



Flexible Spending Account (FSA) Member Portal Guide

Simplify your healthcare finances with convenient, online access to your tax-advantaged benefit account

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Getting started

The FSA Member Portal can be accessed by visiting the following URL:

• <u>https://preferredadmin.wealthcareportal.com</u>

First Time New Registration

- **Step 1:** If this is your first time accessing FSA Member Portal, click the *register* button atop the right corner of the home screen.
- **Step 2:** Complete the registration form (as shown in the image on the lower right).
 - Choose a username & password
 - Enter your demographic information
 - Enter our Employee ID: Enter your Social Security Number
 - Enter your Employer ID:
 - UMC Employer ID: EPF001
 - ➢ EPCH Employer ID: EPF002

	☐ 800-111-3333 ⊜ wcp.qa.user@gmaiL.com
(9) We will maintain the confidentiality of your accordance with our privac	personal information in y policy.
Sign in	
Username	
Forgot your Username? <u>Let us help</u>	
SIGN IN	
(i) To protect your personal informati password on a separate page.	ion, we collect your
Don't have an account?	
C REGISTER	
-	

If you already have a benefit debit card, the debit 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:** Click *register*. The process may take a few seconds. Do not click your browser's back button or refresh the page.

Secure authentication

The next phase of registration involves setting up your secure authentication. This crucial 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.

• **Step 1.** Select your security questions. From the list, please select four security questions and provide your answers. These questions will be randomly asked during subsequent logins to ensure security. When finished, click *next*.

Username *	
ନ୍ତି Password *	
Password Strength	
S Confirm Password *	
First Name *	
Initial	
Last Name *	
🖄 Email *	
Employee ID *	
Registration ID *	Employer ID 🗸
l accept <u>Terms of U</u>	lse

• Step 2. Verify your email address.

On the next page, you will be prompted to verify your email. Click next.

	Register - Secure Authentication STEP 1 STEP 2 STEP 3 STEP 4
First Name	Test
Last Name	Account
🖄 Confirm Email *	hjones@alegeus.com The email address entered is used for security encryption only. It is not used for solicitation purposes.
	X CANCEL VEXT

• **Step 3.** Submit setup information. On the next page, you'll be asked to verify the information you entered during the secure authentication process. After you've reviewed and confirmed the accuracy of this information, click *submit setup information*.

A confirmation page will display the successful completion of your registration.

Your first login

Once registered, you will be able to enter your username, answer security questions, and enter your password on all subsequent login attempts.

Existing Users

FSA participant portal users with an existing username and password will be able to sign in with their previous username and password and follow the Registration Steps.



• **Step 1.** The next phase of registration involves setting up your secure authentication. This crucial step helps ensure your account is secure and private.

Preferred administrators	 □ 1-877-532-3778 △ preferredadmin@elpasohealth.com
Register	
	Register STEP 1 STEP 2 STEP 2 STEP 4
(j) To protect	your privacy, this site implements Secure Authentication. Setup is easy and only takes a few minutes. Click Begin Setup Now to start

• **Step 2.** After the registration successfully completed, you will be prompted to complete the secure authentication setup process.

Preterred administrators	☐ 1-877-532-3778 ⊘ preferredadmin@elpaso	health.com			
Register					
	Regis	ster - Secure A	uthen	tication	
	STEP 1	STEP 2	STEP 3		
Select Question 1	k	_			
Which high school	ol did you attend?	~	(\mathbf{i})	Please use the following list to choose four questions which are relevant to you and then enter answers to those questions. These questions may be asked during the sign on process to	
Type your answe	r here			confirm that an authorized individual can access account information online.	
Select Question 2	*				
What is the first r	ame of your eldest nephew/niece?	\sim			
Type your answe	r here				
Select Question 3	*				
What is your gran	dfather's middle name (your mother	\sim			
Type your answe	r here				
	mulea he Ann in				

• **Step 3.** Verify your email address. On the next page, you will be prompted to verify your email. Click *next*.

		☐ 1-877-532-3778
Register		
		Register - Secure Authentication
		STEP 1 STEP 2 STEP 3 STEP 4
	First Name	Margarita
	Last Name	Guerra
	🖄 Confirm Email *	mguerra0927@yahoo.com The email address entered is used for security encryption only. It is not used for solicitation purposes.
		🗸 NEXT 🔀 CANCEL
Step 4. Verif	fy your information	n below before submitting.
		STEP1 STEP 2 STEP 3 STEP 4
	(i) Your setup information clicking Submit. If you	on has not yet been submitted. Please verify your information below before need to make a change before submitting, click the appropriate Edit Info link
Questions an	d Answers	
Question 1 Which high s	chool did you attend?	EDIT INFO
Question 2 What is the fi	ïrst name of your eldest nephe	ew/niece?
Question 3 What is your	grandfather's middle name (v	our mother's father)?
Question 4	-	

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

•

• You should receive a Success page if you successfully registered.



Checking your account balance(s)

Navigate to the *benefit account summary* page to access a quick view of your account balance(s). Each of your accounts displays in its own box, and provides at-a-glance details regarding your balance, funds spent, and important dates.

	(0)/01/2010-12/31/2010)	Account Summary		election has been spent, and how much is still available.
		Annual Election	\$1,456 .00	
	Available Balance	Payroll Deposits YTD	\$1,568. ⁹⁹	
		Spent	(\$866 . ⁵¹)	
\$1,456.00	Spent \$866. ⁵¹	Balance	\$589. ⁴⁹	Important dates, such as the last
		Deadlines		day to spend funds, and the last
		Plan Start	Jan 1, 2016	day claims can be submitted.
		Plan End	Dec 31, 2016	
		Last Day to Submit Claims	Mar 31, 2017	
		Last Day for Spending	Dec 31, 2016	
() VIEW DETAILS (S) TRANS	SACTIONS			Links to additional account details, transactions, and claim submission forms.

Submitting expenses and filing claims

FSA Member Portal allows you to enter new claims and expenses, as well as view and edit pending claims. If you have receipts or documentation to substantiate your claim, you can attach these to expedite the reimbursement process.

What is the difference between a claim and expense?

- **Claim.** Claims are simply reimbursement requests submitted for costs incurred when receiving eligible services, products, or procedures.
- **Expense.** Expenses are used to track & manage your medical, dental, vision, prescription, and other potentially eligible expenses. Expenses can be manually entered by you. Once entered, expenses can be submitted for reimbursement (just like a claim). Expenses can be submitted now or later.



Submitting a claim

To enter a claim and request reimbursement, navigate to the *add claim* page (by clicking *submit claim* or via the menu bar) and complete the form. Be sure to upload a receipt image if you have one. You can click *browse* to navigate to the file, or you can drag and drop from your computer. Click *submit* to send the request for processing.

	Add (Claim		
- Required Field				
Claimant			Steve Sample	\sim
Reimbursement Method			Card	\sim
] Service Start Date *			select date	台
5) Service End Date *			select date	台
Service Type *			Select One	~
Claim Amount *			\$ 0.00	
Would you like to submit this as a recurring payment?				
V Yes		Х	No	
Yes		Х	No	
Yes Provider Name Comments		X	No	
Yes Provider Name Comments		×	No	
Yes Provider Name Comments		X	No	
Yes Provider Name Comments Upload Receipt*		X	No	BROWSE
Yes Provider Name Comments Upload Receipt *	5	×	No	BROWSE
Yes Provider Name Comments Upload Receipt*	DRAG 8	X DROP	No	BROWSE
Yes Provider Name Comments	DRAG 8 your rece	X DROP ipts here	No	BROWSE
Yes Provider Name Comments Upload Receipt*	DRAG 8 your rece	X DROP lpts here	No	BROWSE

Send payment directly to your service provider. When entering a claim, you can choose to have the reimbursement funds sent directly to you, or you can have payment sent directly to your provider (on your behalf).

If you pay a provider, choose your provider name from the dropdown menu. If you don't see your provider listed, select *add new provider record* to add your provider

Pay provider? *		
V Yes	X No	
Provider Name *	Lahey Clinic	\sim

Viewing claims and expenses

Once entered, claims and expenses can be viewed on the *claims list* page. From here, you can view claim status, attach receipts, and request reimbursement for eligible expenses.

\$100.00	Eligible for Reimbursement	Claim Date of Service: Oct 26, 2016	REQUEST REINBURGEMENT
proved/Paid/Subn	nitted		
(\$32. ⁹⁹)	Paid	Claim Date of Service: Nov 4, 2016 Date of Transaction: Nov 9, 2016	
(\$43. ⁹⁹)	Paid	Claim Date of Service: Nov 3, 2016 Date of Transaction: Nov 9, 2016	
(\$54. ⁰⁰)	Paid	Claim Date of Service: Nov 9, 2016 Date of Transaction: Nov 9, 2016	
(\$8. ⁰⁰)	Paid	Claim Date of Service: Nov 7, 2016 Date of Transaction: Nov 9, 2016	
\$100. ⁰⁰	Submitted	Claim Date of Service: Oct 26, 2016	ADD RECEIPT
	<	Page1of1	
enied			
\$34.00	Denied	Ctaim Date of Service: Nov 9, 2016 Date of Transaction: Nov 9, 2016	

Resolving pending debit card transactions

If you swipe your debit card for eligible products or services, you may be required to submit a receipt or other documentation before the debit card transaction can be approved. To aid in resolving pending debit card transactions, you can take the following action:

- **Step 1.** Navigate to the *transactions* page.
- Step 2. Located the pending transaction (using the search filters)
- **Step 3.** Click to expand the transaction, and click *add receipt* to attach your supporting documentation to the transaction.

â	My Accounts \smallsetminus	Claims \sim	Re
Trans	Account Summary	/	
Year	View Transaction History		Plan

We will review the documentation you've submitted and update the transaction accordingly.

h transactions do you wa	nt to see? Select here 🗸			
pproved/Posted	Pending/Processing 🛛 💕 Denie	ed		♀ SEARCH FOR TRANSACTION
(\$40.00)	Dependent Care FSA Pending	Card	Feb 27, 2017	
Date Of Service	Feb 27, 2017		RECEIPTS	ADD RECEIPT
Description	DR. SMITH		No receipts to display.	
Claimant	NewApp Two			
Account Type	DCA			
Plan Start Date	Jan 1, 2017			
Plan End Date	Dec 31, 2017			
Merchant Name	DR. SMITH			

Updating your user profile

To access and edit your user profile, click the username hyperlink on the right side of the navigation bar. From this page, you can:

- 1. Update your e-mail address
- 2. Change your password



The image below shows where each item in the list above is located.

Accounts \sim Claims \sim Resources \sim			Last loger 36am on New 24, 2018
Profile			
0	Phone Email Address <u>edit delete</u>	O Home Address	change password
change picture	P -2		
Date of Birth no data	(副自)書) Employer		
Employee ID	University Medical Center of E Paso	EL.	
Marital Status None	SSN no data Employee Status		
Gender	Active		

Managing alerts & messages

The bell icon in the navigation bar indicates when you have unread alerts awaiting your review. Depending on your communication preferences and your group's setup, these alerts could be anything from confirmation of an email address or password change, to notification that a claim you submitted has been received, to an alert that a card



transaction was denied, to a wide variety of other communication types.

Alerts			
SMS Finail		♀ SEARCH FOR ALERTS	ô 🗆
Feb 14, 2017	Password Change Your password has changed		
Feb 14, 2017	EmployeeEmailAddressChangePartnerAlert Email Address Changed		
Feb 14, 2017	DepositReceivedPartnerAlert Contribution Received		
	Page 18 of 18 > show all		

Click on an individual message to see the full text:

The envelope icon in the navigation bar indicates when you have unread messages awaiting review. These messages include copies of manual claim letters, receipt notification letters, and reimbursement letters. Similar to alerts, you can simply click any message item to see the letter text in full.

ř Č E		
lessages		_
Vunread Read	Q SEARCH FOR M	
May 1, 2018 Pending Letter		
Apr 17, 2018 Pending Letter		
Apr 17, 2018 Denial Letter		
	< Page1of1 >	

	Ale	rt Details					×
Feb 14, 2017 1:31 pm noreply@yourtpa.com							
Your password has	changed						
Administrator Name:	Consumer Funding Solutions						1
Administrator Address:	10 Main Street Beverly, MA 01915						
Employer Name:	Sample Group						- 1
Participant Name:	John Tester						- 1
Password Chan You have successfully up If you have any question 888-888-8989 Thank you, WealthCare Demo Admi	dated your password information for ac s or concerns, please contact us at: nistrator	ccessing the Wealth Can	e Portal.	PRINT	×	CLOSE	
							_

Changing your alert preferences and updating your phone number

You can change whether you receive certain alert types, as well as how you receive them from the *communication settings* page. This page can be accessed by clicking the sprocket symbol in the navigation bar.

You may choose, for each alert type, whether you receive it via mobile, email, both, or neither. Click *save* when you are done editing your preferances. You can also use this page to update your email address, and to register your mobile phone for SMS text alerts.

Manage your account from your mobile phone

Step 1: Login to your Preferred Administrators online account access portal

https://preferredadmin.wealthcareportal.com





Step 2: On the home page, Navigate to the "Settings Icon" and click on it to go to the next page.

Preferred ADMINISTRATORS	 5477-532-3778 performation proposition that the same 			0	Settings
		₩ @ 9	800	0	The Section of the se
Personal Dashboard				<u> </u>	
🖻 My Accounts		- 1		FSA Store	
Partyrat to show 🛛 🗧 Pressue	St Conett 🗉 Future			00000 4 0000 5	Inible
Rexible Spending Account - UMCI8FSA	(0/0/207-0/10/208		Product	s with One (lickt
	1		544	o FSA Store New	
Available \$0.10	Sport S		-		
Rexible Spending Account	(6/0.201-0/10/20R)		100		
UMC19F5A			2	1000	0/21
Available S	Seet	③ My Re	cent Trans	sactions	
		(\$30.50)	Flexible Spending Account	Approved	Card Nov 28, 2018
My Alerts		ature The	Fiesdale		Cet
Right new you're only recan	ing email alerts. Click below to	(\$15.")	Spending Account	Approved	Nov 22, 2018
and get real-time balance is	pdates?	1012 (0)	Fiesible	Annual	Card

Step 3: To enter your "Mobile Phone Number" select the box "Add Number".

Communication Settings	
Assigned Notifications	Email Address
You are opted in to one or more mobile communications, but do not have a mobile number registered. You will not receive these communications unders you register a mobile number.	Byahoa.com 🥒 🗑
The notifications below are available to you. Please define the delivery method for each motification pice with to receive Please ensure you have an email address and/or registered mobile in order to receive these notifications.	Phone Registration Status ADD NUMBER
reptile what both norm	Click Add Numbe
Card Lost/Stolen	
This communication is sent when your card has been marked as "LooV Stolen".	
Card Transaction Derived	
This communication is sent when your card is derived at the point of sale. It will outline why the denial has documed.	
Year End Reminder	
This communication will be sent Groce, 8 days prior to your plan's year and date. This is to reinnal you that you have briefed time to science claims for reinnaurisement. You will anly release this communication if you have active accounts and you have activity in your account.	

Step 4: The Add mobile phone number page will display, enter you mobile number and accepted the "Terms and Conditions" and click submit.

S Add Mobile Number × En Ph	nter Mobile none Number
nt or Res tings Mobile Number *	nter Mobile none Number
Message and Data Rates may apply.	
Message and Data Rates may apply.	
include include in cost of our offer	
To receive help text HELP to 97487 or call	
red in to one 614.444.444	
Carriers include:	
eron below eron atst Tr - Mobile-	
Investments Investments	
Google Voice Cricket	
metroPCS. Cincinnati Bell'	
Sprint TRACEONE	
spinit, spinit	
t when your I accept <u>Terms and Conditions</u> and <u>Privacy Policy</u> *	
Indue Limited Indue active accounts and you have activity	

Step 5: It will redirect you back to the previous page and the mobile phone number will display a status of "Pending" until you complete the registration process using your mobile phone number.

Accounts - Claims - It	essarces — Vid	e05			
nmunication Settings					
ssigned Notifications					🖂 Email Address
() The notifications belo delivery method for e ensure you have an er order to receive these	w are available to yo wh notification you nail address and/or notifications.	ou Please wish to re registered	define the ceive. Pleas d mobile in	*	testtest@yahoo.com 🥒 👕
	mobile	(A) email	both	(X) none	Phone Registration Status 915-000-000 Pending Pending Pending
ard Lost/Stolen	•				You will receive a text to the number shown above asking you to
his communication is sent when y	our card has been in	arked as "L	ust/Stolen		complete the registration process. Once registered, your phone's status will show as Registered instead of Pending, if your number remains in
and Transaction Denied					Pending status or if you never receive the registration text, please contact support for assistance in resolving the issue. Once registered,
his communication is sent when y iny the denial has occurred.	our card is denied at	the point of	of sale. It will	Loutine	text B4L to 97487 to receive your current year account balances. You can opt-out at anythme by feating STOP. For help with text commands, please text HELP to 97487.
ear End Reminder			•		
his communication will be sent Or its remind you that you have limit vill only receive this communicatio	ce, 0 days prior to y ed time to submit cla h if you have active a	our plan's arms for re recounts a	year end da mbursemen nd you have	te This n. You activity	

Step 6: The following text message will be sent to the mobile device.



Step 7: To complete the registration steps you must reply to the text message with a "Y".

You will next receive a text message which confirms the registration of the mobile device.

Step 8: Once you have completed all of the registration steps, the web portal status for the mobile number will change to "Registered".

😰 Accounts Claims Messurem Videos						
Communication Settings						
Assigned Notifications					🖂 Email Address	
The motifications below a debuery method for each ensure you have an email order to receive these ro	ny available to net/fication yo Labbress and/s offications.	you, Please a with to re a registere	defina the carve. Pleas d mobile in	-	testtest@yahoo.com 🥒 🕸	
		~	-	10	D Phone Registration Status	
	mobile		both	none	915-000-0000 Reported	Registere
Card Lott/Skilan					You will receive a text to the number shown above asking you to	
This communication is sent when your	card has been r	nahad at "	unit/Steller		will show as flegistered instead of Pending, if your number remains in	
Card Transaction Denied					 contact support for assistance in resolving the issue. Once registered. 	
This communication is sent when your why the dwnail has occurred.	card IC derived a	t the point i	fsie to	Loutine	twitt Birk 15 97487 to innonine your contrets your account bulances. You can upt-out at anytismic type latiting STOP. For help with text commands, plasse text HOLP to 97487.	
Valar End Flamindan						
This communication will be sent Once, is to remind you that you have limited in will any receive this communication if on your account.	O days prior to sme to submit o you have active	your plan's Sams for re Accounts an	year end da indurseme nd you have	dia This rt. You I althrity		

Step 9: Text BAL to receive your current balance

To request FSA Balance, text Bal to 97487 and to stop receiving mobile alerts, text STOP to 97487.



- 10. To stop receiving mobile alerts, text STOP to 97487.
- 11. To change or unregister your Mobile Number click : Unresgister"

The notifications below a delivery method for these email is not an available or have an active email ad lutted on the right.	e available to notifications, elivery metho tress and regi	you. Please f mobile ni 5. please m stered mol	define the umber and/ sake sure yo bite numbe	or bu r	testtest@yahoo.com	
	mobile	(C) email	both	(X) none	915-000-0000 Percing	Click to register and unregister phone
ecount Balance Alert					You will, receive a text to the number shown above asking you to complete the registration process. Once registeries, your phone's status will show as Reportend indexed of Pendion, If your guides remains in	
ecount Deductible Met					Pending status or if you never receive the registration text, please contact support for assistance in resolving the base. Once registered.	
Mung Address Change					text BA, to 97487 to receive your current year account balances. You can opt-out at anyone by texting STOR For help with text commands, please text HSLP to 97487.	
Land Mailed						
Card Transaction Approved						
Card Transaction Derved						
Completed HSA Poyment Notice				٠		
Deposit Received						
Inrollee Welcome Empli		۰				
lated HSA Poyment Notice						
Ashuat Claim Entered		۲				
Password Change						
lear End Reminder		۲				
\checkmark	SAVE					