



Participant Portal

How Do I...

A guide to the
BenefitWallet portal

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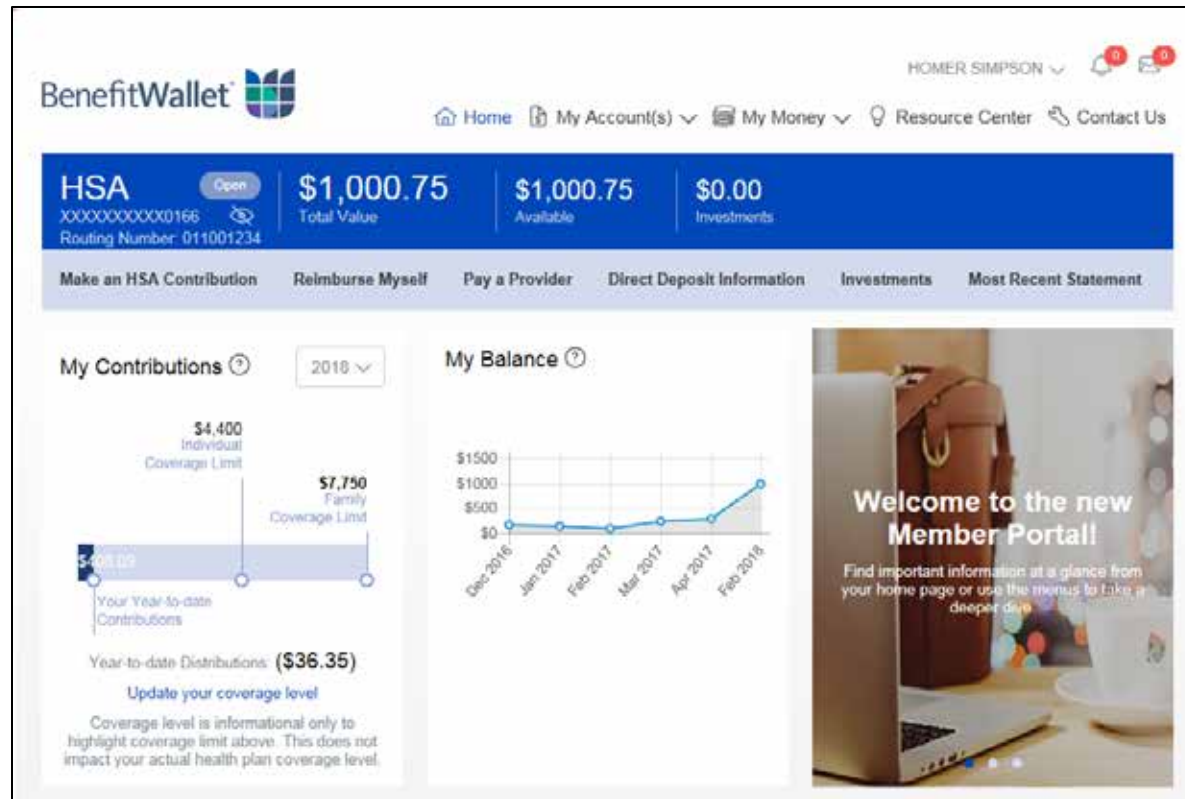
How do I access forms and educational materials?

What Can I Find on the Home Page?

Account
Balance →

Important
graphs →

Transactions →



How Do I Access Recent Account Activity

View recent account activity directly from the bottom of the home page.

Transactions	My Scheduled Transactions	My Processed Contributions	My Processed Payments			
Date	Type	Description	Debit	Credit	Tax Year	
01/31/2018	INTEREST POSTED	INTEREST POSTED THROUGH 01/31/2018		\$0.06	2018	
01/19/2018	PAYROLL CREDIT	EMPLOYER PAYROLL CREDIT		\$5.00	2018	
01/19/2018	PAYROLL DEBIT	EMPLOYEE PAYROLL DEBIT	\$2.00		2018	
01/19/2018	PAYROLL DEBIT	EMPLOYER PAYROLL DEBIT	\$2.00		2018	
01/19/2018	PAYROLL CREDIT	EMPLOYEE PAYROLL CREDIT		\$5.00	2018	
01/18/2018	MISC FEE	ATM WITHDRAWAL FEE 09	\$2.00		2018	
01/18/2018	POS CREDIT	SONORAN DESERT EYE CENTER CHANDLER AZ		\$44.00	2018	

[More transactions](#)

How Do I Make Payments and Reimbursements?

Select
*Reimburse
Myself*
or
*Pay a
Provider*
from the
quick links

The screenshot shows the BenefitWallet HSA portal. At the top, the user is identified as HOMER SIMPSON. The main dashboard displays the HSA account status: Total Value of \$1,000.75, Available balance of \$1,000.75, and Investments of \$0.00. A navigation bar includes quick links: Make an HSA Contribution, Reimburse Myself (highlighted with a red box), Pay a Provider, Direct Deposit Information, Investments, and Most Recent Statement. Below this, there are two main sections: 'My Contributions' and 'My Balance'. The 'My Contributions' section shows a progress bar for 2018 contributions, with a year-to-date total of \$498.05. It also displays coverage limits: \$4,400 for Individual and \$7,750 for Family. The 'My Balance' section features a line chart showing the account balance from Dec-2016 to Feb-2018, with values ranging from approximately \$0 to \$1,000. A promotional banner on the right reads 'Welcome to the new Member Portal!' and encourages users to find important information at a glance.

BenefitWallet

HOMER SIMPSON

Home My Account(s) My Money Resource Center Contact Us

HSA **Open**

XXXXXXXXXX0166
Routing Number: 011001234

\$1,000.75 Total Value

\$1,000.75 Available

\$0.00 Investments

Make an HSA Contribution **Reimburse Myself** Pay a Provider Direct Deposit Information Investments Most Recent Statement

My Contributions 2018

\$4,400 Individual Coverage Limit

\$7,750 Family Coverage Limit

\$498.05 Your Year-to-date Contributions

Year-to-date Distributions: **(\$36.35)**

[Update your coverage level](#)

Coverage level is informational only to highlight coverage limit above. This does not impact your actual health plan coverage level.

My Balance

Dec-2016 Jan 2017 Feb 2017 Mar 2017 Apr 2017 Feb 2018

Welcome to the new Member Portal!

Find important information at a glance from your home page or use the menus to take a deeper dive.

How Do I Set Up HSA Alerts?

Hover over the bell icon in the top right of the page and select *Alerts*

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HOMER SIMPSON 🔔 0 ✉️ 0

Home My Account(s) My Money Resource Center Contact Us

HSA Open

XXXXXXXXXX0166 🔍
Routing Number: 011001234

\$1,000.75 Total Value

\$1,000.75 Available

\$0.00 Investments

Make an HSA Contribution Reimburse Myself Pay a Provider Direct Deposit Information Investments Most Recent Statement

My Contributions ? 2018 ▼

\$4,400 Individual Coverage Limit

\$7,750 Family Coverage Limit

\$468.05 Your Year-to-date Contributions

Year-to-date Distributions: **(\$36.35)**

[Update your coverage level](#)

Coverage level is informational only to highlight coverage limit above. This does not impact your actual health plan coverage level.

My Balance ?

\$1500
\$1000
\$500
\$0

Dec-2016 Jan 2017 Feb 2017 Mar 2017 Apr 2017 Feb 2018

Welcome to the new Member Portal!

Find important information at a glance from your home page or use the menus to take a deeper dive.

How Do I Order Checks?

Go to
Order Checks
from the
My Money Menu

Note: You must submit a Master Signature Card before receiving a checkbook. To download your Master Signature Card, go to the Resource Center

The screenshot shows the BenefitWallet user interface. At the top, the user is identified as HOMER SIMPSON. The navigation bar includes Home, My Account(s), My Money, Resource Center, and Contact Us. The 'My Money' menu is open, displaying an HSA account summary with a total value of \$1,000.75 and an available balance of \$1,000.75. The menu options include Contribution Center, Payment Center, My Health Plan Claims, My Filing Cabinet, My Debit Cards, Order Checks (highlighted with a red box), and Investments. Below the menu, there is an 'HSA Contribution' section with an 'Important Note' and a progress indicator showing '1 Contribution' and '2 Verify'.

How Do I Access HSA Statements?

Select *Most Recent Statement* from the quick links and select the statement to view

The screenshot displays the BenefitWallet HSA portal. At the top, the user is identified as HOMER SIMPSON. The main header shows the HSA account number (XXXXXXXXXX0166) and routing number (011001234). The account balance is \$1,000.75, with \$1,000.75 available and \$0.00 in investments. A navigation bar includes links for 'Make an HSA Contribution', 'Reimburse Myself', 'Pay a Provider', 'Direct Deposit Information', 'Investments', and 'Most Recent Statement', which is highlighted with a red box. Below the navigation bar, there are two main sections: 'My Contributions' and 'My Balance'. The 'My Contributions' section shows a bar chart for 2018 with a year-to-date contribution of \$498.09. It also lists coverage limits: \$4,400 for individual and \$7,750 for family. The 'My Balance' section shows a line chart of the account balance from Dec-2016 to Feb-2018, with a balance of \$1,000.75 as of Feb-2018. A 'Welcome to the new Member Portal!' banner is visible on the right side of the page.

BenefitWallet

HOMER SIMPSON

Home My Account(s) My Money Resource Center Contact Us

HSA **\$1,000.75** **\$1,000.75** **\$0.00**
XXXXXXXXXX0166 Total Value Available Investments
Routing Number: 011001234

Make an HSA Contribution Reimburse Myself Pay a Provider Direct Deposit Information Investments **Most Recent Statement**

My Contributions 2018

\$4,400 Individual Coverage Limit
\$7,750 Family Coverage Limit
\$498.09 Your Year-to-date Contributions
Year-to-date Distributions: (\$36.35)
Update your coverage level
Coverage level is informational only to highlight coverage limit above. This does not impact your actual health plan coverage level.

My Balance

\$1500
\$1000
\$500
\$0
Dec-2016 Jan 2017 Feb 2017 Mar 2017 Apr 2017 Feb 2018

Welcome to the new Member Portal!
Find important information at a glance from your home page or use the menus to take a deeper dive.

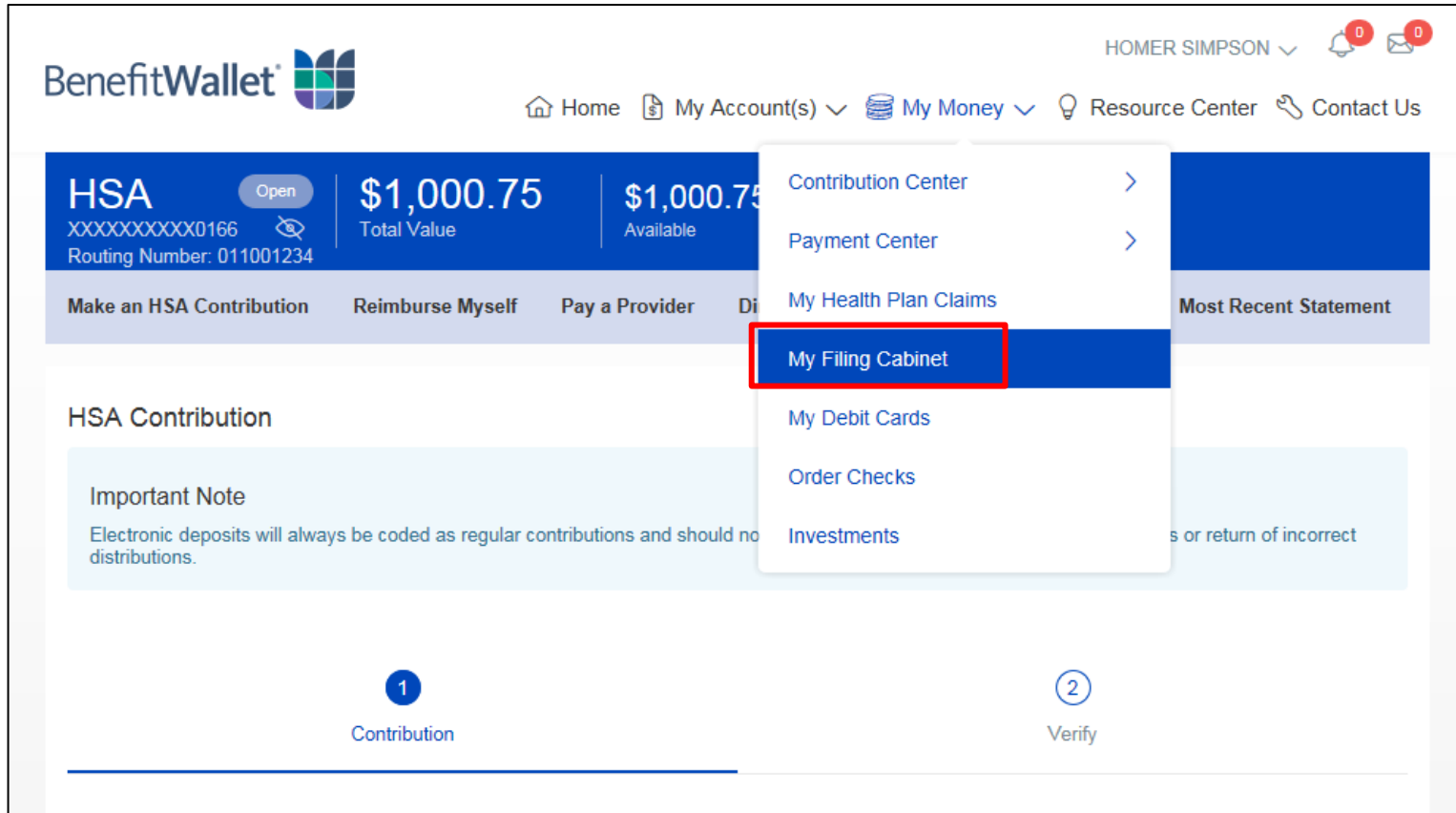
How Do I Reorder a Debit Card?

Go to *My Debit Cards* from the My Money Menu

The screenshot displays the BenefitWallet user interface. At the top left is the BenefitWallet logo. The top right shows the user name 'HOMER SIMPSON' and notification icons. The main navigation bar includes 'Home', 'My Account(s)', 'My Money', 'Resource Center', and 'Contact Us'. The 'My Money' dropdown menu is open, listing several options: 'Contribution Center', 'Payment Center', 'My Health Plan Claims', 'My Filing Cabinet', 'My Debit Cards' (highlighted with a red box), 'Order Checks', and 'Investments'. Below the menu, the 'HSA Contribution' section is visible, showing a balance of \$1,000.75. At the bottom, a progress indicator shows '1 Contribution' and '2 Verify'.

Where is my HSA Filing Cabinet?

Go to *My Filing Cabinet* From the My Money menu



How Do I Access Forms and Educational Material?

Go to the
Resource
Center

The screenshot displays the BenefitWallet user interface for an HSA account. At the top, the user is identified as HOMER SIMPSON. The account balance is shown as \$1,000.75 Total Value, with \$1,000.75 Available and \$0.00 in Investments. A navigation bar includes links for Home, My Account(s), My Money, Resource Center, and Contact Us. Below the account summary, a menu offers actions like Make an HSA Contribution, Reimburse Myself, Pay a Provider, Direct Deposit Information, Investments, and Most Recent Statement. The Resource Center is prominently featured, containing three main sections: HSA Education Materials, Videos, and Forms. Each section lists specific resources with expandable icons.

BenefitWallet HOMER SIMPSON

Home My Account(s) My Money Resource Center Contact Us

HSA [Open](#) **\$1,000.75** **\$1,000.75** **\$0.00**
XXXXXXXXXXXX0165 Total Value Available Investments
Routing Number: 011001234

Make an HSA Contribution Reimburse Myself Pay a Provider Direct Deposit Information Investments Most Recent Statement

Resource Center

- HSA Education Materials**
 - HSA Overview
 - Five Reasons to Open Your HSA
 - Investments
 - Making HSAs Work for You
 - HSA/FSA/HRA Compare
 - HSA Transfer Process
 - HSA Eligible Expenses
- Videos**
 - HSA Overview
 - HSA Tax Savings
 - Tax Guidelines for HSAs
 - HSA Tax Forms
- Forms**
 - Personal Information
 - Master Signature Card
 - Additional Signature Authorization Form
 - Reopen Account Form
 - Personal Data Change Form
 - Beneficiary Designation Form
 - Durable Power of Attorney

Additional Information

If you have questions, please contact the BenefitWallet Service Center by going to *Contact Us*.

The screenshot displays the BenefitWallet member portal interface. At the top right, the user is identified as HOMER SIMPSON. Navigation links include Home, My Account(s), My Money, Resource Center, and Contact Us (highlighted with a red box). The main account summary shows an HSA with a Total Value of \$1,000.75, Available balance of \$1,000.75, and Investments of \$0.00. Below this, a menu offers options like Make an HSA Contribution, Reimburse Myself, Pay a Provider, Direct Deposit Information, Investments, and Most Recent Statement.

The 'My Contributions' section for 2018 shows a bar chart with the following data:

Category	Amount
Individual Coverage Limit	\$4,400
Family Coverage Limit	\$7,750
Your Year-to-date Contributions	\$498.05
Year-to-date Distributions	(\$36.35)

The 'My Balance' section features a line chart showing the account balance over time from Dec-2016 to Feb-2018, with values ranging from \$0 to \$1,000. A promotional banner on the right reads 'Welcome to the new Member Portal!' and encourages users to find important information at a glance.

BenefitWallet®

