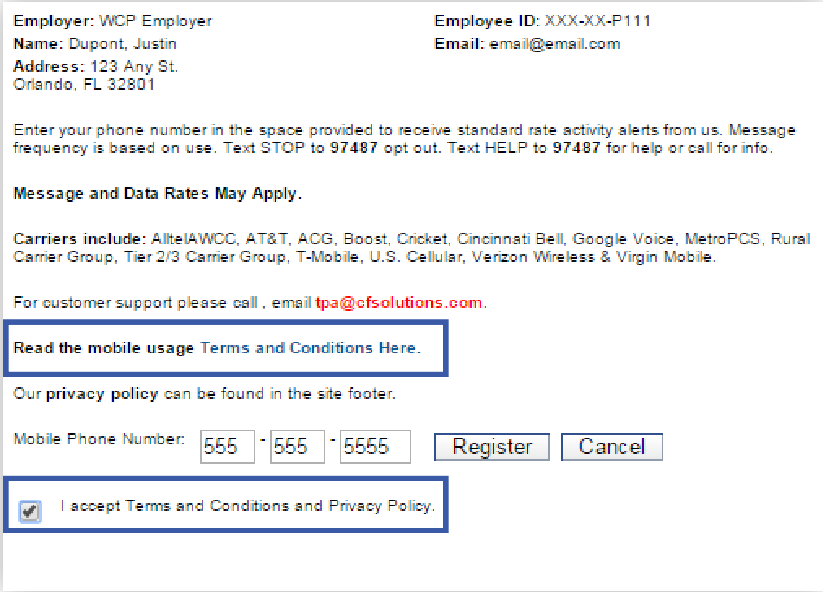
Note: To stop receiving mobile alerts, text STOP to {...}. To receive help text HELP to {...}.

Delete Add Mobile Unregister

## Registering your mobile phone for SMS text alerts

**Step 1.** Click the *add mobile button*, from the *communication preferences* page in the portal, as shown to the right.

**Step 2.** Read the terms & conditions, and enable the checkbox acknowledging that you accept them. Understand that message and data rates may apply.



**Employer:** WCP Employer
**Name:** Dupont, Justin
**Address:** 123 Any St.
Orlando, FL 32801

**Employee ID:** XXX-XX-P111
**Email:** email@email.com

Enter your phone number in the space provided to receive standard rate activity alerts from us. Message frequency is based on use. Text STOP to **97487** opt out. Text HELP to **97487** for help or call for info.

**Message and Data Rates May Apply.**

**Carriers include:** AlltelAWCC, AT&T, ACG, Boost, Cricket, Cincinnati Bell, Google Voice, MetroPCS, Rural Carrier Group, Tier 2/3 Carrier Group, T-Mobile, U.S. Cellular, Verizon Wireless & Virgin Mobile.

For customer support please call , email tpa@cfsolutions.com.

**Read the mobile usage** Terms and Conditions Here.

Our **privacy policy** can be found in the site footer.

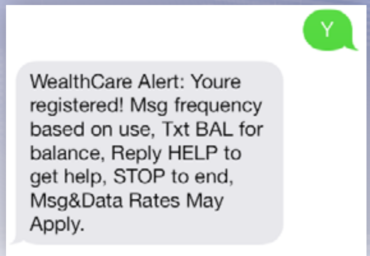
Mobile Phone Number: 555 - 555 - 5555 Register Cancel

I accept Terms and Conditions and Privacy Policy.

**Step 3.** Enter your mobile number and click *register*.

**Step 4.** Shortly, you will receive a confirmation text message on your mobile phone.

**Step 5.** Reply to this message with the letter Y to complete your registration. You should receive a confirmation message similar to the one to the right.


As stated in the message above, once registered, you can send the following text commands to 97487 at any time:

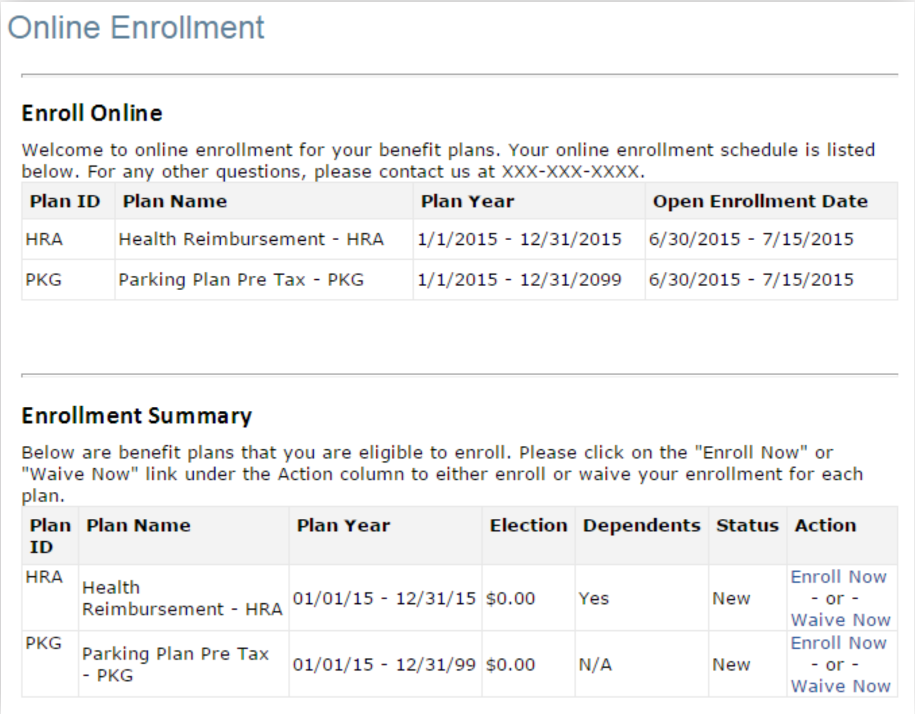
- **BAL** – To get your benefit account balances without having to log in to the online portal.
- **HELP** – To get help with SMS text alerts.
- **STOP** – To opt out of future SMS text alerts.

# Enrollment

If a plan assigned to your employer is available for online enrollment, this tab is where the enrollment process occurs.

## Open enrollment

This page is where you can start the process of enrolling in available plans. Any plans scheduled for open enrollment appear in the *enroll online* section with the applicable open enrollment dates, as shown below.
Plans that are currently available for enrollment display in the *enrollment summary* section with clickable links allowing you to either enroll in, or waive, the offered coverage.



Online Enrollment

**Enroll Online**

Welcome to online enrollment for your benefit plans. Your online enrollment schedule is listed below. For any other questions, please contact us at XXX-XXX-XXXX.

| Plan ID | Plan Name | Plan Year | Open Enrollment Date |
|---|---|---|---|
| HRA | Health Reimbursement - HRA | 1/1/2015 - 12/31/2015 | 6/30/2015 - 7/15/2015 |
| PKG | Parking Plan Pre Tax - PKG | 1/1/2015 - 12/31/2099 | 6/30/2015 - 7/15/2015 |

**Enrollment Summary**

Below are benefit plans that you are eligible to enroll. Please click on the "Enroll Now" or "Waive Now" link under the Action column to either enroll or waive your enrollment for each plan.

| Plan ID | Plan Name | Plan Year | Election | Dependents | Status | Action |
|---|---|---|---|---|---|---|
| HRA | Health Reimbursement - HRA | 01/01/15 - 12/31/15 | $0.00 | Yes | New | Enroll Now - or - Waive Now |
| PKG | Parking Plan Pre Tax - PKG | 01/01/15 - 12/31/99 | $0.00 | N/A | New | Enroll Now - or - Waive Now |

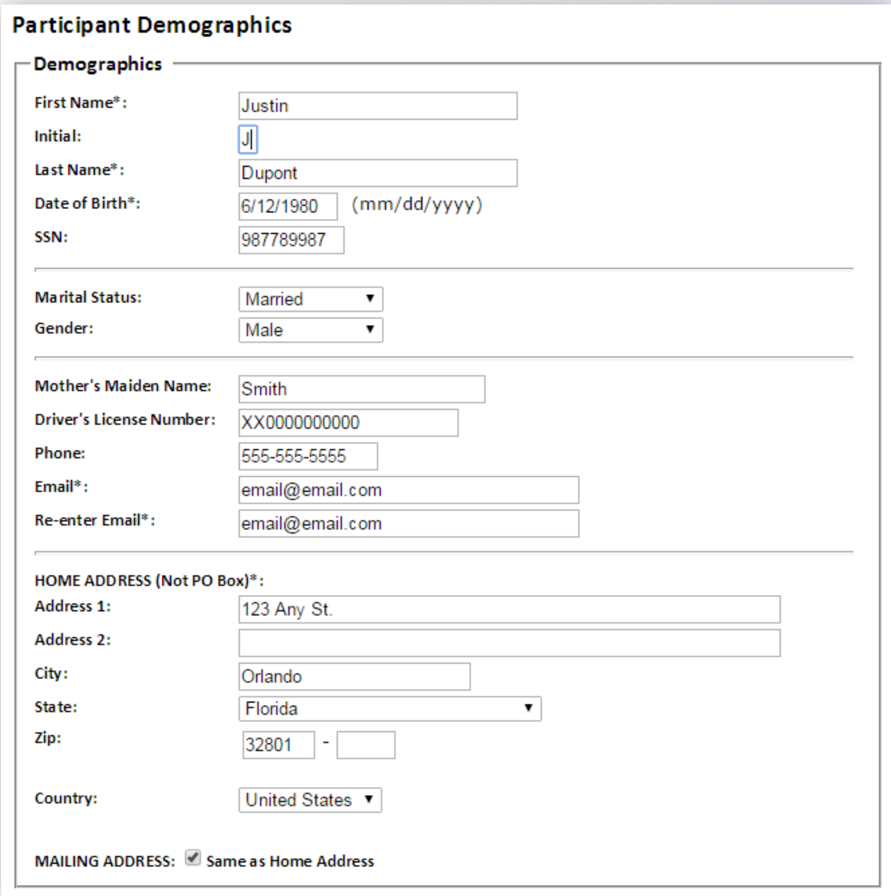
## Enrolling in a plan

**Step 1.** Click the *enroll now* link in the *action* column of the plan in which you wish to enroll.

| Plan ID | Plan Name | Plan Year | Election | Dependents | Status | Action |
|---|---|---|---|---|---|---|
| HRA | Health Reimbursement - HRA | 01/01/15 - 12/31/15 | $0.00 | Yes | New | Enroll Now or Waive Now |

**Step 2.** Verify and edit your demographic information. Be sure all fields marked with an asterisk (*) are completed, as shown on the next page.

Also, if available and/or applicable, add any dependents by clicking the ***add dependent*** button, and providing the required demographic information.


**Participant Demographics**

**Demographics**

First Name*: Justin
Initial: J
Last Name*: Dupont
Date of Birth*: 6/12/1980 (mm/dd/yyyy)
SSN: 987789987

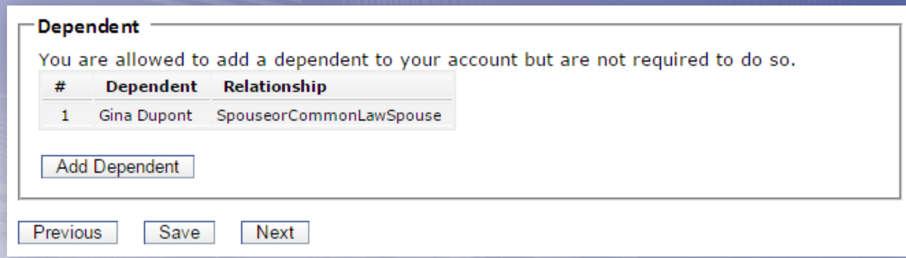
Marital Status: Married
Gender: Male

Mother's Maiden Name: Smith
Driver's License Number: XX0000000000
Phone: 555-555-5555
Email*: email@email.com
Re-enter Email*: email@email.com

HOME ADDRESS (Not PO Box)*:
Address 1: 123 Any St.
Address 2:
City: Orlando
State: Florida
Zip: 32801 -
Country: United States

MAILING ADDRESS: Same as Home Address

Also, if available and/or applicable, add any dependents by clicking the ***add dependent*** button, and providing the required demographic information.



**Dependent**

You are allowed to add a dependent to your account but are not required to do so.

| # | Dependent | Relationship |
|---|---|---|
| 1 | Gina Dupont | SpouseorCommonLawSpouse |

Add Dependent

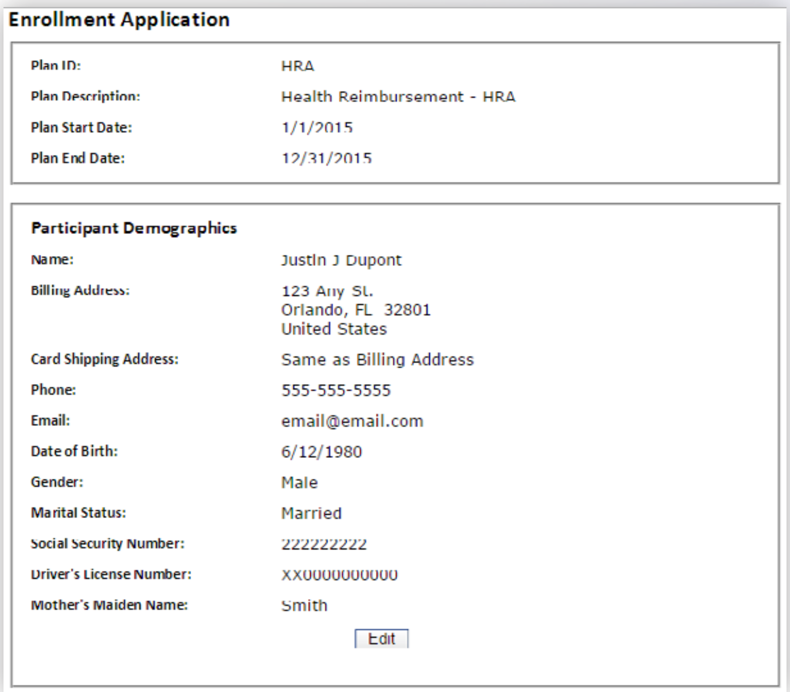
Previous | Save | Next

When all participant and dependent demographic information has been entered, click *next*.

**Step 3.** Provide your coverage election choices. Depending on the plan you are electing, you may be asked to choose a coverage tier, provide an annual election or per-pay-period election, and/or indicate a broker ID.

Once your selections have been made, read and check the certification acknowledgement checkbox and click *next*.

**Step 4.** A summary page lists all of your entered demographic information and coverage selections. Verify that all information is correct and use the *edit* buttons to change anything, as needed.



**Enrollment Application**

| | |
|---|---|
| Plan ID: | HRA |
| Plan Description: | Health Reimbursement - HRA |
| Plan Start Date: | 1/1/2015 |
| Plan End Date: | 12/31/2015 |

**Participant Demographics**

| | |
|---|---|
| Name: | Justin J Dupont |
| Billing Address: | 123 Any St.<br>Orlando, FL 32801<br>United States |
| Card Shipping Address: | Same as Billing Address |
| Phone: | 555-555-5555 |
| Email: | email@email.com |
| Date of Birth: | 6/12/1980 |
| Gender: | Male |
| Marital Status: | Married |
| Social Security Number: | 222222222 |
| Driver's License Number: | XX0000000000 |
| Mother's Maiden Name: | Smith |

Edit

**Participant Dependent**

| Name | ID | Relationship | DOB | SSN | Gender | FT Student | Phone |
|---|---|---|---|---|---|---|---|
| Gina Dupont | WCP1112 | Spouse or Common Law Spouse | | 334455667 | Female | No | |

**Address:** 123 Any St., Orlando, FL, 32801, United States

Edit

**Account Details**

| | |
|---|---|
| Coverage Tier: | Husband and Wife |
| Annual Election: | $1,050.00 |
| Broker ID: | 1234 |

Edit

Submit Application

When complete, click *submit application*.

**Step 5.** A confirmation message appears, indicating the enrollment process is complete. Clicking *done* takes you back to the main open enrollment page.

**Enrollment Complete**

You have completed the enrollment application and your account will be opened shortly. You will receive your welcome kit shortly.

Done

The *enrollment summary* section of the *open enrollment* page now displays the plan with a completed status. Elections and dependent information that you entered during the enrollment process appear as well. You can return to this page to make changes or waive coverage up until the end of open enrollment.

| Plan ID | Plan Name | Plan Year | Election | Dependents | Status | Action |
|---|---|---|---|---|---|---|
| HRA | Health Reimbursement - HRA | 01/01/15 - 12/31/15 | $1,050.00 | Yes | Completed | Change Now - or - Waive Now |

## Waiving coverage

**Step 1.** To waive coverage for a plan, click the *waive now* link in the action column for the applicable plan.

| | | | | | | |
|---|---|---|---|---|---|---|
| PKG | Parking Plan Pre Tax - PKG | 01/01/15 - 12/31/99 | $0.00 | N/A | New | Enroll Now - or - Waive Now |

**Step 2.** Check the box acknowledging that you are waiving the offered coverage and click submit.

**Waive Enrollment**

**Plan ID:** PKG
**Plan Description:** Parking Plan Pre Tax - PKG
**Plan Start Date:** 1/1/2015
**Plan End Date:** 12/31/2099

If you waive this coverage, you will not be eligible until next year's open enrollment period.

Please check the following box to waive your enrollment, then click on the "Submit" button:

☑ I choose to waive the coverage offered.

Submit Cancel

The enrollment summary now reflects that you have waived this plan by showing a status of waived. You can cancel your waived status and enroll in the plan at any time up until the end of the plan's open enrollment period.

**Enrollment Summary**

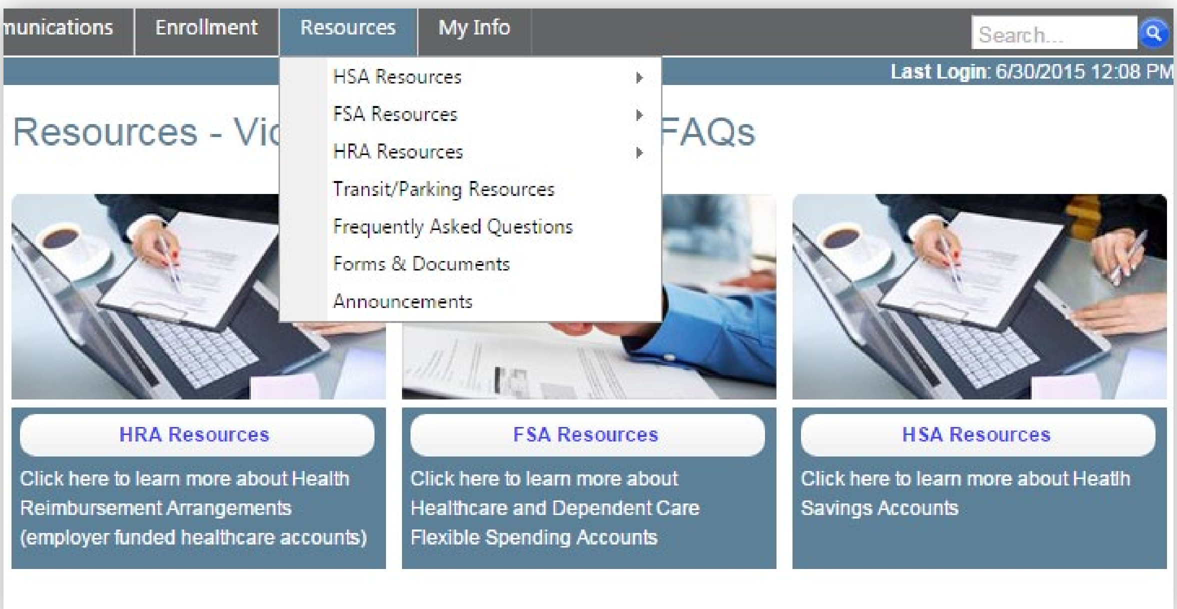
Below are benefit plans that you are eligible to enroll. Please click on the "Enroll Now" or "Waive Now" link under the Action column to either enroll or waive your enrollment for each plan.

| Plan ID | Plan Name | Plan Year | Election | Dependents | Status | Action |
|---|---|---|---|---|---|---|
| HRA | Health Reimbursement - HRA | 01/01/15 - 12/31/15 | $1,050.00 | Yes | Completed | Change Now - or - Waive Now |
| PKG | Parking Plan Pre Tax - PKG | 01/01/15 - 12/31/99 | $0.00 | N/A | Waived | Cancel Waived Enrollment |

# Resources

The resources tab contains a robust repository of helpful videos, calculators, and FAQs, designed to assist you in learning more about your benefit options. Any important forms and/or documents you might need are also available for download from this tab.

As you can see in the image below, most of the educational content is grouped by plan type.

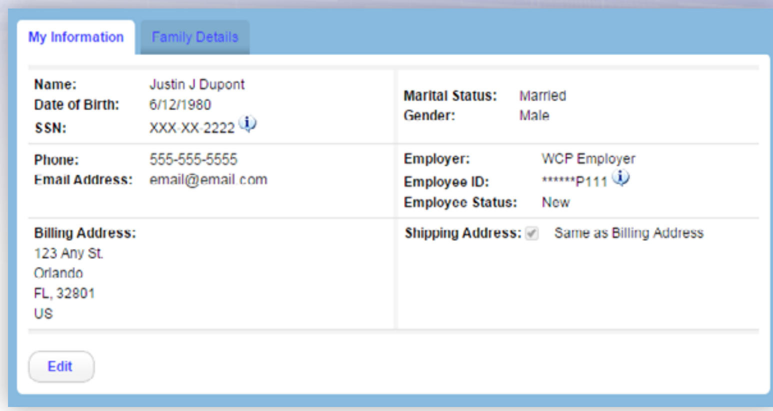


# My info

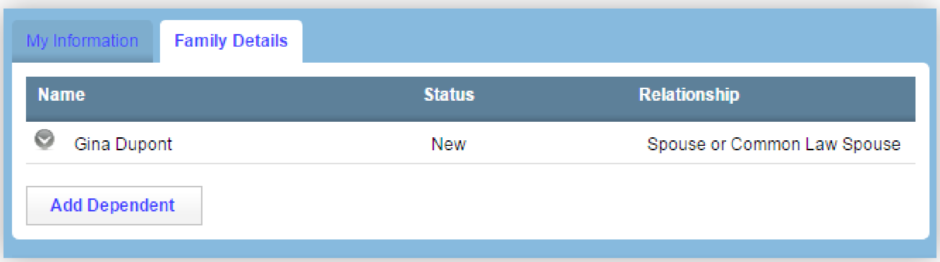
This tab contains information pertaining to your account and login credentials. Here, you can edit your demographics or those of your dependents, update your password, and manage your benefit debit card.

## Personal information

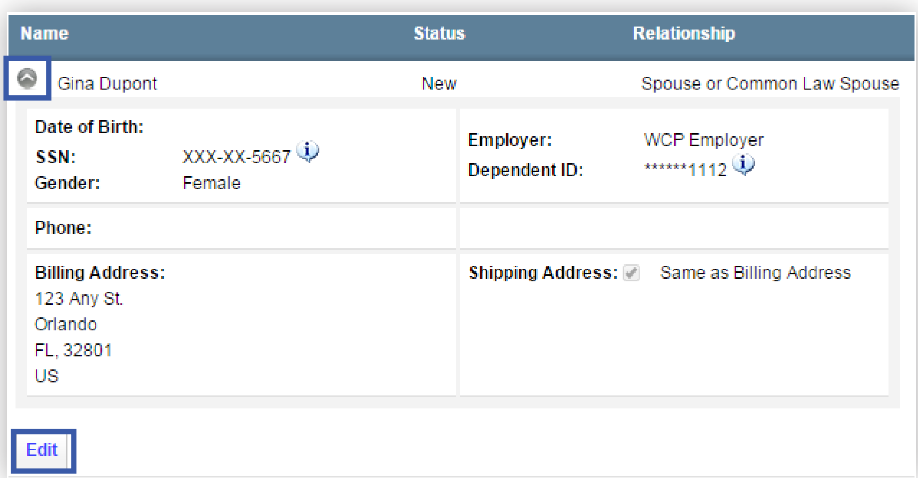
View and edit demographic information for yourself or your dependents from this page. Click the edit button to get access to the demographic fields. Once your edits are complete, click ***save***.



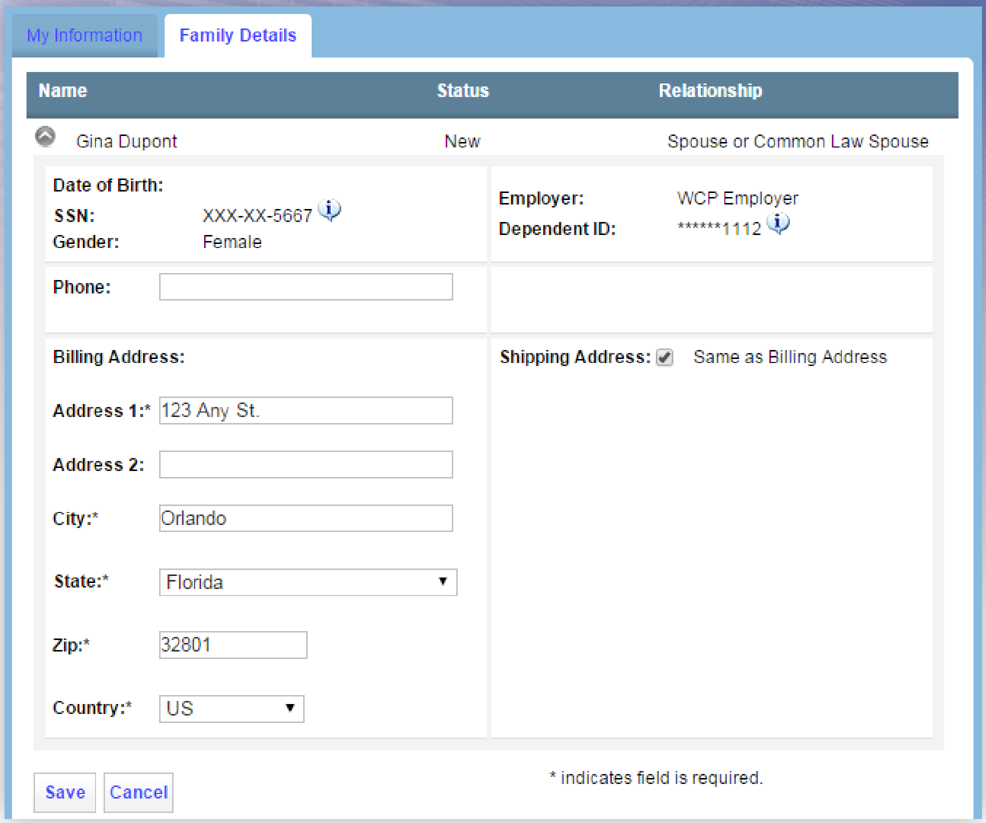

To view and edit the demographics of your dependents, or to add a new dependent, click the ***family details*** tab.




Expand the details of a particular dependent by clicking the round arrow button to the left of the dependent's name, as shown on the next page.

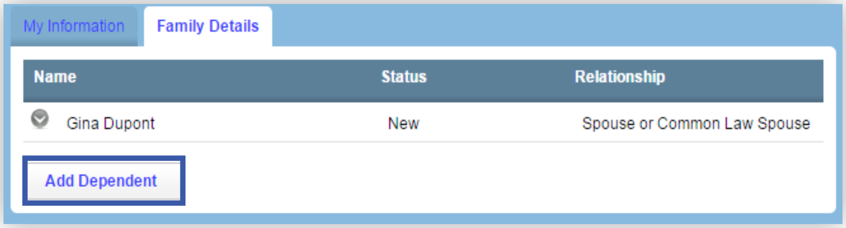



Use the ***edit*** button to update demographic details if necessary, and click ***save*** when complete.

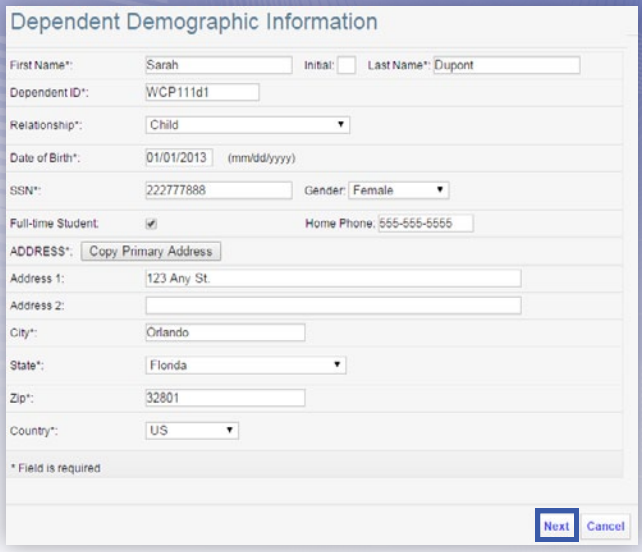



## Add a new dependent

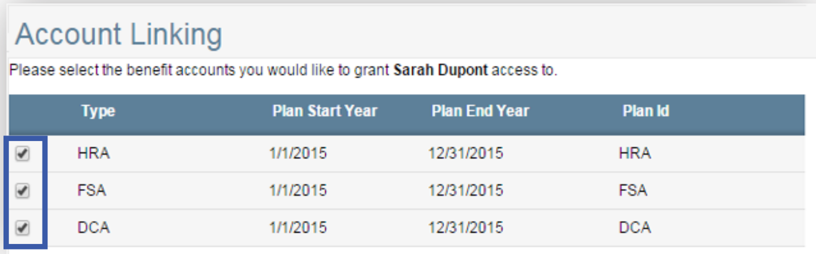
**Step 1.** Click the *add dependent button* in the *family details* tab on the *personal information* page.



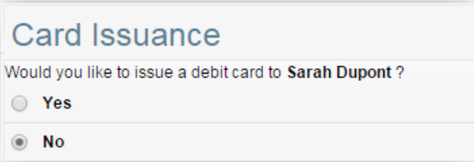

**Step 2.** Enter the dependent's demographic data and click next.



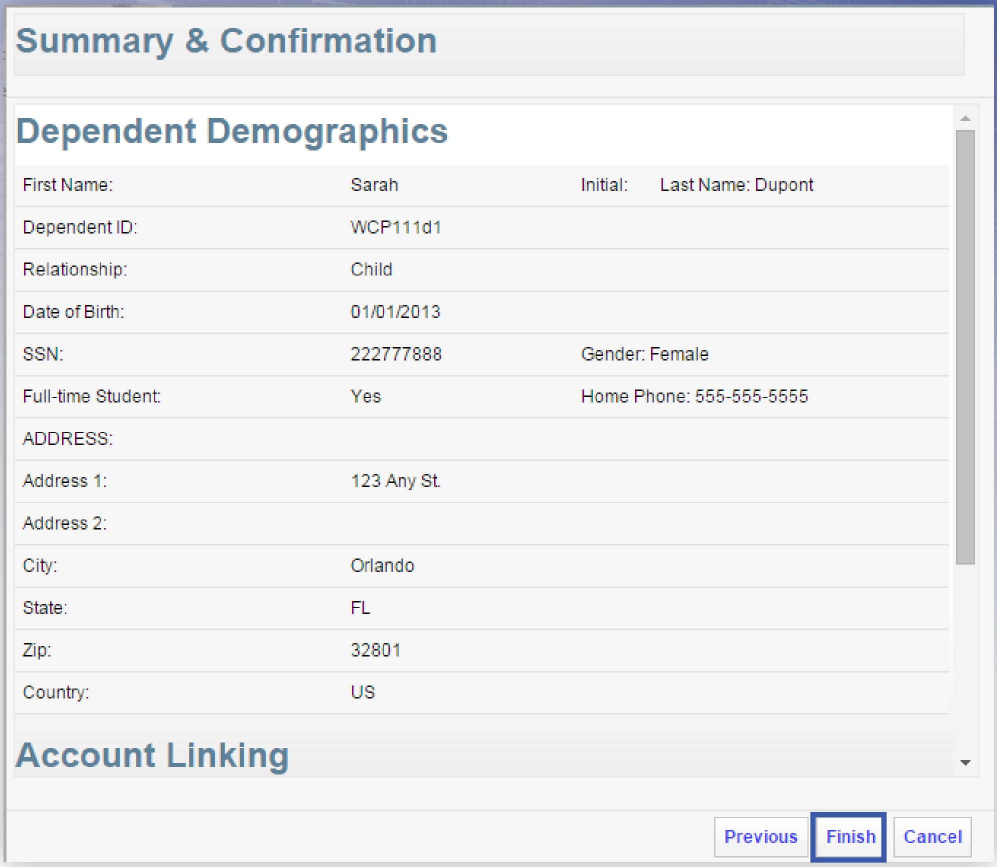

**Step 3.** Choose benefit accounts to link to the dependent by checking the appropriate checkboxes, then click *next*.




**Step 4.** Confirm whether or not a card should be issued. When complete, click *next*.




**Step 5.** Review the dependent summary, and make any edits as necessary. When complete, confirm that you wish to add this dependent by clicking *finish*.



## Summary & Confirmation

### Dependent Demographics

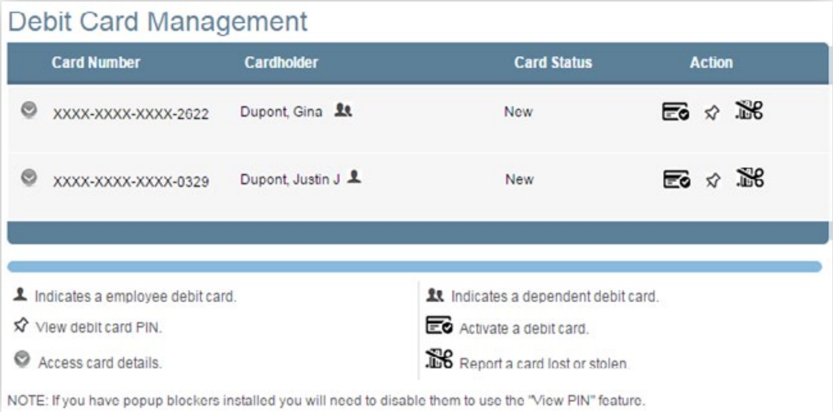
| | | | |
|---|---|---|---|
| First Name: | Sarah | Initial: | Last Name: Dupont |
| Dependent ID: | WCP111d1 | | |
| Relationship: | Child | | |
| Date of Birth: | 01/01/2013 | | |
| SSN: | 222777888 | Gender: Female | |
| Full-time Student: | Yes | Home Phone: 555-555-5555 | |
| ADDRESS: | | | |
| Address 1: | 123 Any St. | | |
| Address 2: | | | |
| City: | Orlando | | |
| State: | FL | | |
| Zip: | 32801 | | |
| Country: | US | | |

### Account Linking

Previous Finish Cancel

# Debit card management

Use this page to manage any benefit debit cards that have been generated and issued to you and/or your dependents.



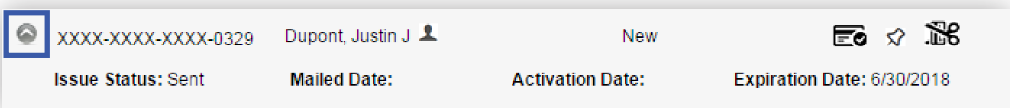
Debit Card Management

| Card Number | Cardholder | Card Status | Action |
|---|---|---|---|
| XXXX-XXXX-XXXX-2622 | Dupont, Gina | New | |
| XXXX-XXXX-XXXX-0329 | Dupont, Justin J | New | |

Indicates a employee debit card.
View debit card PIN.
Access card details.
Indicates a dependent debit card.
Activate a debit card.
Report a card lost or stolen

NOTE: If you have popup blockers installed you will need to disable them to use the "View PIN" feature.

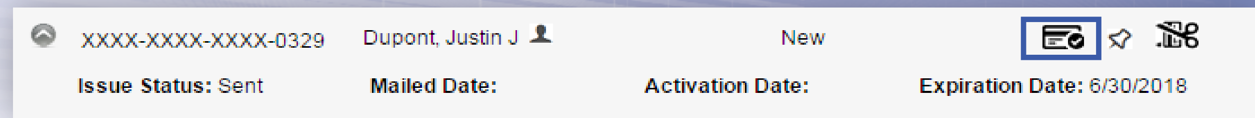
Clicking the round arrow button expands the section to reveal additional card details as shown below.



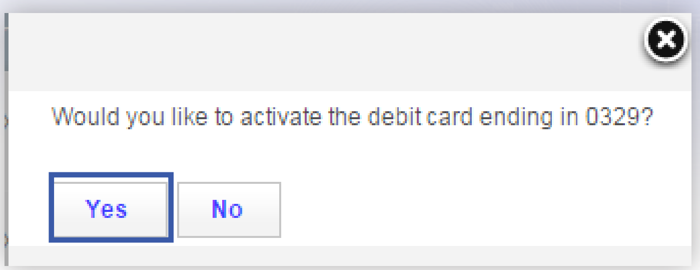
| | | | |
|---|---|---|---|
| XXXX-XXXX-XXXX-0329 | Dupont, Justin J | New | |
| **Issue Status:** Sent | **Mailed Date:** | **Activation Date:** | **Expiration Date:** 6/30/2018 |

## Activate a debit card

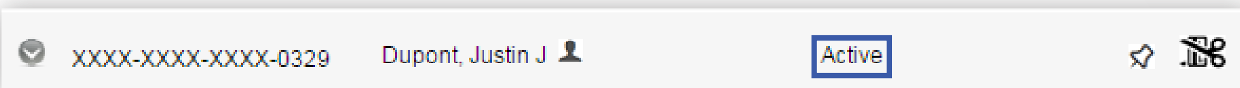
Click the card icon for the card you wish to activate, as shown below.




Click *yes* to confirm that you would like to activate the card.



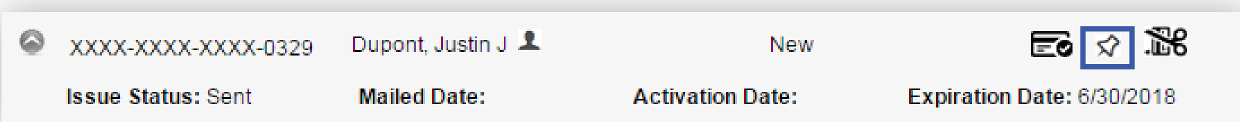

On the debit card management page, notice that the card status has changed to active, and the card icon has disappeared from the right side of the row, indicating that the card is now active.



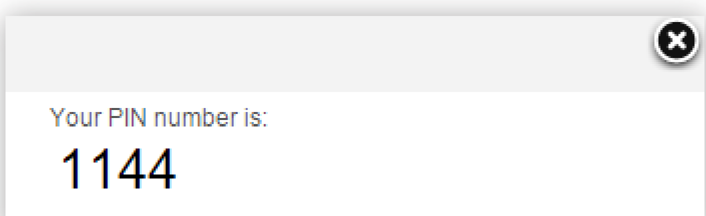

## Obtain your PIN number

Most benefit debit card transactions are verified at the point-of-sale with a signature. However, you may use a PIN number to complete card transactions as well.

To access the PIN number assigned to your card, click the pushpin icon as indicated below.

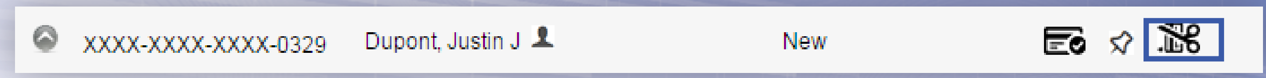



Your PIN number appears in a pop-up window:

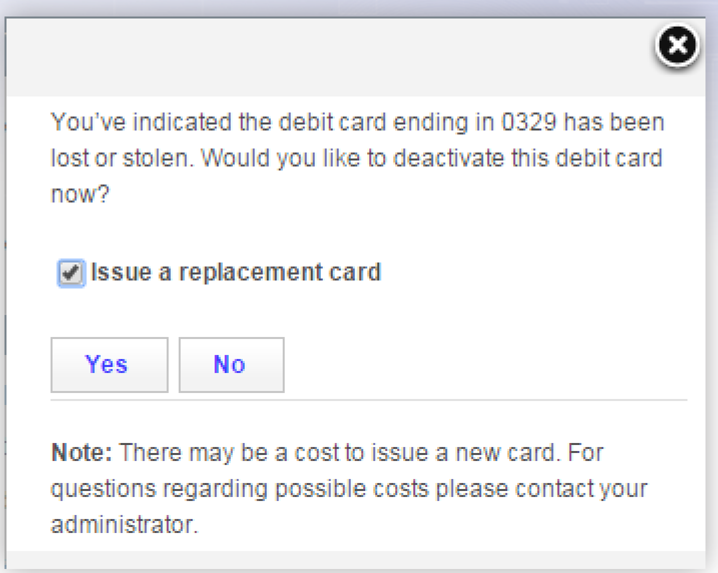


## Report a card lost / stolen

To report your benefit debit card as lost or stolen, click the scissors icon as shown below.

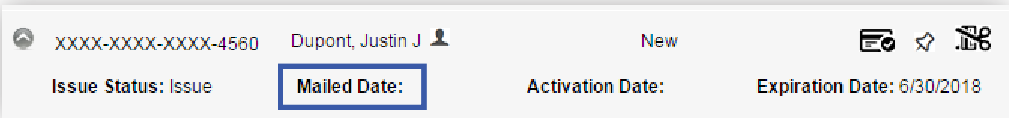



You can deactivate the card by clicking the yes button. If you would like a replacement card issued, be sure the checkbox is checked.




Once complete, the *debit card management* page displays with the original card in a ***lost/stolen*** status, and the new card (if requested), in a ***new*** status.


If requested, the new card will arrive in approximately 7-10 business days. You can track when the new card is on its way by expanding the card details and checking the mailed date periodically. This date populates automatically once the card has been mailed.



## Change password

If you would like to change your password at any time, you can do so from this page.  You must answer two of your secure authentication security questions, then enter, confirm, and submit your new password.