Benefit Extras, Inc.
P.O. Box 1815
Burnsville, MN 55337
Phone: (952) 435-6858 (Toll-free 1-866-435-6858)
Fax: (952) 435-8435 (Toll-free 1-800-886-8793)
www.benefitextras.com

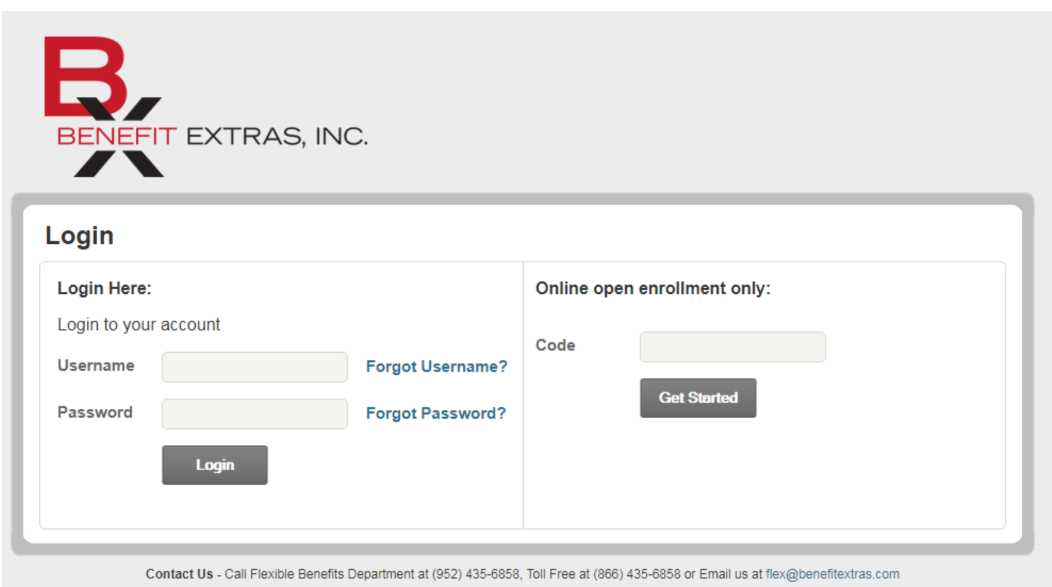
Consumer Portal Quick Start Guide

Welcome to Benefit Extras' Online Consumer Portal. This one-stop portal gives you 24/7 access to view information and manage your tax-favored accounts (Flexible Spending Account (FSAs), Health Reimbursement Arrangement (HRA), Parking and/or Transit Account) as administered by Benefit Extras.

- File a claim online (**Note**: not applicable for all Plans)
- Upload itemized bills and track expenses
- View up-to-the-minute account balances
- View your account activity, claims history and payment (reimbursement) history
- Update your personal profile information
- Change your login ID and/or password
- Download plan information, forms and notifications
- Report a lost/stolen debit card and request a new one (When debit cards are included in your Plan)

HOW DO I LOG IN?

- Go to www.benefitextras.com. Click on "Employees" at the top of the Home Page and from the Employee Page click on the "Log In" for Tax-Advantaged Plans.
- Enter your login username and password (first time users will be provided log in information on their enrollment confirmation notice sent by Benefit Extras).
- Click **Login**.



All the information you need to view & manage your account(s) can be found under these 4 headings:

- **Home** – This page is easy to navigate:
    - Easily access the **I Want To** section to file a claim
    - The **Tasks** section displays alerts and relevant links that enable you to keep current on your accounts
    - The **Accounts** section displays your account(s) and Available Balance(s)
    - The **Recent Transaction** section displays the last 3 transactions that occurred on your account
    - The **Quick View** section graphically displays some of your key account information

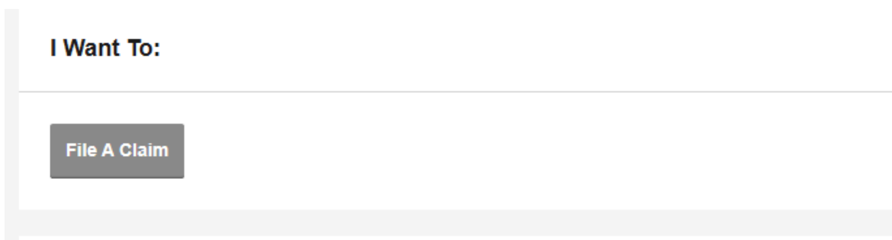
- **Accounts** – 3 columns are listed for you to view & manage your account(s)
    - The **Accounts** column lets you view detailed information regarding your Claims, Payments, Statements, Account Activity as well as Personal Records
    - The **Profile** column is where you can manage your Profile/Dependents, Banking/Cards, Payment Method & Login information
    - The **I Want To** column allows you to file a claim

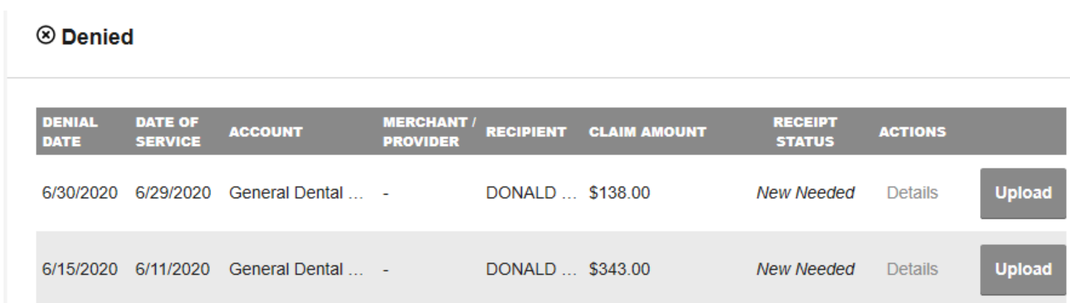
- **Tools & Support** – This page provides the following:
    - View/Print **Documents & Forms** & **Plan Summaries** that are related to your account(s)
    - **How Do I** gives you links to 'Change Payment Method' or 'Update Notification Preferences' to name a few
    - At the bottom of the page there is **Benefit Extras'** contact information & **Quick Links** to determine the eligibility of medical expenses

- **Message Center** – View auto generated letters & statements
    - View multiple letters which *could* include Enrollment, Denied Claims & Advice of Deposit (Direct Deposit only). The letters available for you to view will depend on the type of account(s) you're enrolled in.
    - For **WEX Health Debit Card** holders, notifications of when receipt(s) are needed to substantiate a claim will be listed here
    - Links to **Update Notification Preferences** & **View Statements** are also provided

HOW DO I FILE A CLAIM AND UPLOAD AN ITEMIZED BILL?

- On the **Home** Page, simply click on "**File a Claim**" under the **I Want To** section **<u>OR</u>** expand the **Accounts** tab on the top of the screen.
- The claim filing wizard will walk you through the request including entry of information & payee details and uploading a receipt.
- For submitting more than one claim, click **Add Another**, from the **Transaction Summary** page.
- When all claims are entered in the **Transaction Summary**, agree to the terms and conditions, click **Submit** to send the claims for processing.
- 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 must upload the receipt from this screen.





DENIAL DATE	DATE OF SERVICE	ACCOUNT	MERCHANT / PROVIDER	RECIPIENT	CLAIM AMOUNT	RECEIPT STATUS	ACTIONS	
6/30/2020	6/29/2020	General Dental ...	-	DONALD ...	$138.00	*New Needed*	Details	Upload
6/15/2020	6/11/2020	General Dental ...	-	DONALD ...	$343.00	*New Needed*	Details	Upload

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 claims that require additional documentation. You can easily upload the receipts from this page. Simply click the **Upload** button.

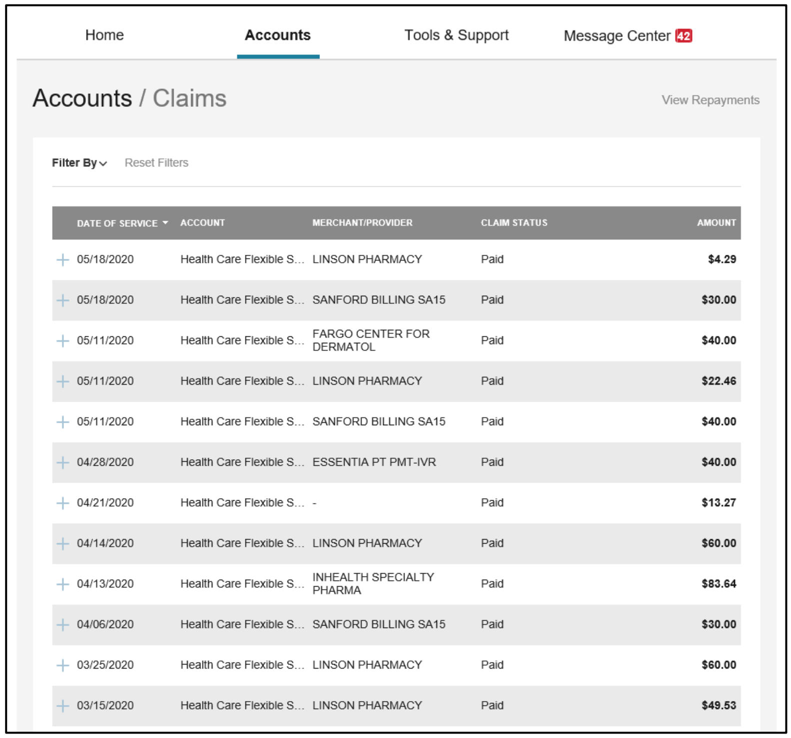
HOW DO I VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY?

- For current Account Balance(s) only, on the **Home** Page see the **Accounts** section.
- For <u>all</u> Account Activity, hover over the **Accounts** tab and click on **Account Summary**. Then you may select the underlined dollar amounts for more detail. For example, click on the amount under "Eligible Amount" to view election details. For claim details, click on the dollar amount listed under "Submitted Claims."

HOW DO I VIEW MY CLAIMS HISTORY AND STATUS?

- From the dropdown under the **Accounts** tab, click on **Claims**. You can filter by Plan Year, Account Type, Claim Status or Receipt Status.

- You can expand the data to display additional details about the claim and to view your claim confirmation letter. Simply click on the **+** in front of the date of the claim you wish to view.

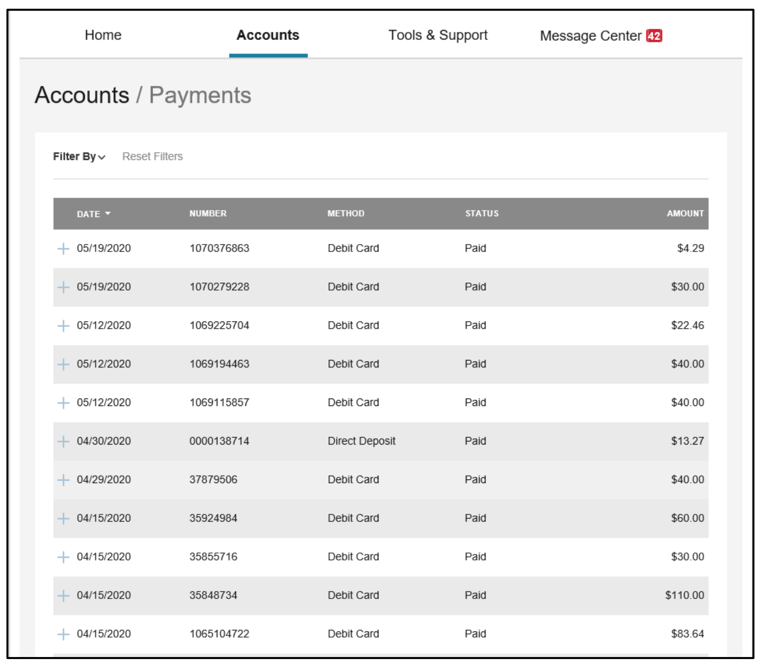


DATE OF SERVICE	ACCOUNT	MERCHANT/PROVIDER	CLAIM STATUS	AMOUNT
05/18/2020	Health Care Flexible S...	LINSON PHARMACY	Paid	$4.29
05/18/2020	Health Care Flexible S...	SANFORD BILLING SA15	Paid	$30.00
05/11/2020	Health Care Flexible S...	FARGO CENTER FOR DERMATOL	Paid	$40.00
05/11/2020	Health Care Flexible S...	LINSON PHARMACY	Paid	$22.46
05/11/2020	Health Care Flexible S...	SANFORD BILLING SA15	Paid	$40.00
04/28/2020	Health Care Flexible S...	ESSENTIA PT PMT-IVR	Paid	$40.00
04/21/2020	Health Care Flexible S...	-	Paid	$13.27
04/14/2020	Health Care Flexible S...	LINSON PHARMACY	Paid	$60.00
04/13/2020	Health Care Flexible S...	INHEALTH SPECIALTY PHARMA	Paid	$83.64
04/06/2020	Health Care Flexible S...	SANFORD BILLING SA15	Paid	$30.00
03/25/2020	Health Care Flexible S...	LINSON PHARMACY	Paid	$60.00
03/15/2020	Health Care Flexible S...	LINSON PHARMACY	Paid	$49.53

HOW DO I VIEW MY PAYMENT (REIMBURSEMENT) HISTORY?

- From the dropdown under the **Accounts** tab, click on **Payments**. You will see all reimbursement payments made to date, including debit card transactions.
  You can filter by Method, Status or Date.

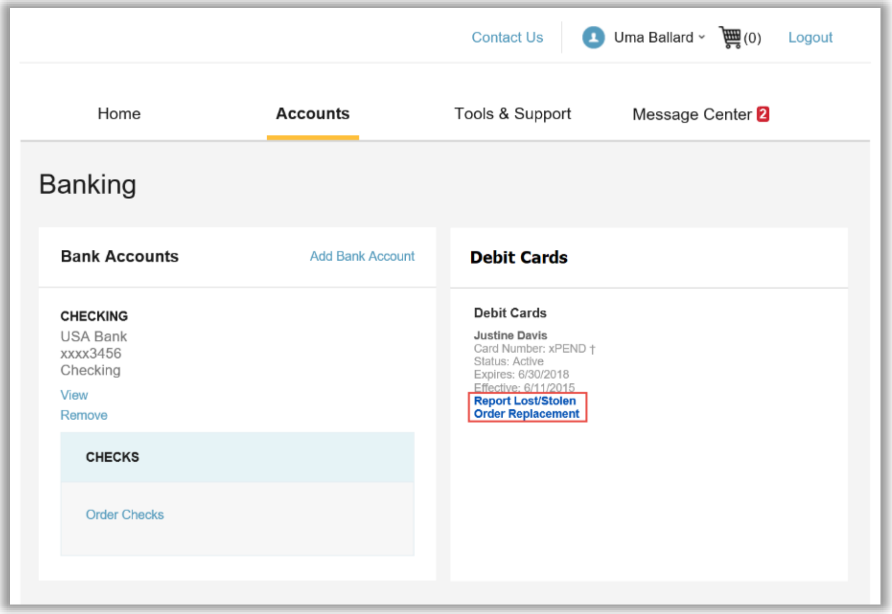
- By clicking on the **+** in front of the date, you can expand the data to display additional details about the transaction.



DATE	NUMBER	METHOD	STATUS	AMOUNT
05/19/2020	1070376863	Debit Card	Paid	$4.29
05/19/2020	1070279228	Debit Card	Paid	$30.00
05/12/2020	1069225704	Debit Card	Paid	$22.46
05/12/2020	1069194463	Debit Card	Paid	$40.00
05/12/2020	1069115857	Debit Card	Paid	$40.00
04/30/2020	0000138714	Direct Deposit	Paid	$13.27
04/29/2020	37879506	Debit Card	Paid	$40.00
04/15/2020	35924984	Debit Card	Paid	$60.00
04/15/2020	35855716	Debit Card	Paid	$30.00
04/15/2020	35848734	Debit Card	Paid	$110.00
04/15/2020	1065104722	Debit Card	Paid	$83.64

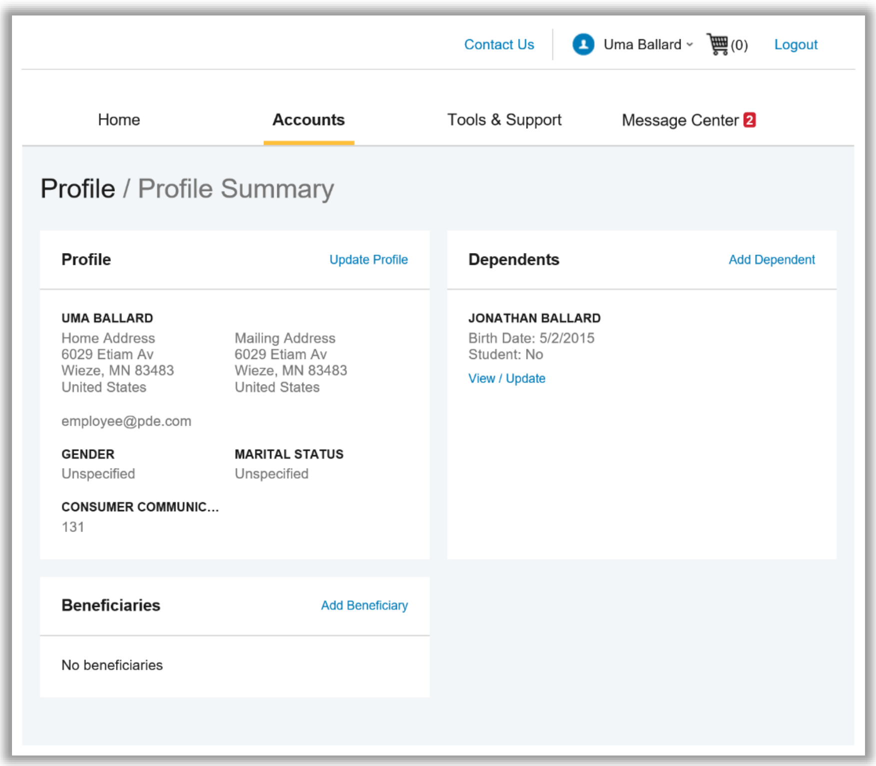
HOW DO I REPORT A DEBIT CARD MISSING AND/OR REQUEST A NEW CARD?

- From the dropdown under the **Accounts** tab, click **Banking/Cards**.
- Under the Debit Cards column, click **Report Lost/Stolen** or **Order Replacement** and follow instructions.



HOW DO I UPDATE MY PERSONAL PROFILE?

- From the dropdown under the **Accounts** tab, click **Profile Summary.** You will find a link to update profile information as well as add/update dependents and beneficiaries. (for HSA accounts only)
- Click the appropriate link on the **Profile Summary** screen to make updates: **Update Profile, Add/Update Dependent** or **Add/Update/Remove** a **Beneficiary**. Some profile changes will require you to answer an additional security question and Beneficiaries will not populate for all types of accounts.
- Complete your changes in the form.
- Click **Submit**.



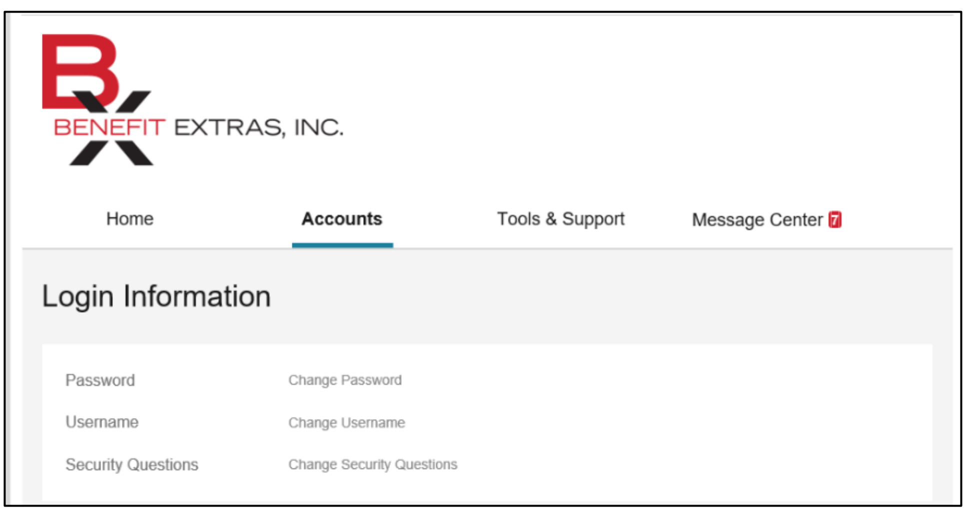
HOW DO I GET MY REIMBURSEMENT FASTER?

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

- From the dropdown under the **Accounts** tab, click **Banking**.
- Click on the 'Add Bank Account' link.
- Add your banking information and click **Submit**.
- Next, click on the **Tools & Support** tab and click **Change Payment Method**.
- You can see the current selections for your Primary and/or Alternate Payment Methods. Click **Update**.
- Select the **Direct Deposit** radio button to change your reimbursement method.
- To change your banking information, click the **Update Bank Account** link.
  (**Note:** this link will not appear if you do not have a bank account already listed)
- The **Payment Method Changed** confirmation displays.
- If there is a bank validation requirement, you will be notified on the portal to look for a small transaction or "micro-deposit" in your designated bank account in the next couple of days to enter online, which will validate your account.

HOW DO I CHANGE MY LOGIN AND/OR PASSWORD?

- From the dropdown under the **Accounts** tab, click **Login Information**.
- Click on the desired link to make your change. (For a new account, the first time you log in, you will be prompted to change the password that was assigned by Benefit Extras'. Follow the instructions.)
- Click **Submit**.



HOW DO I VIEW OR ACCESS:

…DOCUMENTS & FORMS?

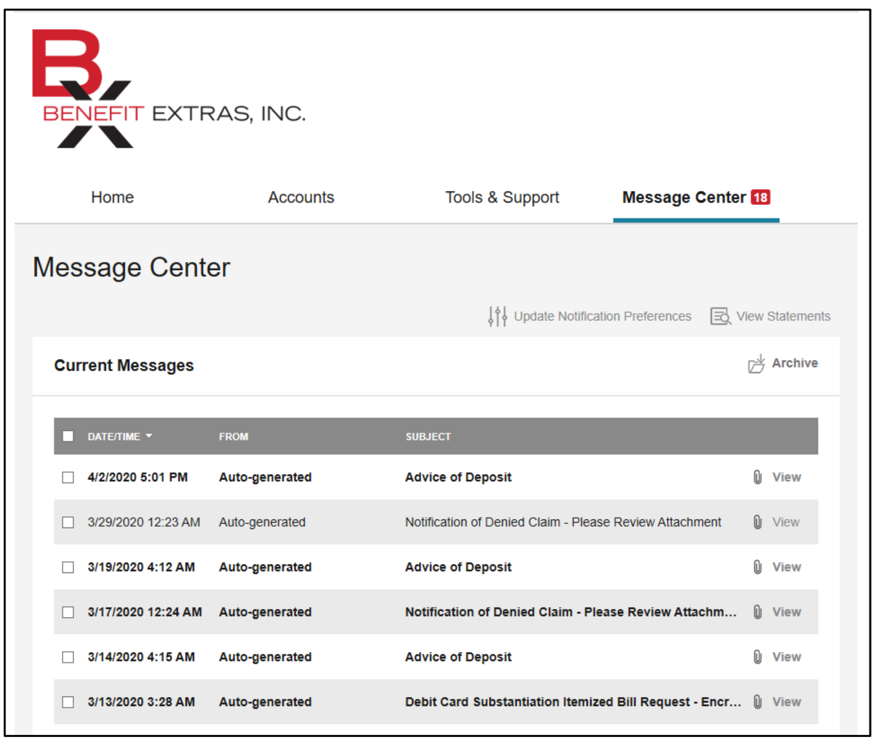
- Click on the **Tools & Support** tab.
- Choose any form or document located on the left-hand side of the page.

…PLAN INFORMATION?

- From the dropdown under the **Accounts** tab, click **Account Summary**.
- Click on the Account name and a pop-up window will open with the **Plan Rules**.
- **OR** click on the **Tools & Support** tab to view **Plan Summaries** located on the left-hand side of the page for basic information. Then click on the applicable plan to see plan details.

…NOTIFICATIONS?

- Click on the **Message Center** tab. (**Note**: you will see the amount of new messages, if any, displayed)
- Click any link of your choice. You will be able to view and archive current documents, as well as reference documents that were previously archived.
- In addition, you can **Update Notification Preferences** by clicking on the link.



MORE HELPFUL INFORMATION

Under the **Tools & Support** tab, there are links that connect you to helpful information supplied by Benefit Extras' which enable you to manage your healthcare more effectively.