Participant/WealthCare Portal User Guide

MyPreTax System

2014

www.hrsimplified.com
fsa@hrsimplified.com

Introduction

Welcome! The MyPreTax "Participant Portal/WealthCare Portal User Guide" is designed to give you, the participant, guidance on how to use the participant portal.

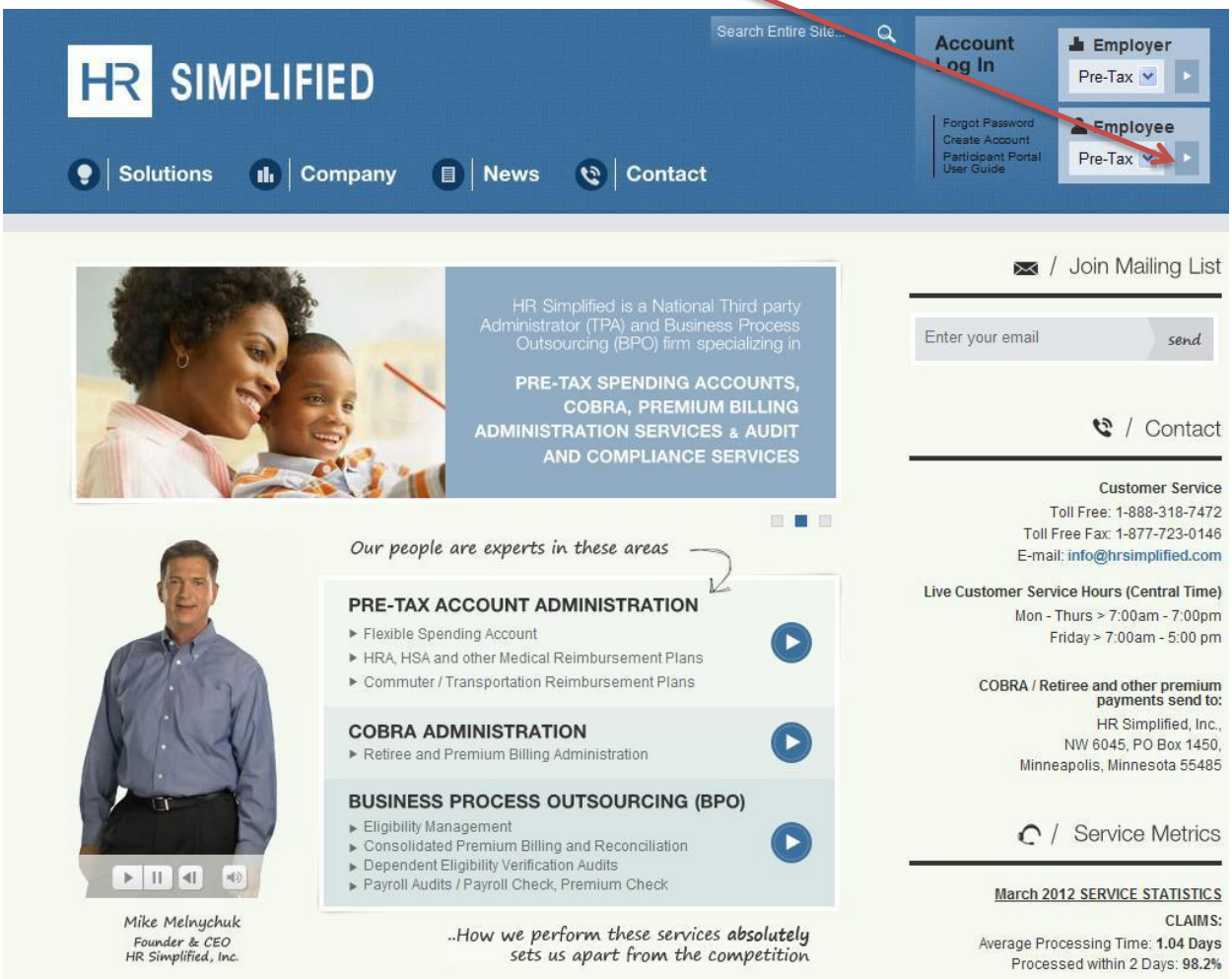
As plan participants, this site allows you to create your own account and access information about your benefit plan and current payment status for items in your accounts.

Participant View

The following sections review the portal from the participants' point of view. This portion of the guide introduces:

Table of Contents

Click on Employee Pre-Tax



Welcome to the HR Simplified Participant/WealthCare Portal

If you have not registered for the site (created a username and password) please do so now.

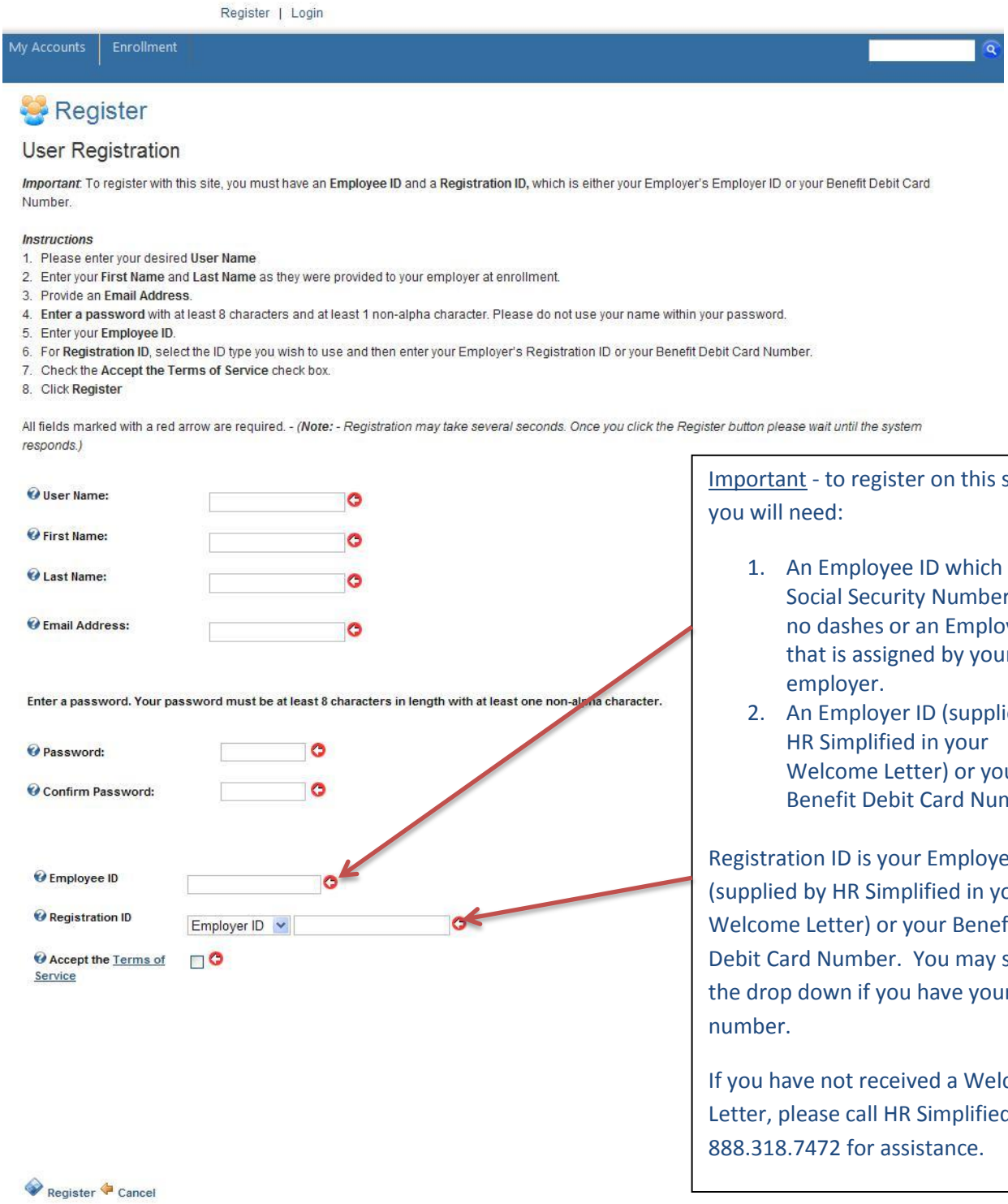
If you have registered and you would like to access your account, please type in your User ID and click continue.

Create Account – First time users

Click on the Employee/Pretax blue arrow.

Begin account creation by clicking on the "Register" button.

If you already have an account created, please go to page 11 for help with access and use of your account.

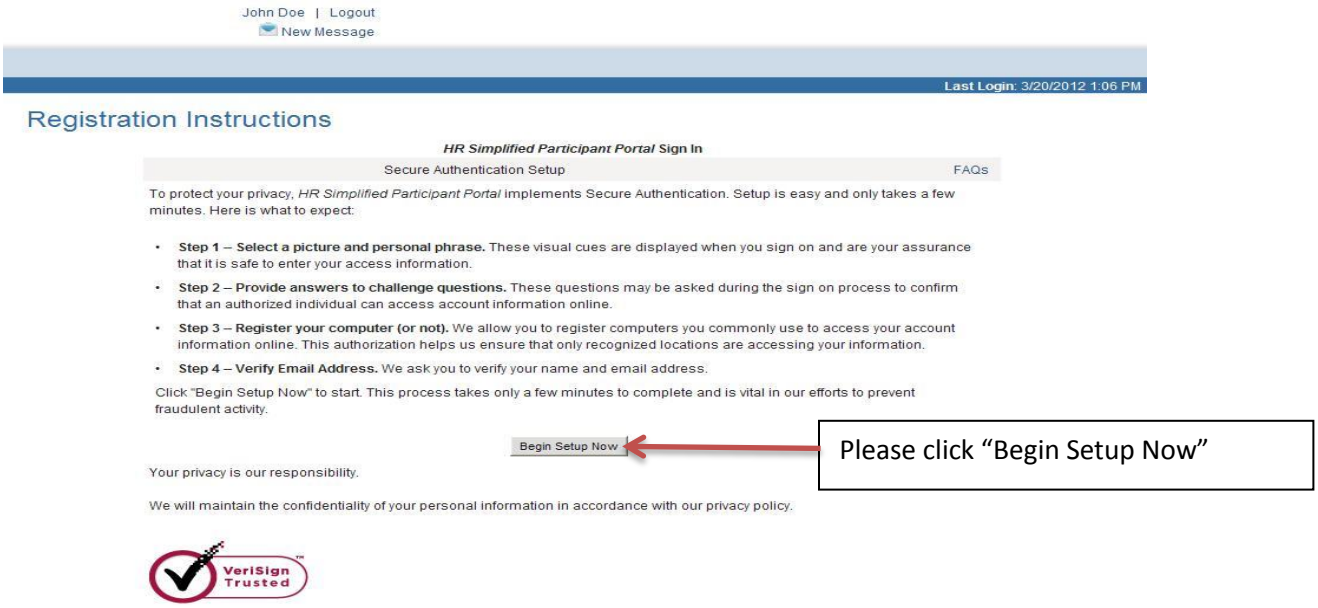


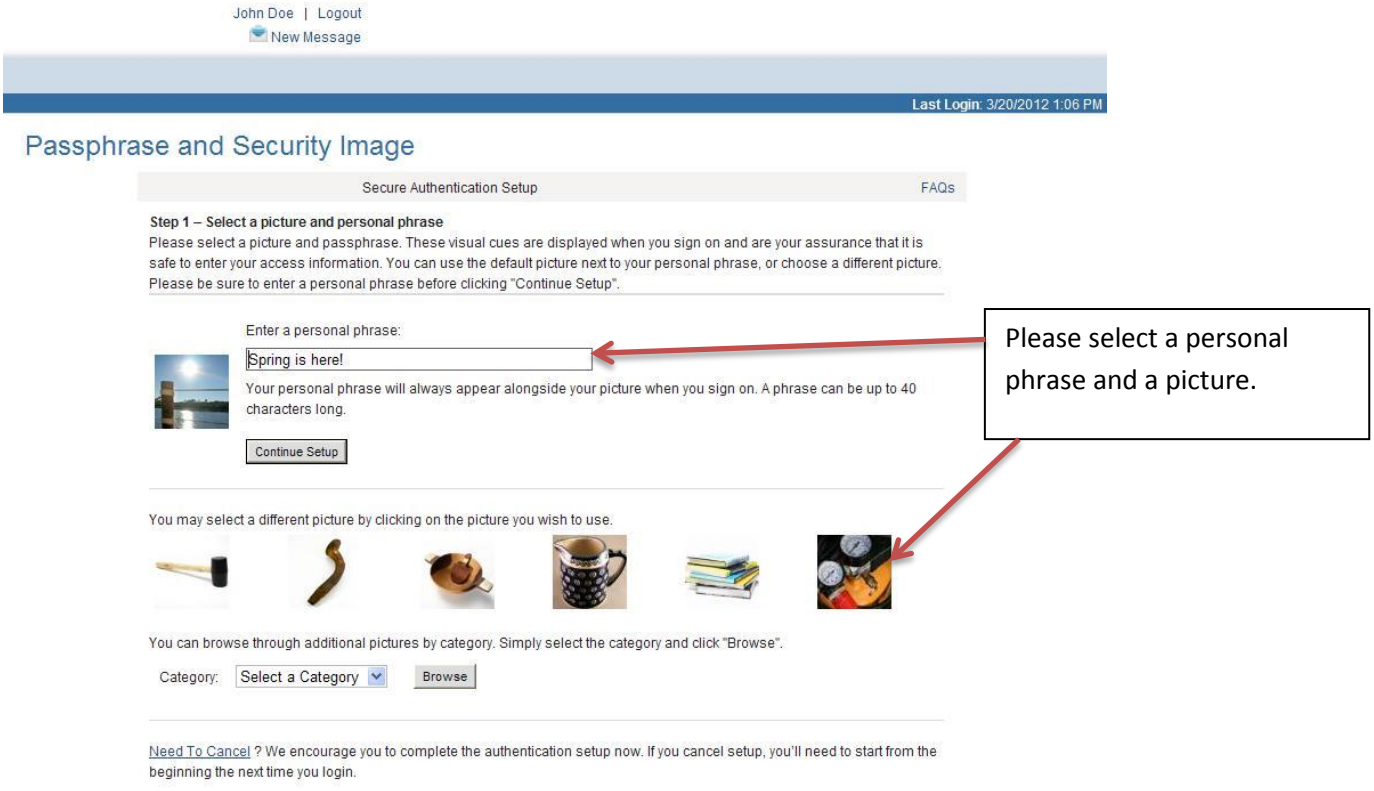
Important - to register on this site you will need:

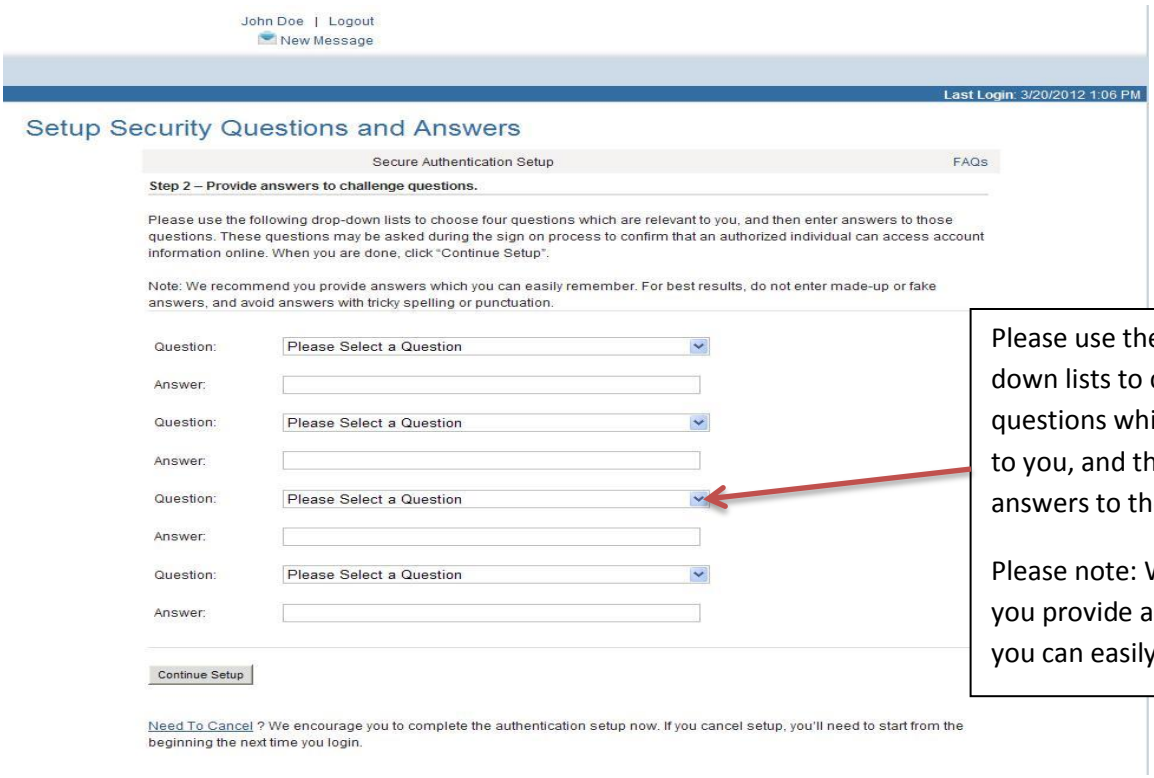
1. An Employee ID which is your Social Security Number with no dashes or an Employee ID that is assigned by your employer.
2. An Employer ID (supplied by HR Simplified in your Welcome Letter) or your Benefit Debit Card Number.

Registration ID is your Employer ID (supplied by HR Simplified in your Welcome Letter) or your Benefit Debit Card Number. You may select the drop down if you have your card number.

If you have not received a Welcome Letter, please call HR Simplified at 888.318.7472 for assistance.

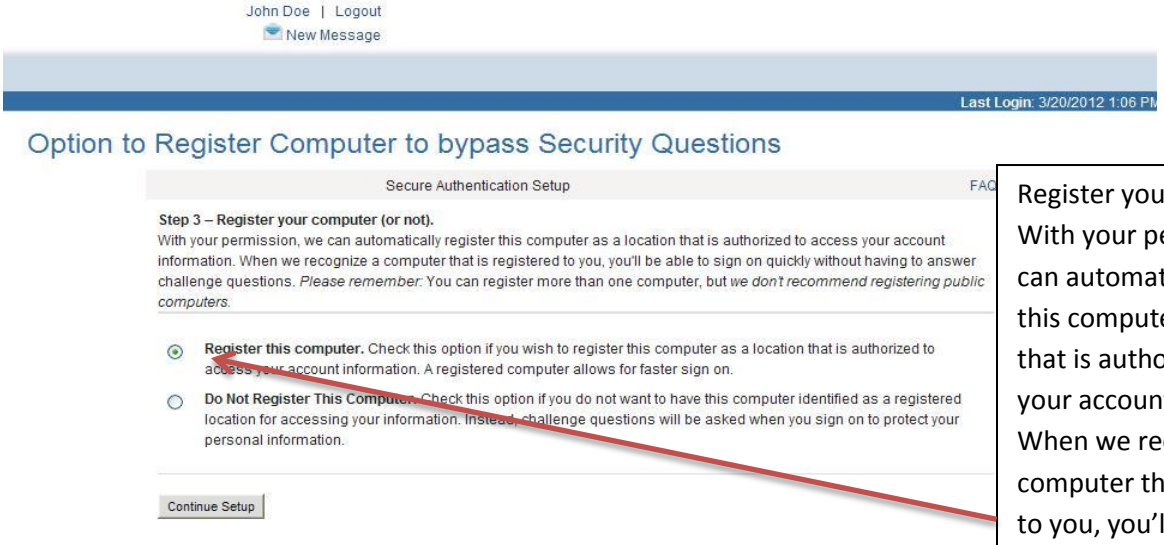

John Doe | Logout
New Message
Last Login: 3/20/2012 1:06 PM
Registration Instructions
HR Simplified Participant Portal Sign In
Secure Authentication Setup
FAQs
To protect your privacy, HR Simplified Participant Portal implements Secure Authentication. Setup is easy and only takes a few minutes. Here 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 – Register your computer (or not). We allow you to register computers you commonly use to access your account information online. This authorization helps us ensure that only recognized locations are accessing your information.
Step 4 – Verify Email Address. We ask you to verify your name and email address.
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
Please click "Begin Setup Now"
Your privacy is our responsibility.
We will maintain the confidentiality of your personal information in accordance with our privacy policy.
VeriSign Trusted


John Doe | Logout
New Message
Last Login: 3/20/2012 1:06 PM
Passphrase and Security Image
Secure Authentication Setup
FAQs
Step 1 – Select a picture and personal phrase
Please select a picture and passphrase. These visual cues are displayed when you sign on and are your assurance that it is safe to enter your access information. You can use the default picture next to your personal phrase, or choose a different picture. Please be sure to enter a personal phrase before clicking "Continue Setup".
Enter a personal phrase:
Spring is here!
Your personal phrase will always appear alongside your picture when you sign on. A phrase can be up to 40 characters long.
Continue Setup
Please select a personal phrase and a picture.
You may select a different picture by clicking on the picture you wish to use.
You can browse through additional pictures by category. Simply select the category and click "Browse".
Category:
Select a Category
Browse
Need To Cancel ? We encourage you to complete the authentication setup now. If you cancel setup, you'll need to start from the beginning the next time you login.



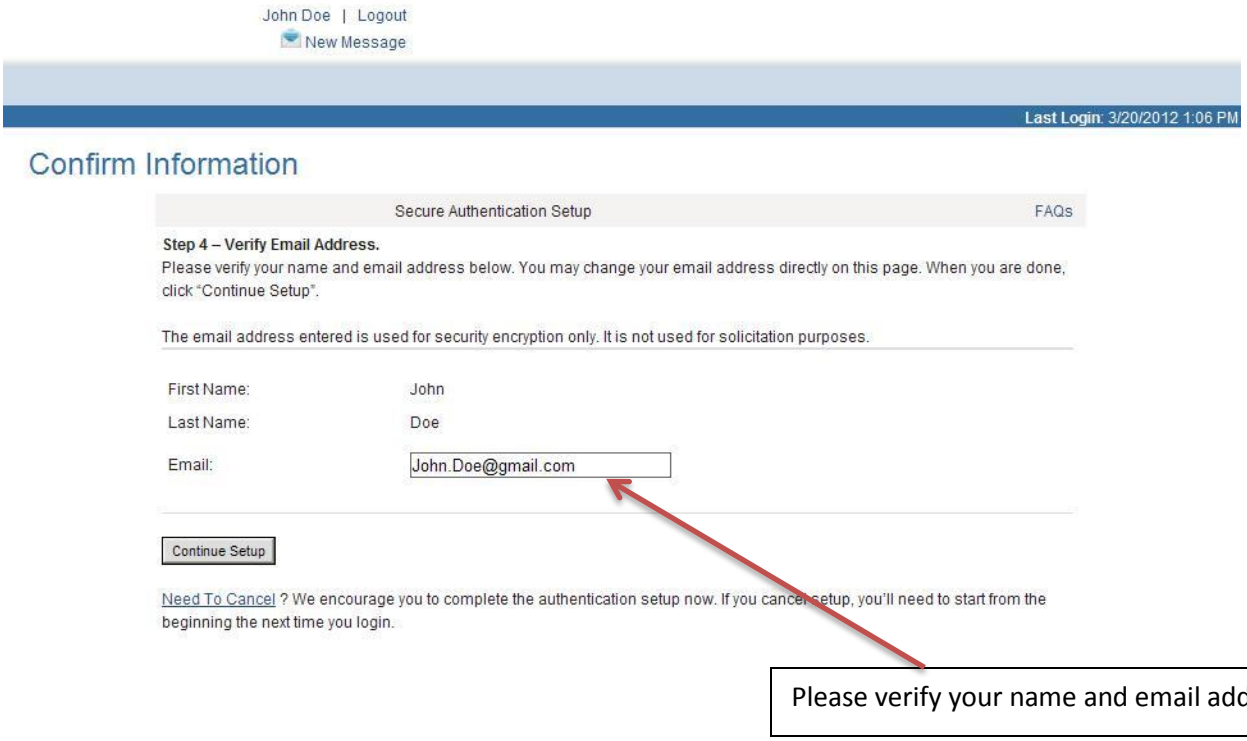
Please use the following drop-down lists to choose four questions which are relevant to you, and then enter answers to those questions.

Please note: We recommend you provide answers which you can easily remember.



Register your computer: With your permission, we can automatically register this computer as a location that is authorized to access your account information. When we recognize a computer that is registered to you, you'll be able to sign on quickly without having to answer your security questions.

Please remember: You can register more than one computer, but we don't recommend registering public computers.


John Doe | Logout
New Message
Last Login: 3/20/2012 1:06 PM
Confirm Information
Secure Authentication Setup
FAQs
Step 4 – Verify Email Address.
Please verify your name and email address below. You may change your email address directly on this page. When you are done, click "Continue Setup".
The email address entered is used for security encryption only. It is not used for solicitation purposes.
First Name:
John
Last Name:
Doe
Email:
John.Doe@gmail.com
Continue Setup
Need To Cancel ? We encourage you to complete the authentication setup now. If you cancel setup, you'll need to start from the beginning the next time you login.
Please verify your name and email address.

John Doe | Logout
New Message

Last Login: 3/20/2012 1:06 PM

Setup Confirmation

Set Up Secure Authentication FAQs

Your setup information has not yet been submitted. Please verify your information below and enter your password before clicking "Submit Setup Information". If you need to make a change before submitting, click the appropriate "Change Information" link.

Picture and Personal Phrase Change information

Spring is here!

Questions and Answers Change information

In what year were you married? (YYYY)	2009
In what month did you get married?(spell out)	March
In what city were you born? (city name only)	Los Angeles
In what year did you graduate from high school? (YYYY)	1998

Computer Registration Change information

Register this computer.

Personal Information Change information

First Name:	John
Last Name:	Doe
Email Address:	John.Doe@gmail.com

Password

Your password is a key part of Secure Authentication and must be submitted with your setup request. You may reuse your existing password or choose a new password. The password should be 8-16 characters long and include at least one alpha and numeric characters.

Password:

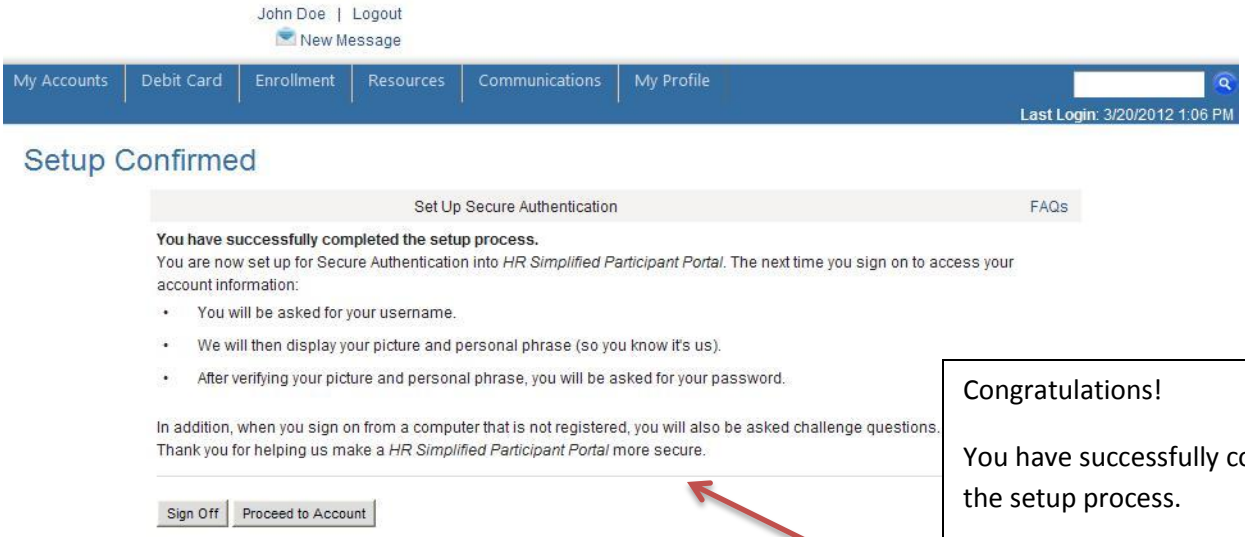
Confirm Password:

Submit Setup Information

Need To Cancel ? We encourage you to complete the authentication setup now. If you cancel setup, you'll need to start from the beginning the next time you login.

Your setup information has not yet been submitted.

Please verify your information below and enter your password before clicking "Submit Setup Information." If you need to make a change before submitting, click the appropriate "Change Information" link.

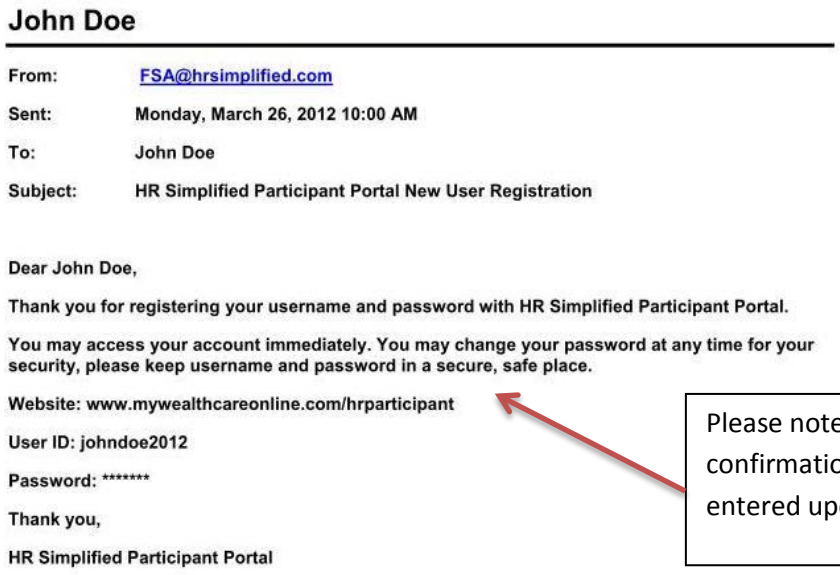


Congratulations!

You have successfully completed the setup process.

You are now set up for Secure Authentication into HR Simplified Participant/WealthCare Participant Portal.

HR Simplified Participant/WealthCare Portal New User Registration



John Doe

From: FSA@hrsimplified.com

Sent: Monday, March 26, 2012 10:00 AM

To: John Doe

Subject: HR Simplified Participant Portal New User Registration

Dear John Doe,

Thank you for registering your username and password with HR Simplified Participant Portal.

You may access your account immediately. You may change your password at any time for your security, please keep username and password in a secure, safe place.

Website: www.mywealthcareonline.com/hrparticipant

User ID: johndoe2012

Password: *****

Thank you,

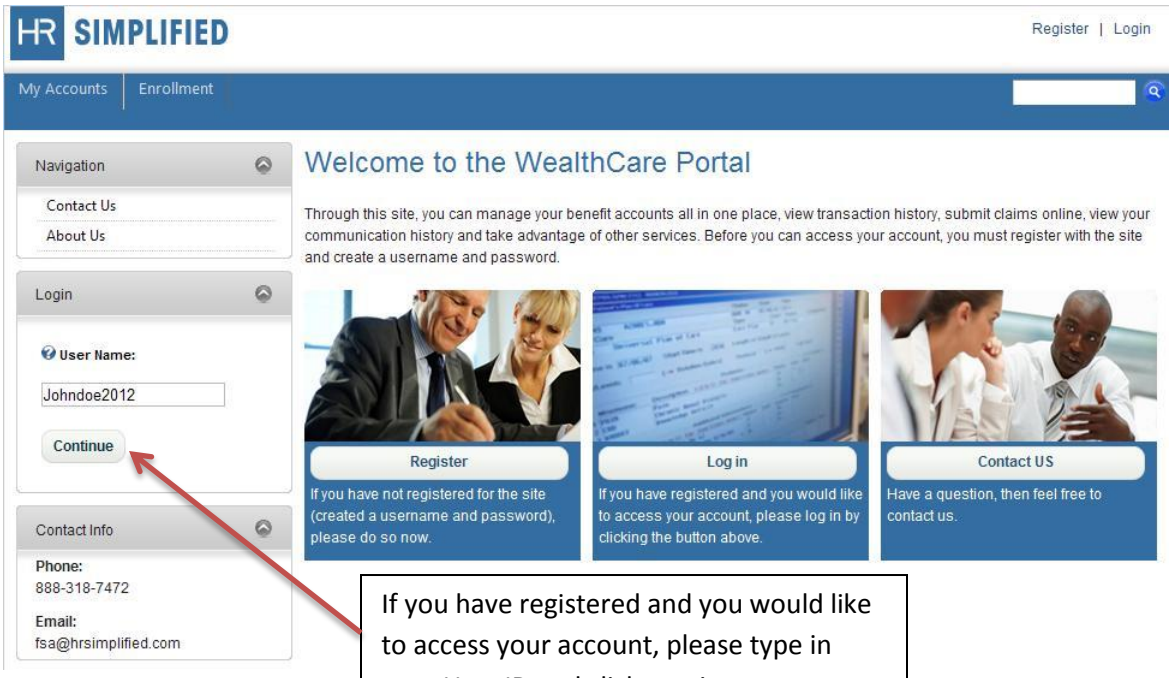
HR Simplified Participant Portal

Please note you will receive an email confirmation to the email address entered upon Registration.

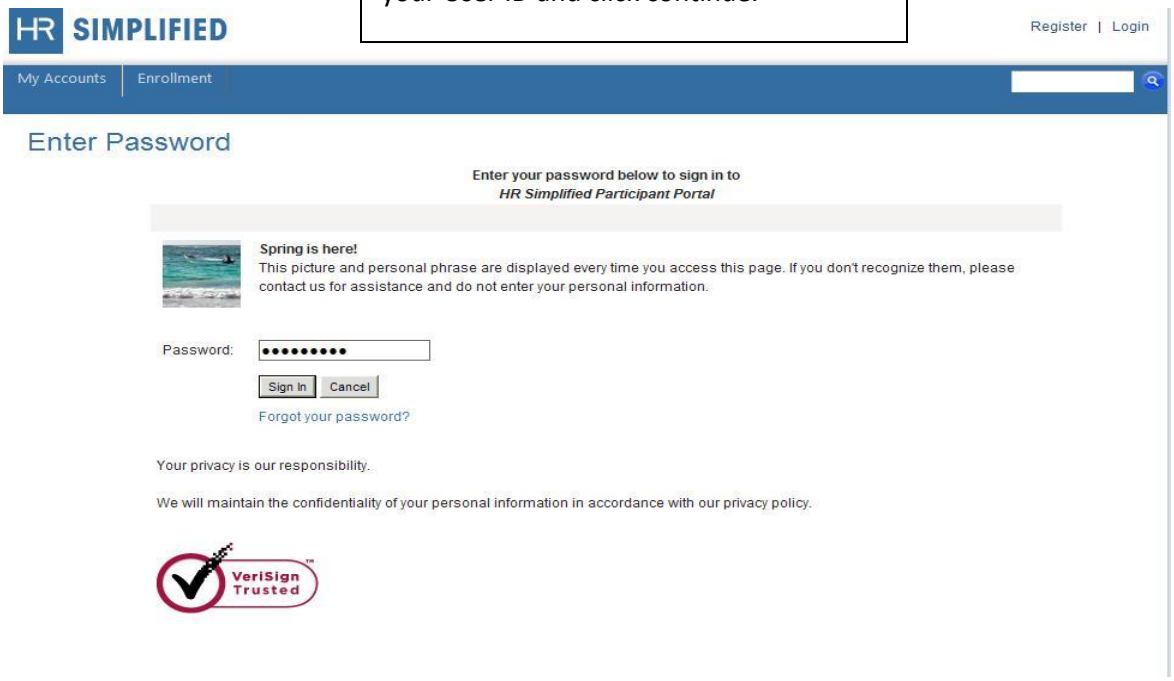
Account already created with HR Simplified

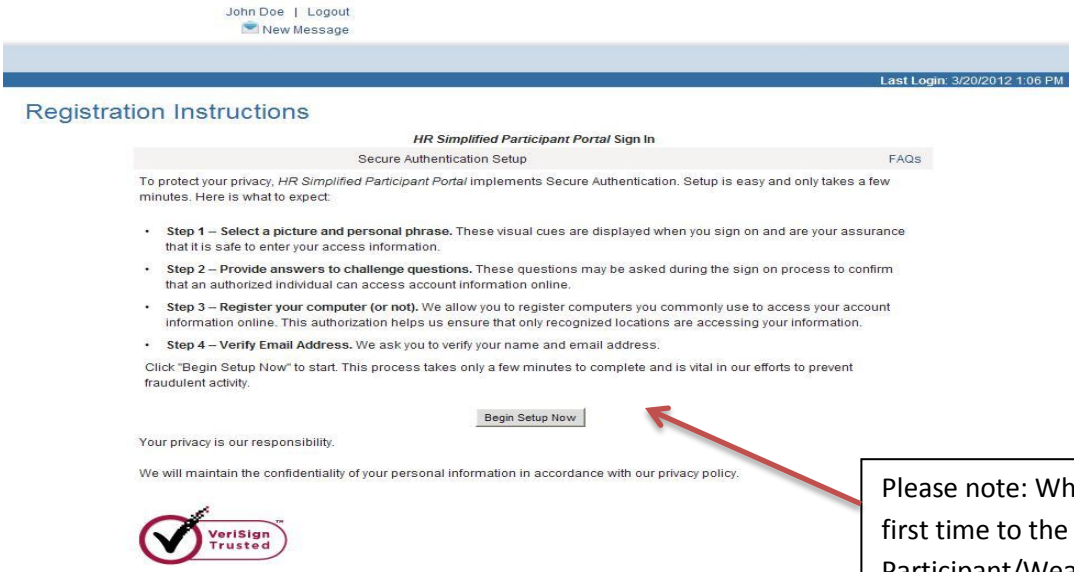
If you already have a user name and password created you will need to complete a few necessary steps.

See below:

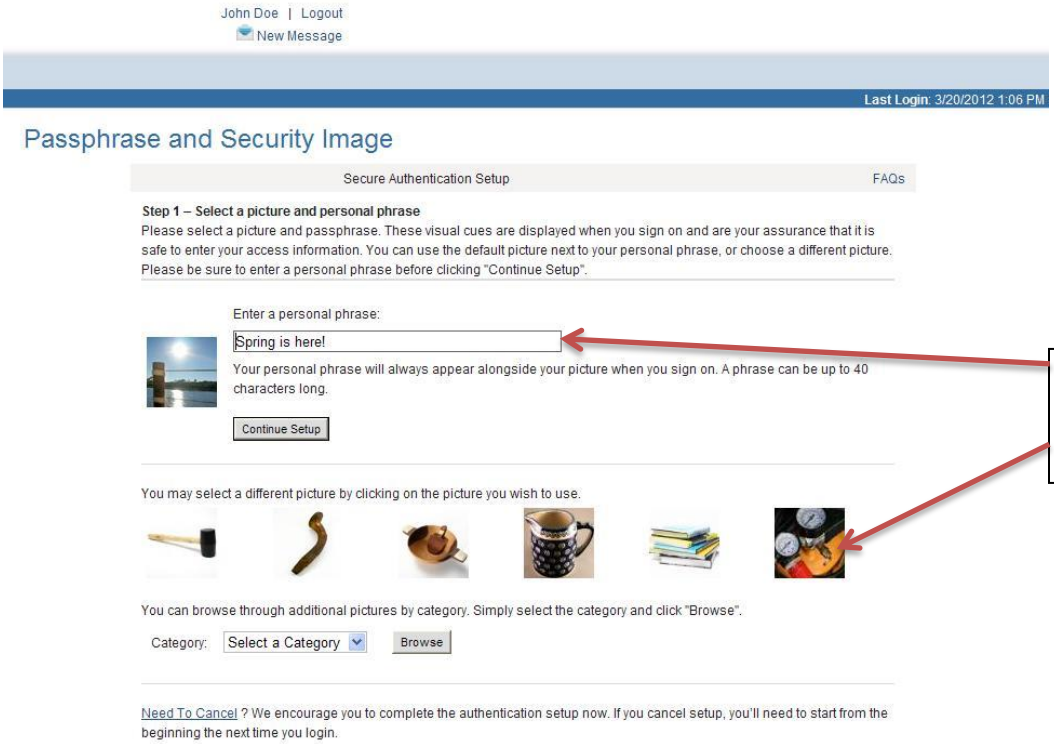


If you have registered and you would like to access your account, please type in your User ID and click continue.

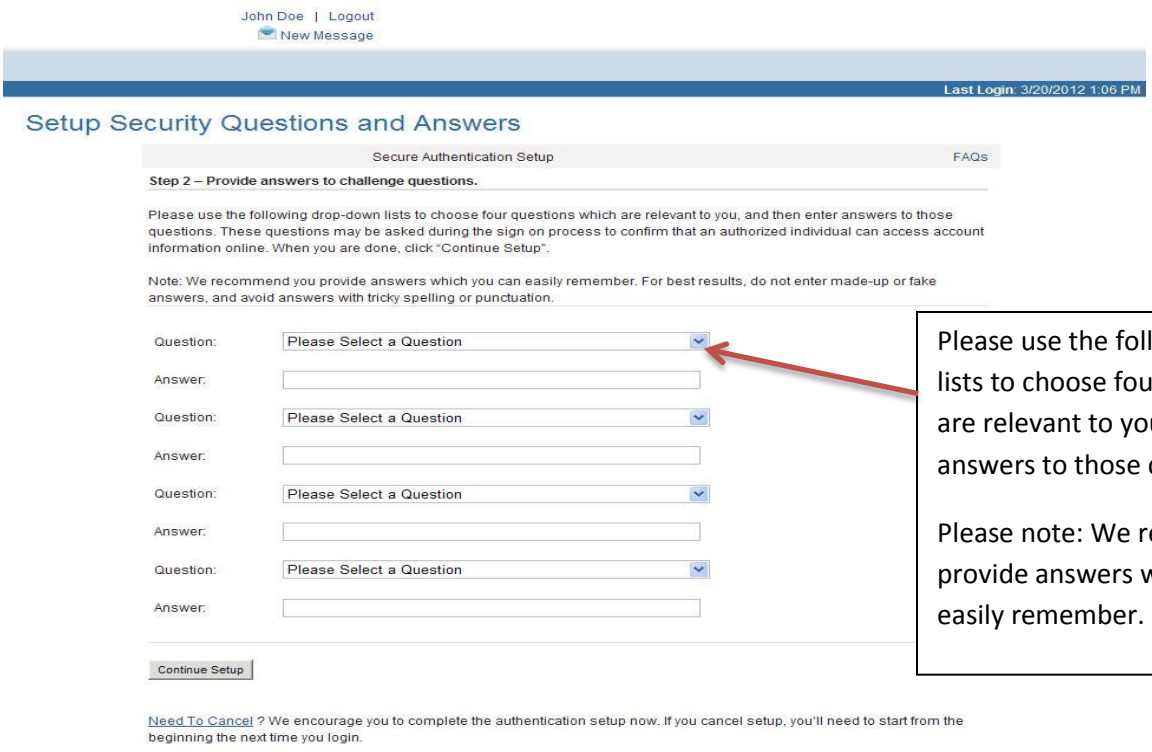




Please note: When signing on for the first time to the Participant/WealthCare Participant Portal, you will need to complete a few necessary steps before logging into your account.

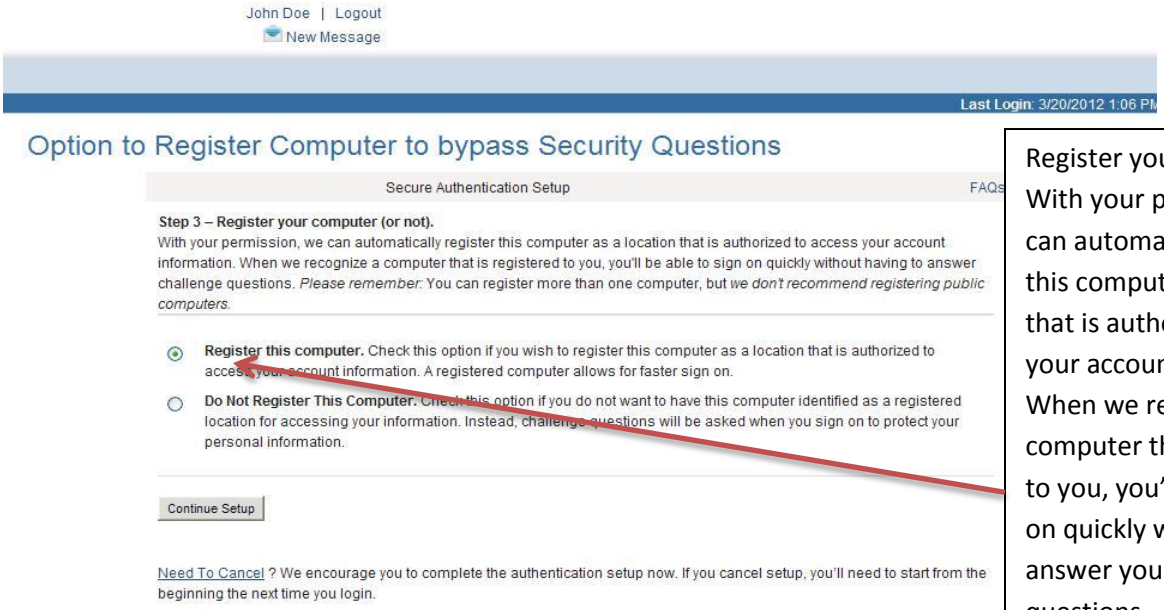


Please select a personal phrase and a picture.



Please use the following drop-down lists to choose four questions which are relevant to you, and then enter answers to those questions.

Please note: We recommend you provide answers which you can easily remember.



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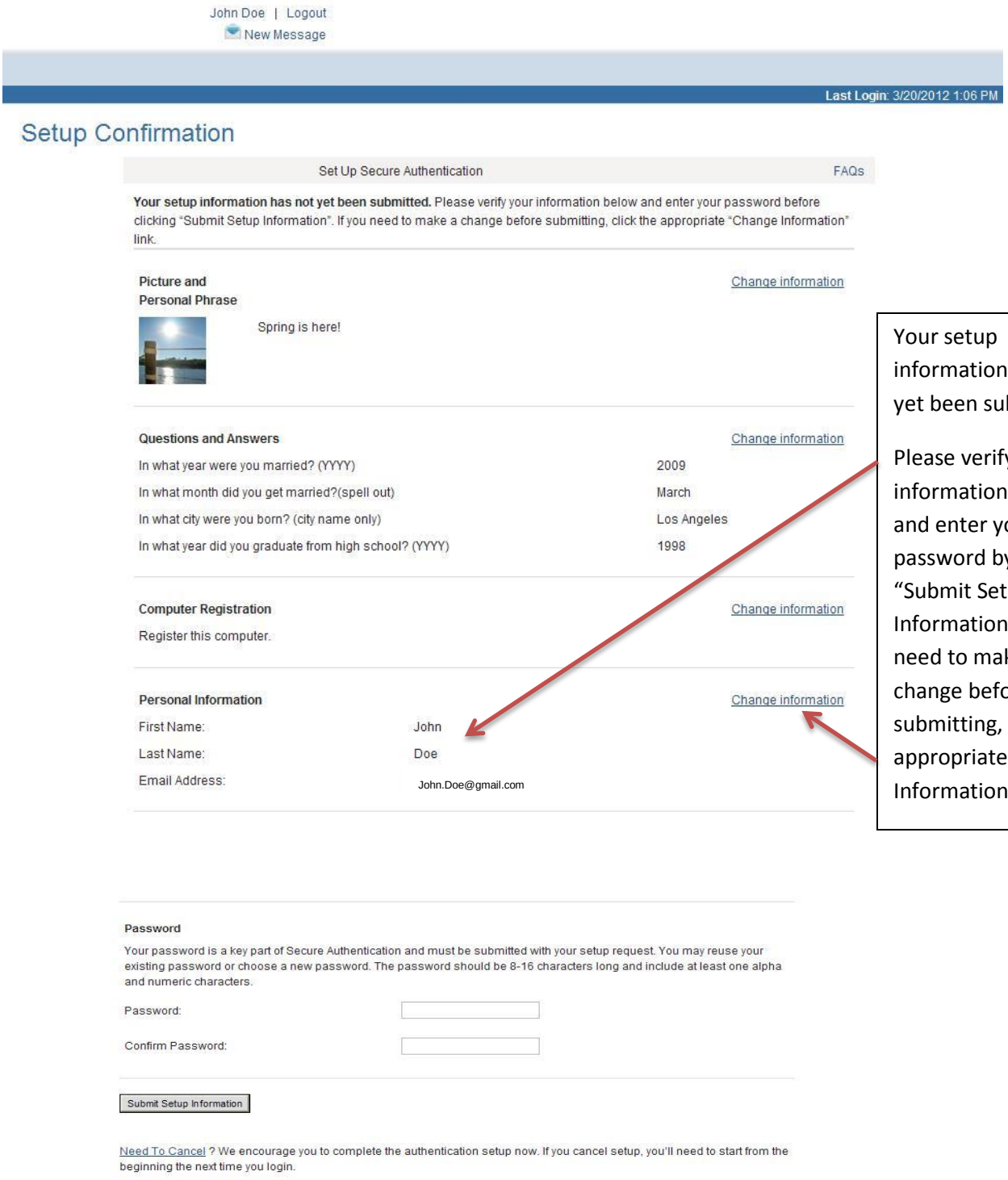
Please remember: You can register more than one computer, but we don't recommend registering public computers.



Your setup information has not yet been submitted.

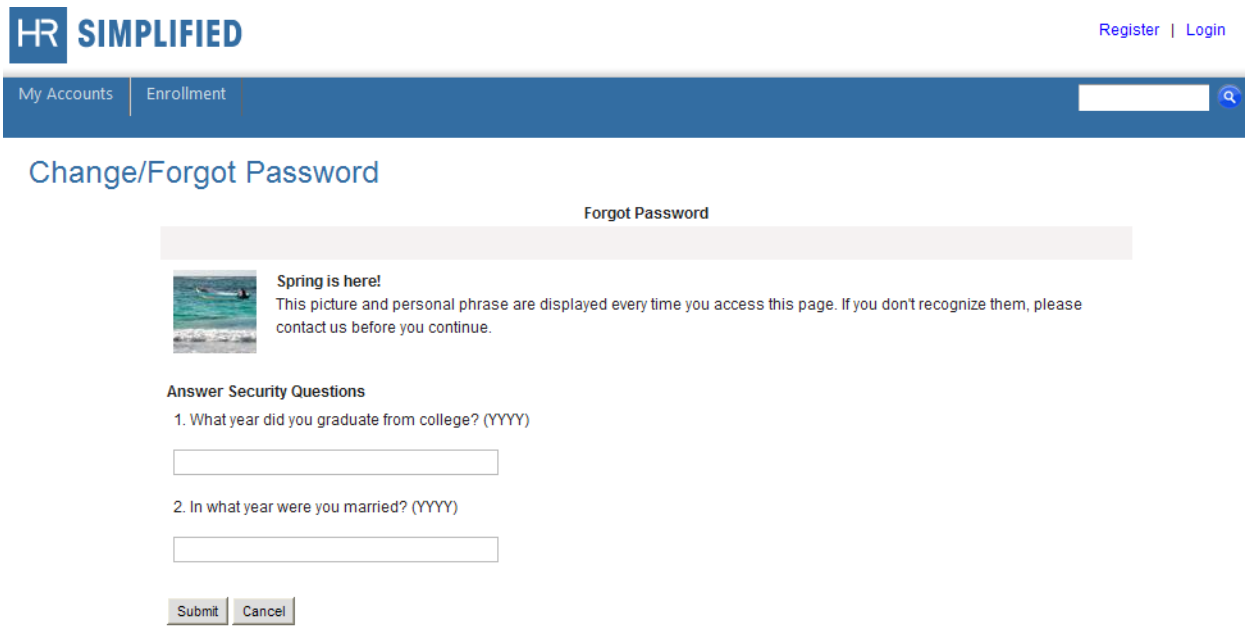
Please verify your information below and enter your password by clicking "Submit Setup Information." If you need to make a change before submitting, click the appropriate, "Change Information" link.

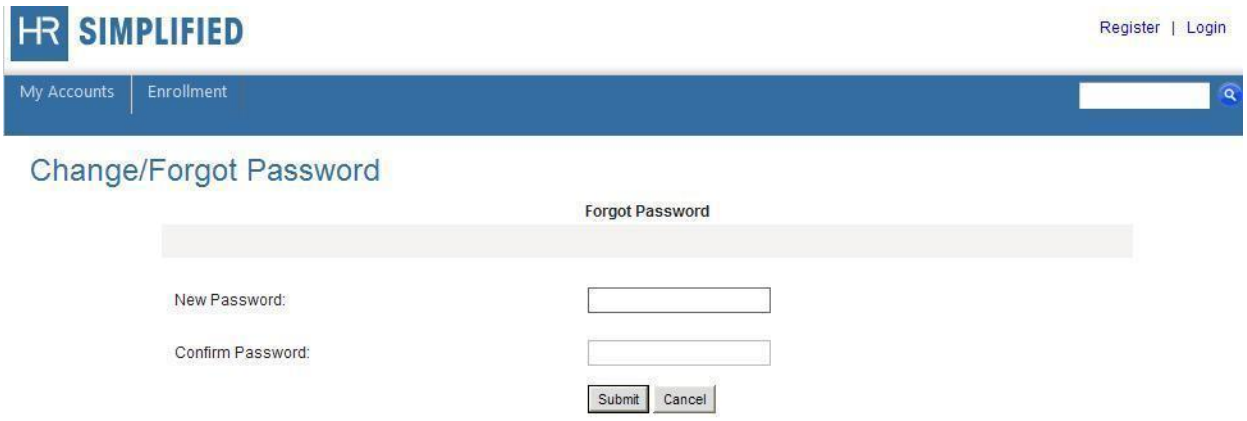
Change/Forgot Password

If you have forgotten your password, please click on "Forgot your password"

You will have three attempts to try to remember your password on the fourth try; you will be locked out of your account and will have to call HR Simplified for a reset. Once the account has been reset, it requires you to go through the account creation again.

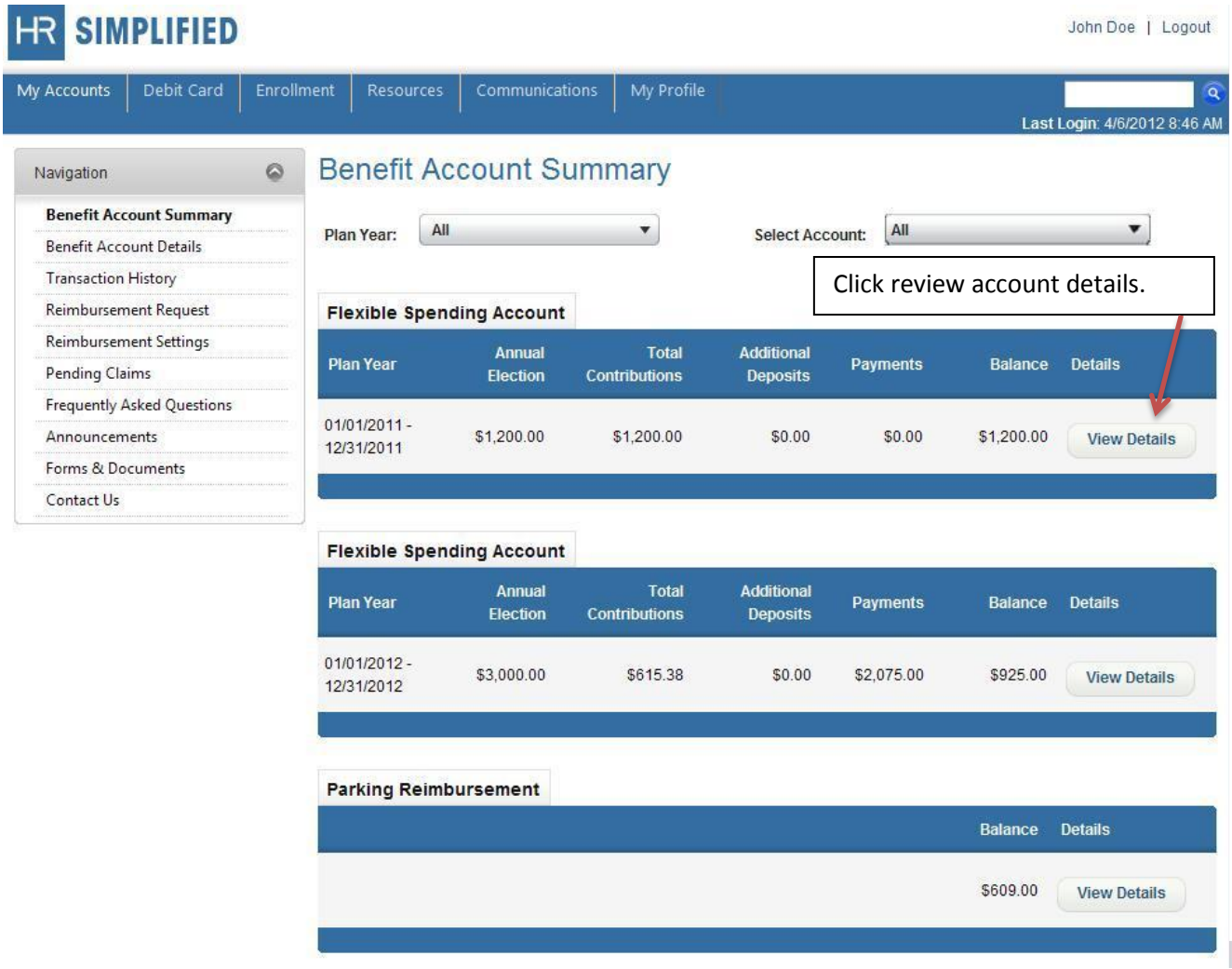
After clicking on the "Forgot your password," you will be asked two of your four security questions. Please answer, click on submit, and you will then be prompted to reset your password.





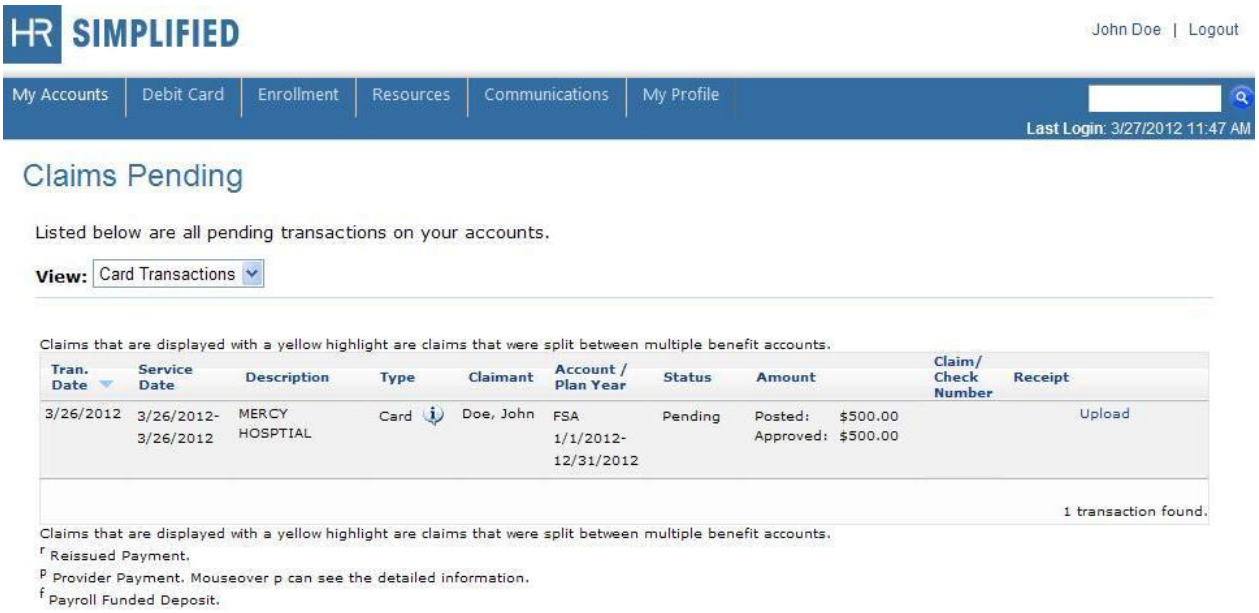
Balance Summary

The Balance Summary page displays a list of all the accounts you have enrolled in along with summary information for each account.



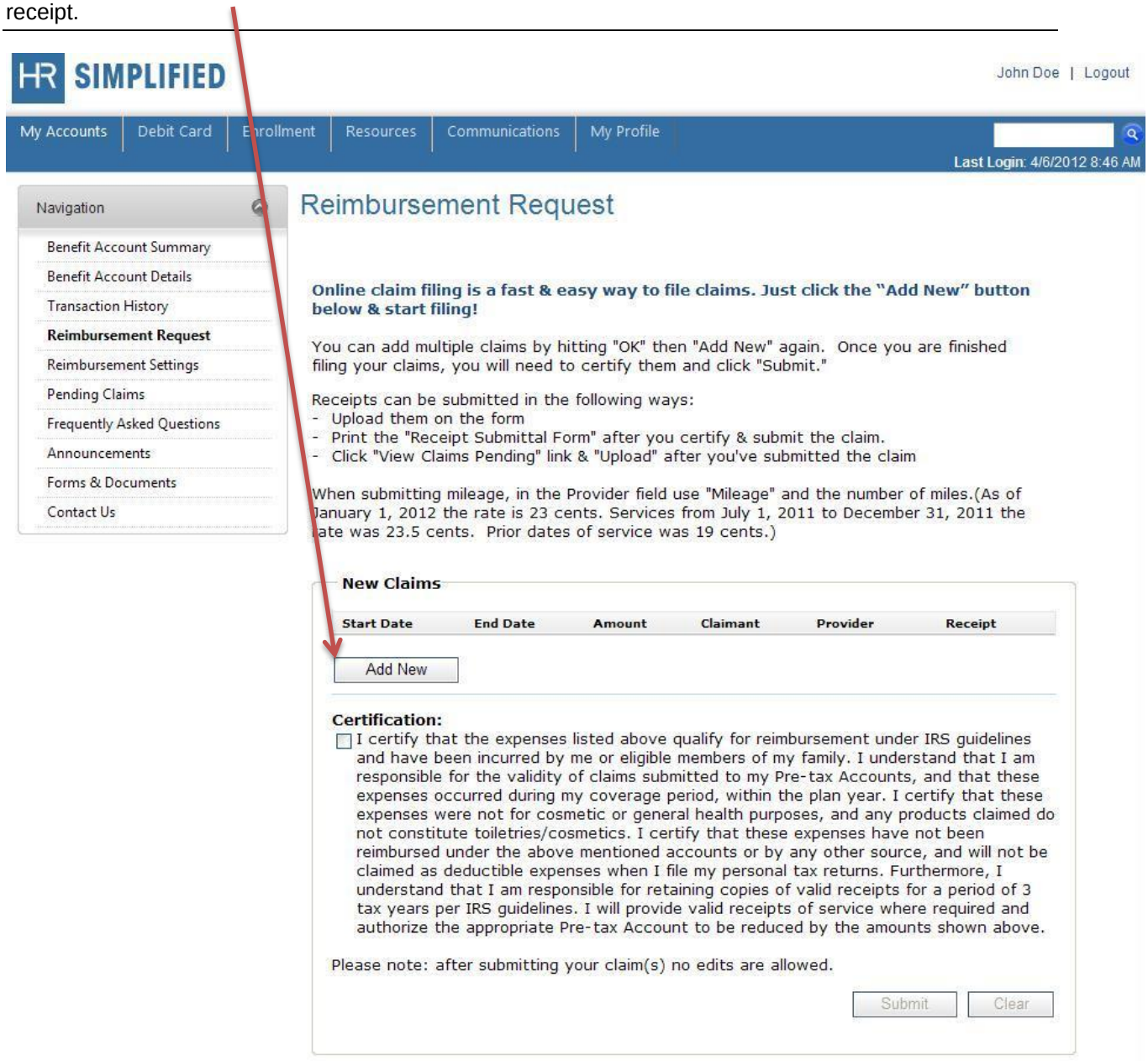
View Claims Pending

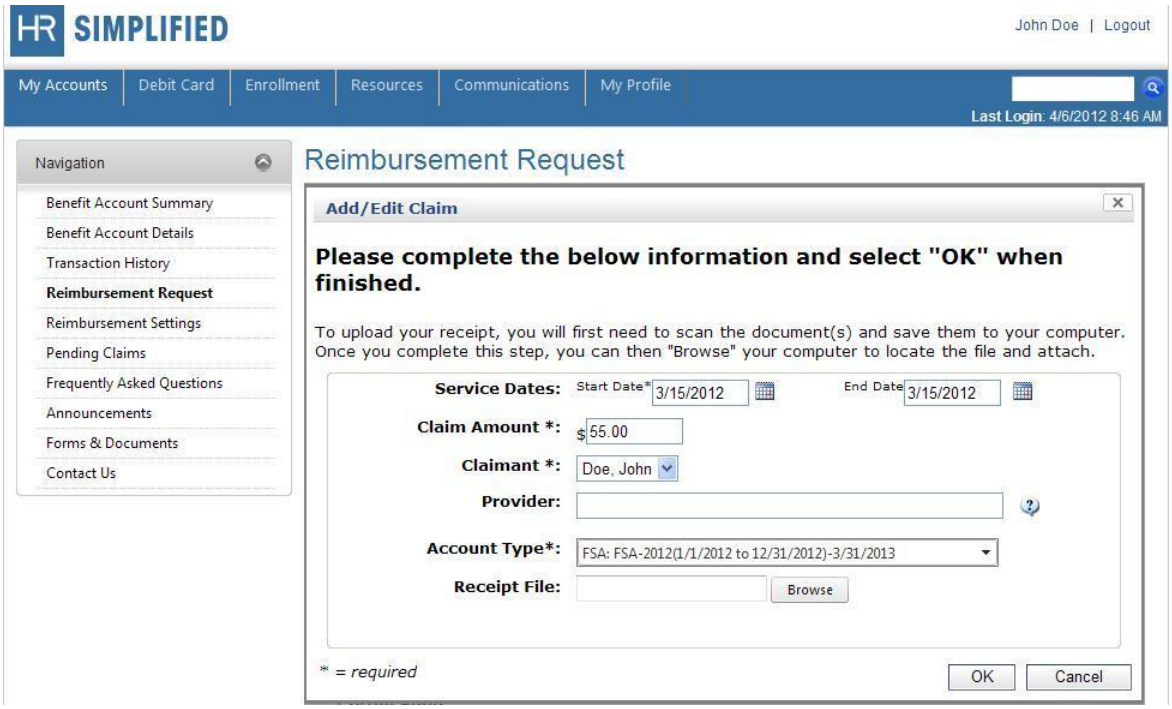
The View Claims Pending page will display card transactions that require you to submit an itemized statement or Explanation of Benefits.



Request Reimbursement

The Request Reimbursement page allows you to file claims online. You can add multiple claims by clicking “OK” then “Add New” again. This form will also allow you to upload a scanned image of your receipt.





1. **Enter the service date(s) of your expense.**
2. **Enter the claim amount.**
3. **Enter the provider of the service.**
4. **Enter the claimant (person who incurred the expense).**
5. **Select the account to be reimbursed from.**
6. **If you have a scanned image of your receipt, you may upload the receipt and attach it to this claim. Just click the "Browse" button and locate your scanned image on your computer.**
7. **Add any notes about the claim.**
8. **Click "OK".**

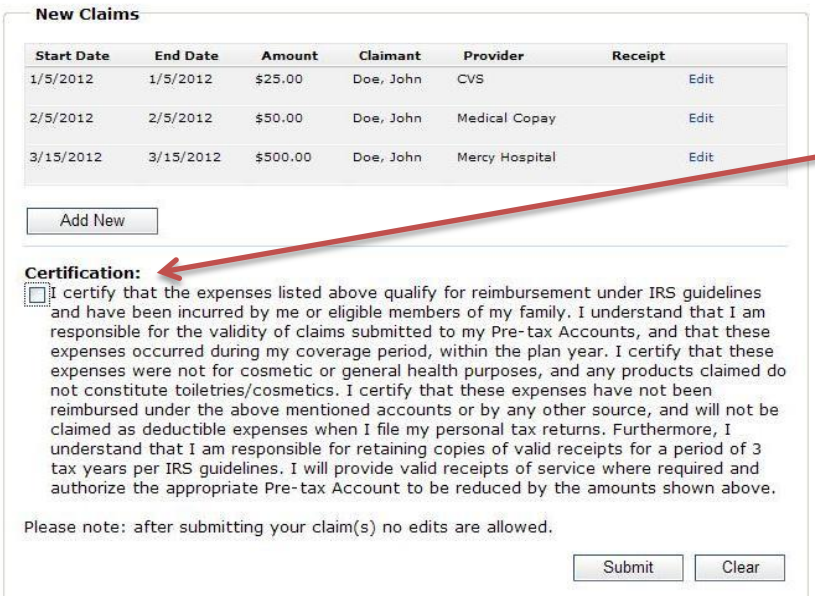
Reimbursement Request

Online claim filing is a fast & easy way to file claims. Just click the "Add New" button below & start filing!

You can add multiple claims by hitting "OK" then "Add New" again. Once you are finished filing your claims, you will need to certify them and click "Submit."

Receipts can be submitted in the following ways:
- Upload them on the form
- Print the "Receipt Submittal Form" after you certify & submit the claim.
- Click "View Claims Pending" link & "Upload" after you've submitted the claim

When submitting mileage, in the Provider field use "Mileage" and the number of miles.(As of January 1, 2012 the rate is 23 cents. Services from July 1, 2011 to December 31, 2011 the rate was 23.5 cents. Prior dates of service was 19 cents.)

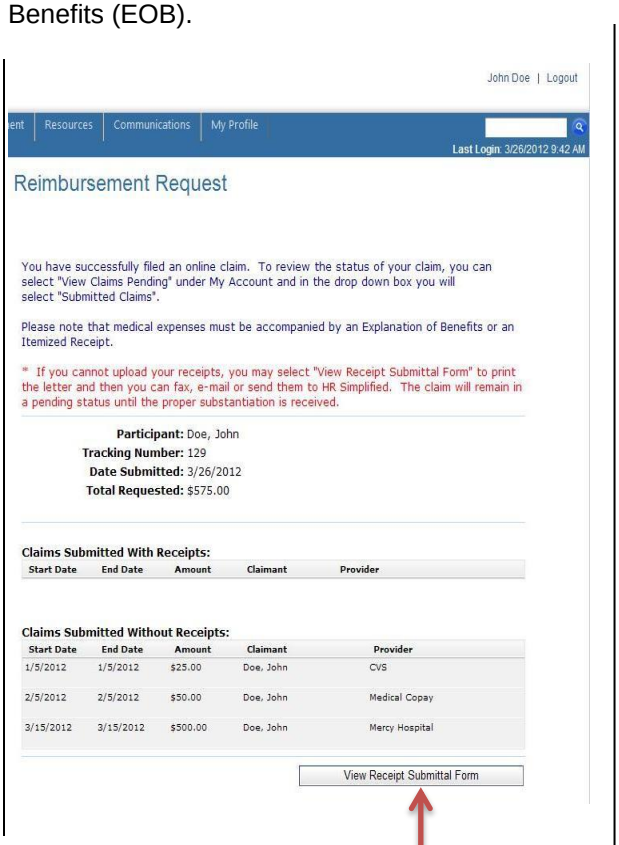


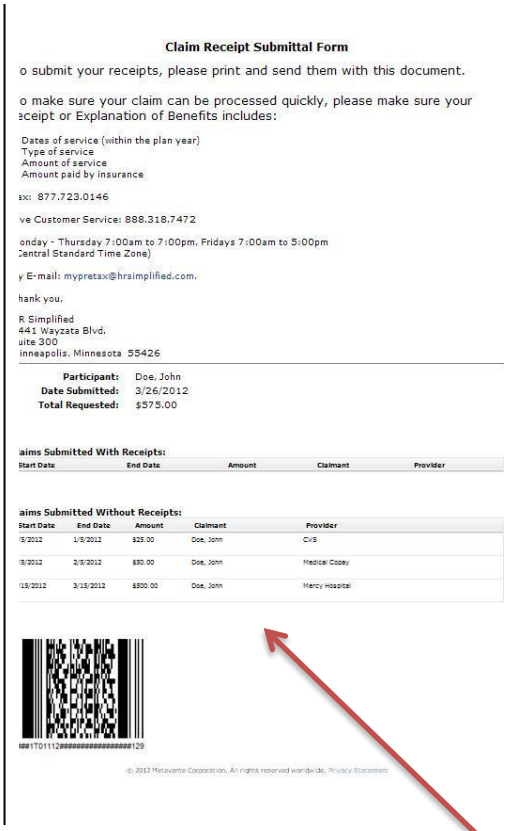
Once you are finished filing your claims, you will need to "Certify" them and click "Submit". If you don't "Certify" your claims, they will not be sent to HR Simplified.

1. **Click the Certification box.**
2. **Click the "Submit" button.**
3. **You're all done!**

****If you are unable to upload a scanned image of your receipt, the system will automatically prepare a fax cover page for you to use when faxing in your receipt to HR Simplified.****

Please Note: Please include the claim receipt submittal form with the necessary receipt or Explanation of Benefits (EOB).



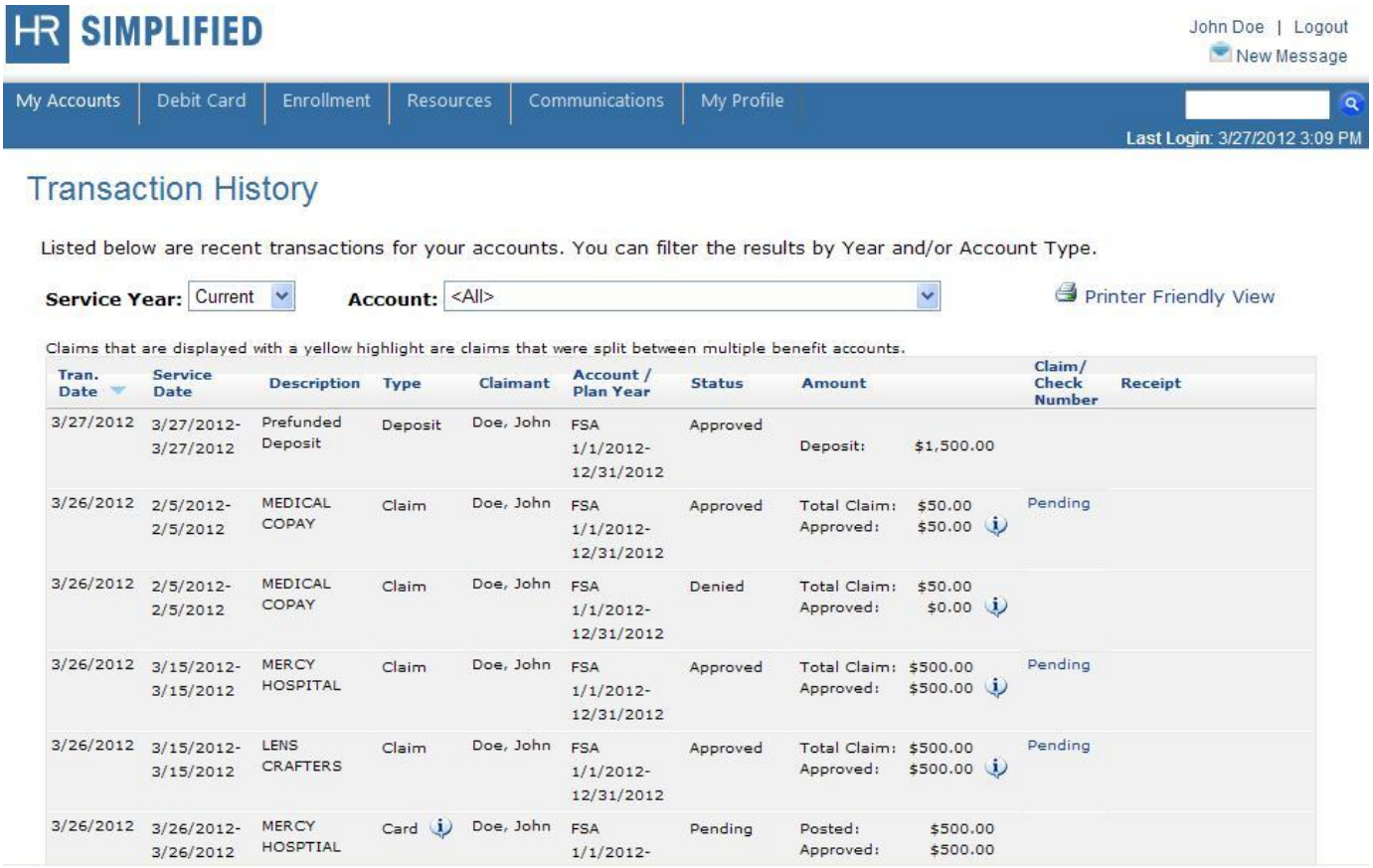


Click the "View Receipt Submittal Form."

Please note: If you are unable to upload your receipts, print this "Claim Receipt Submittal Form" and fax or mail your receipts or Explanation of Benefits to HR Simplified.

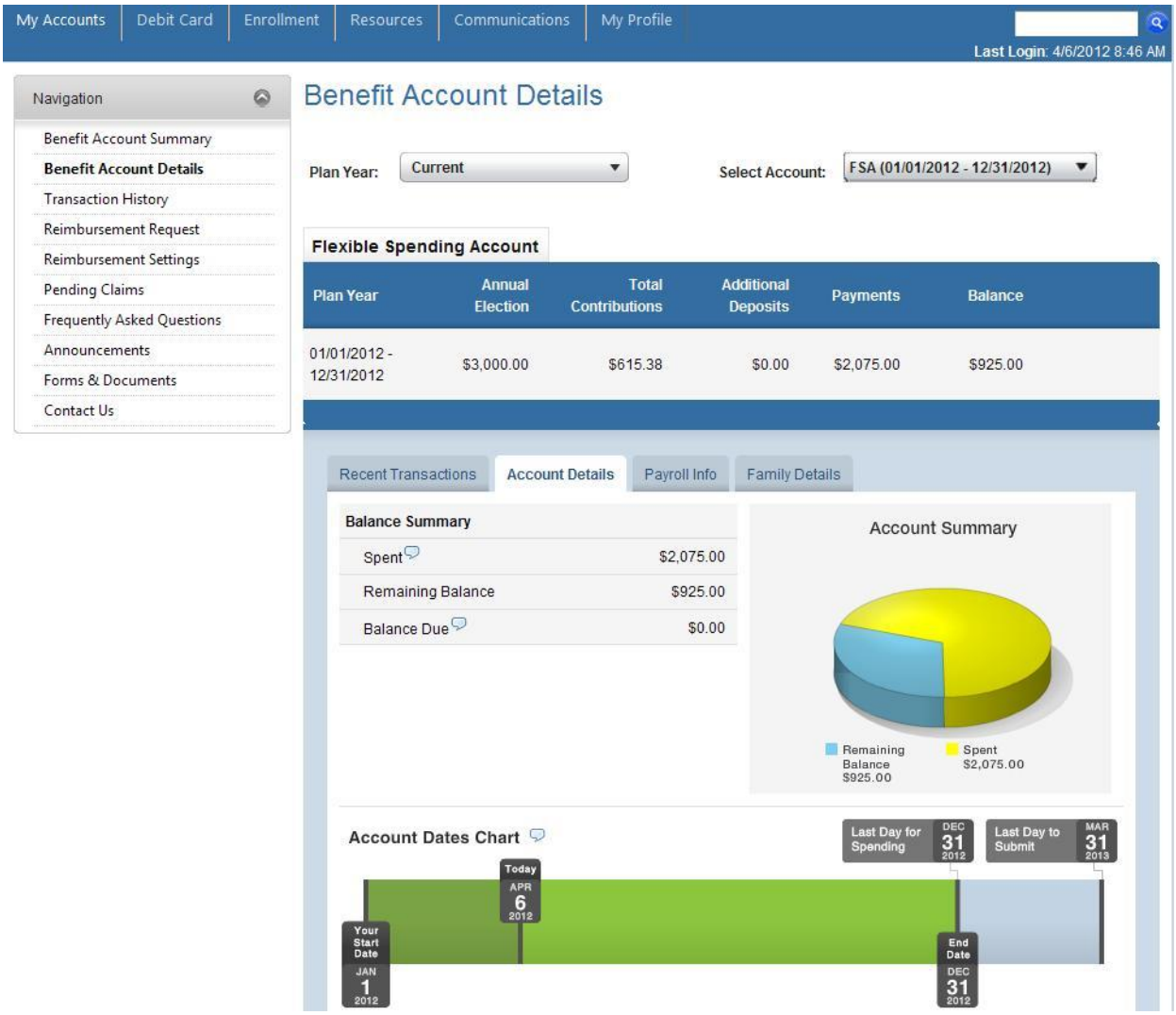
Transaction History

The Transactions tab allows you to manage card transactions and manual claims, set up manual claim reimbursement, and process manual claim reimbursements.



Benefit Account Details

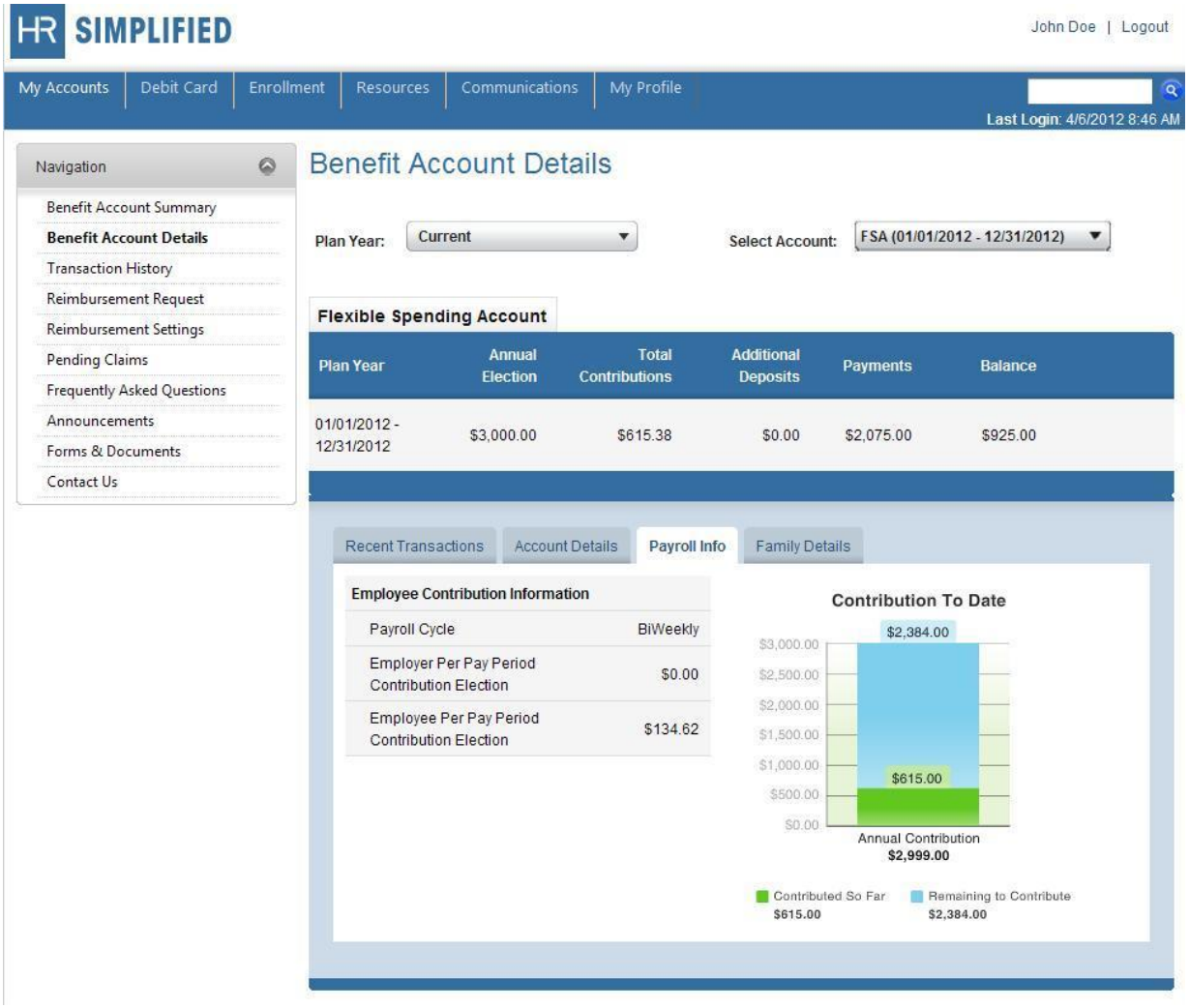
Displays Balance Summary(s), Account Summary(s), Chart and Plan Date Graphic.



Account Dates Chart: Provides guidance on what dates of service are eligible for reimbursement for this account.

- **Start Date:** The earliest date of service for which you may be reimbursed for eligible services.
- **End Date**: This date is the end date for this plan.
- **Last Day for Spending:** Latest date of service for which you may be reimbursed for eligible services.
- **Last Day to Submit Claims:** You must submit claims by this date to be considered for reimbursement. The claim date of service must be within the green area of this chart.

Payroll Info

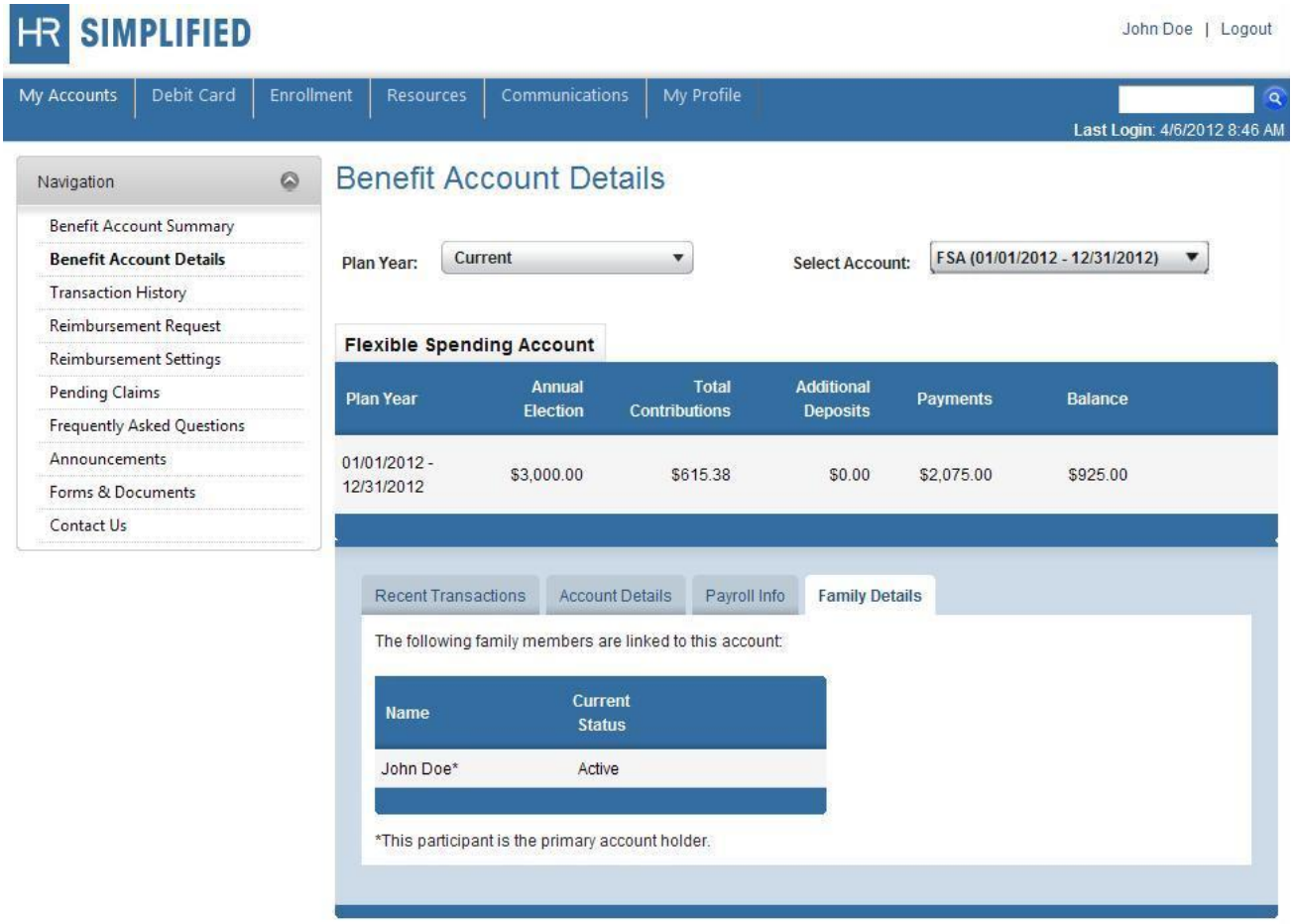


Payroll Cycle: Displays the calendar type associated with cycle (weekly, bi-weekly, monthly, etc.)

- **Employer Per Pay Period Contributions:** Displays the employer contributions per each pay period.
- **Employee Per Pay Period Contributions:** Displays the employee contribution per each pay period.
- **Contribution Chart:** Displays how much has been contributed to date and the amount remaining to contribute.

Family Details

Provides details for individual amount balances/deductibles or the family members linked to the account.

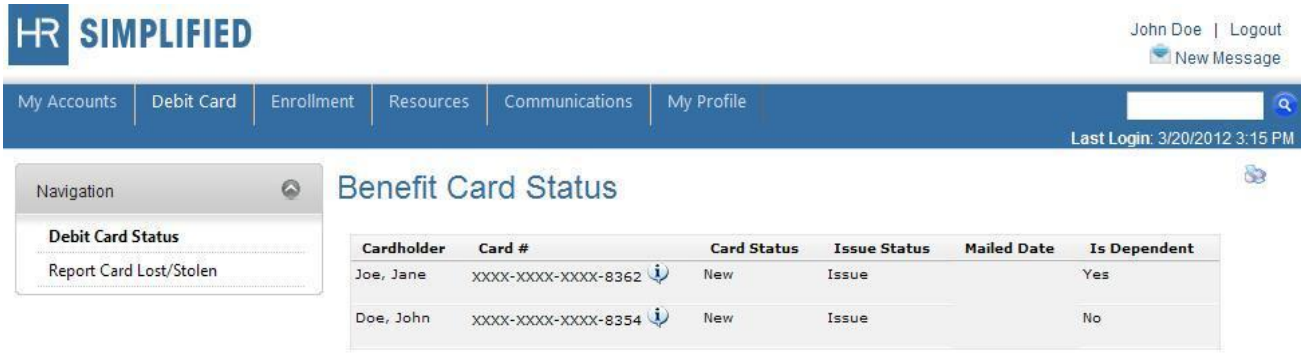


Name: Participant or Dependents name.

Current Status: Displays the status per dependent. Active, Inactive (Employee/Dependent Account Status: Temporary Inactive, Terminated.)

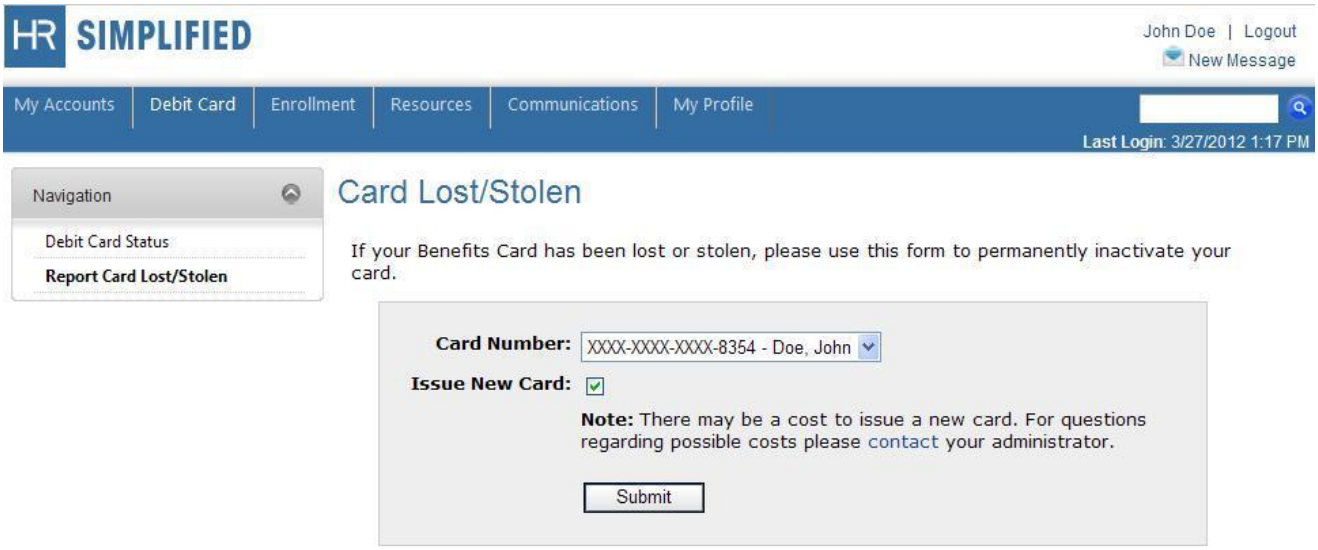
Card Status

The Card Status page will display a list of cards that are issued to you and any dependents.



Report Lost/Stolen Card

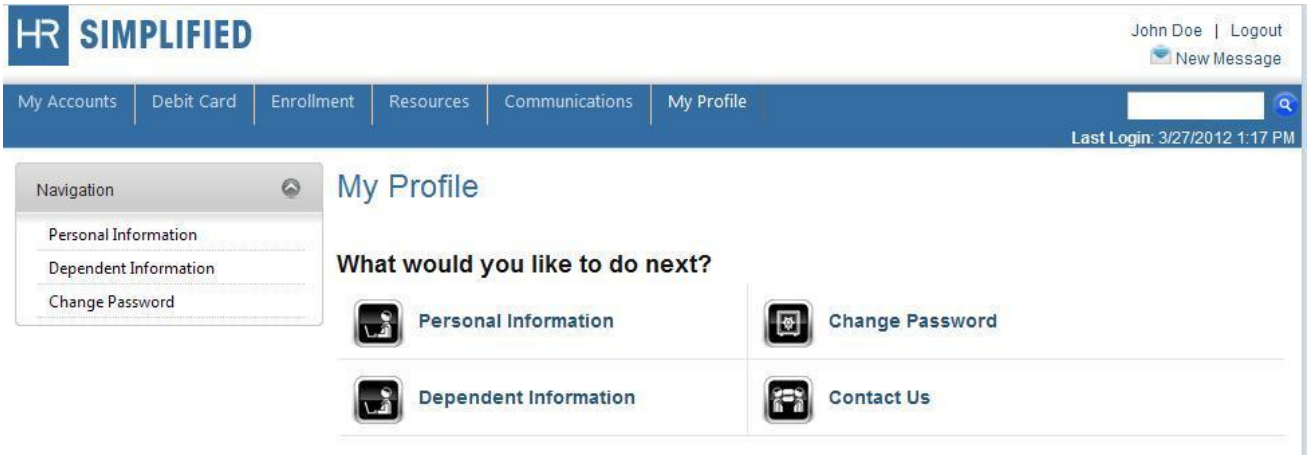
The Report Lost/Stolen Card page will allow you to report your card lost or stolen. This will deactivate the card. You will also have the option to request a new card at this time.

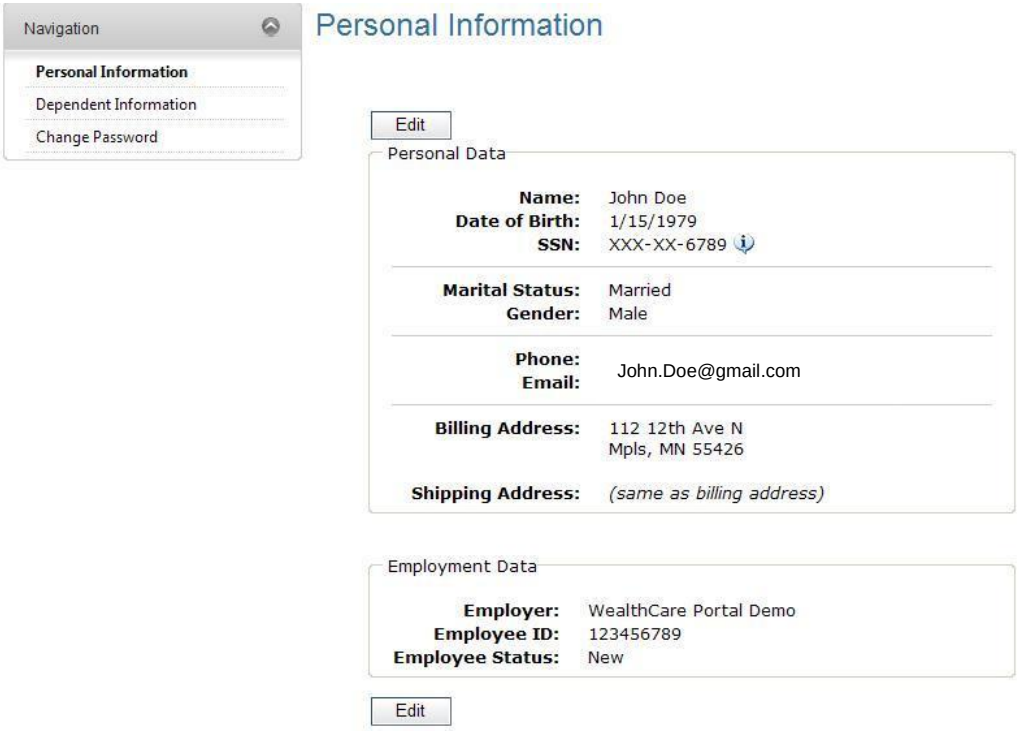


Personal Information

The Personal Information page will allow you to view your demographic information.

** Please keep in mind that your employer may not allow changes to be done at the employee level. In these cases, please contact your local Human Resource Department to update this information. **

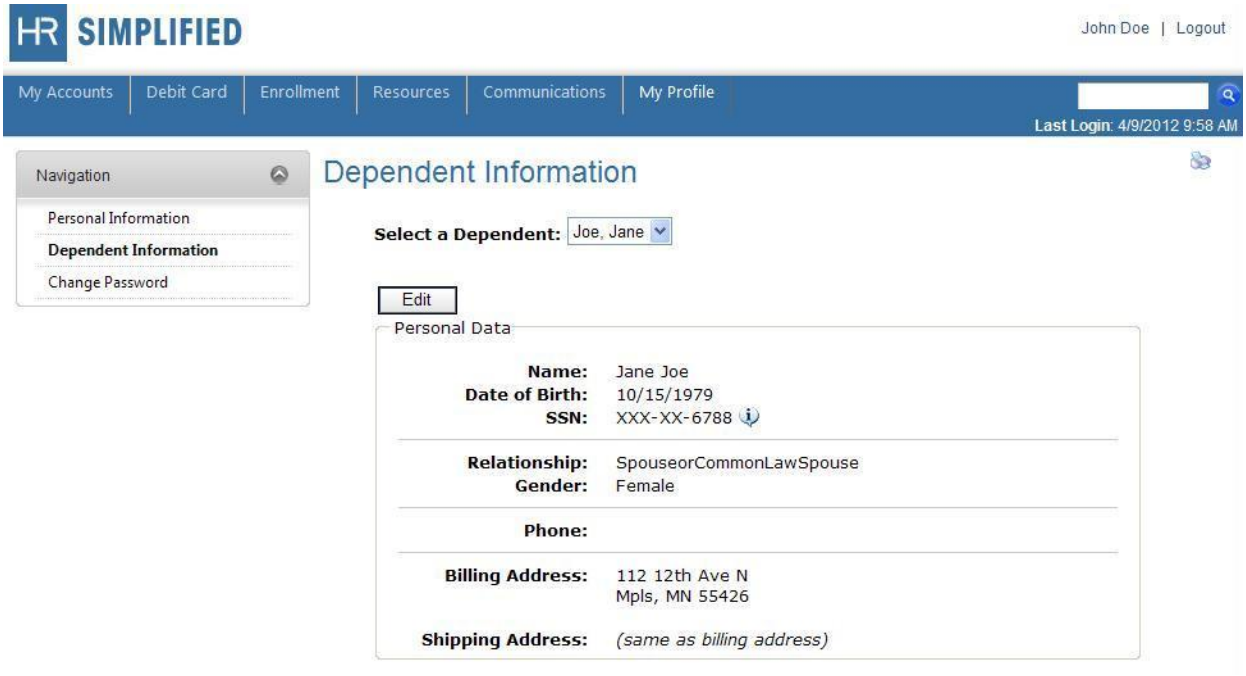




Dependent Information

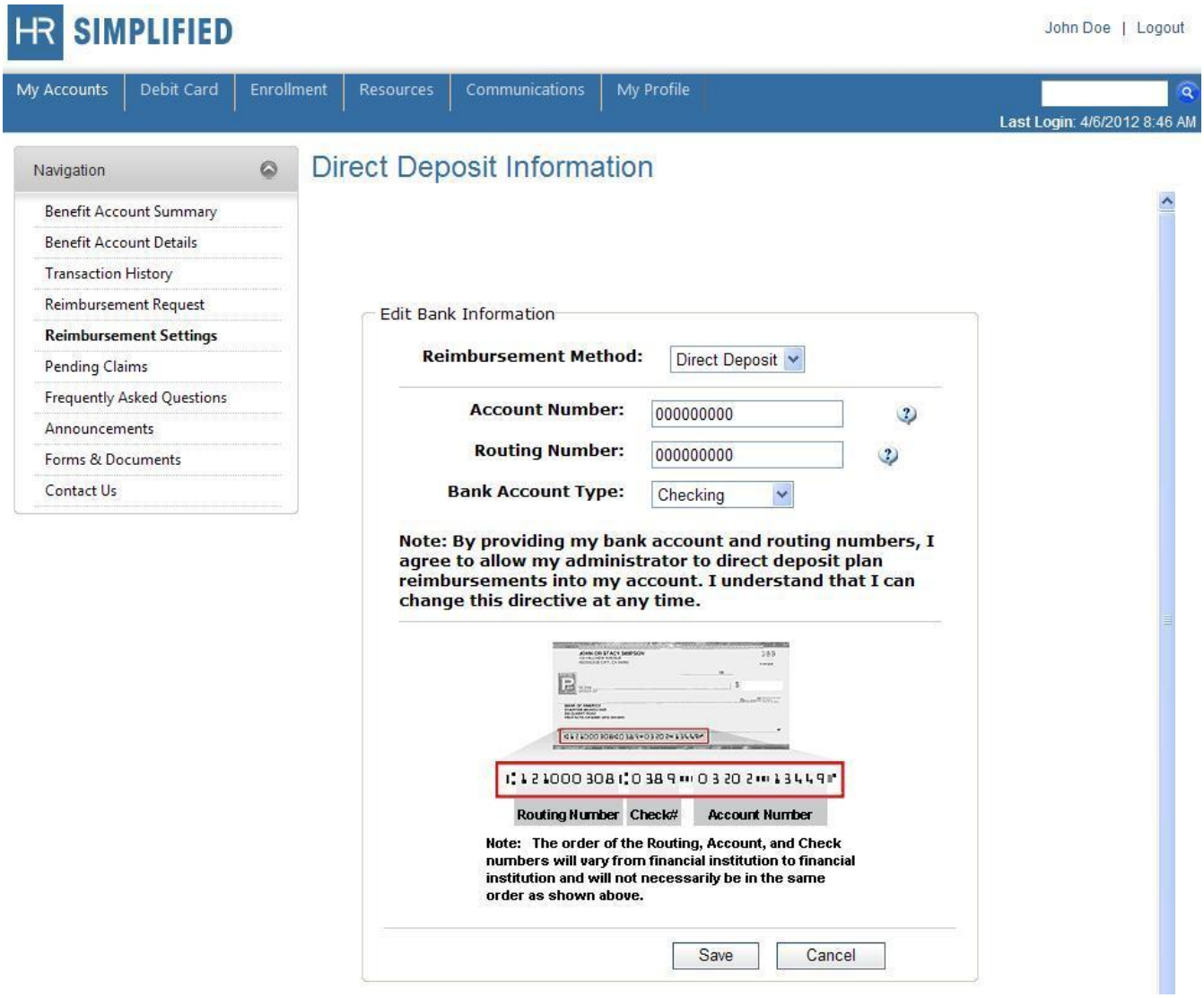
Dependent information is not required for your Flexible Spending Account. However, you may see your dependent's name because we may have issued a benefit card to them at your request.

If you would like to provide your dependent's information - Please send in your written request to HR Simplified at FSA@HRSimplified.com or fax to 1-877-723-0146.



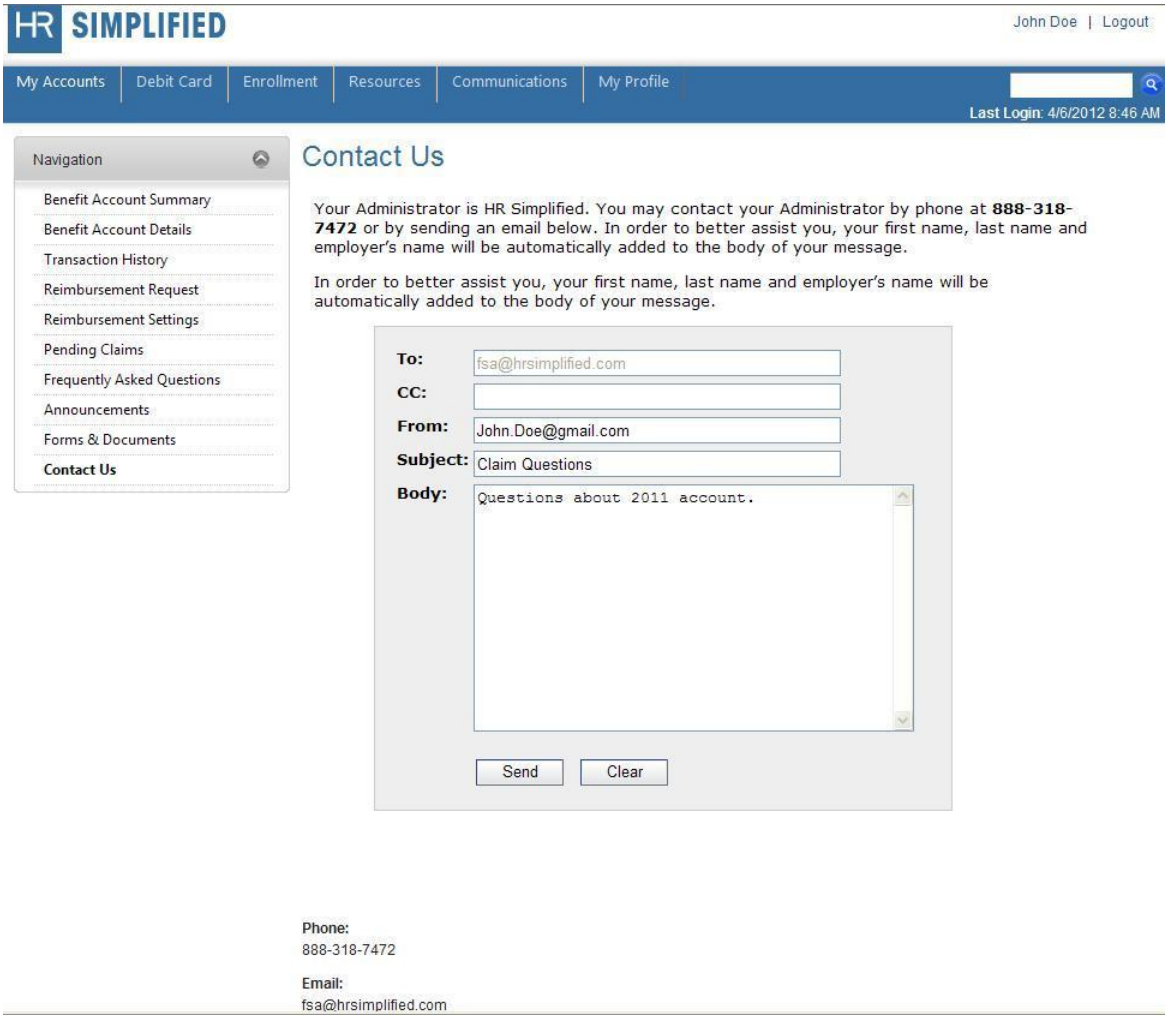
Direct Deposit Information

The Direct Deposit Information page will allow you to add or edit your direct deposit information.



Contact Administrator

Please feel free to send an email to HR Simplified by completing this form with any questions or concerns you may have.

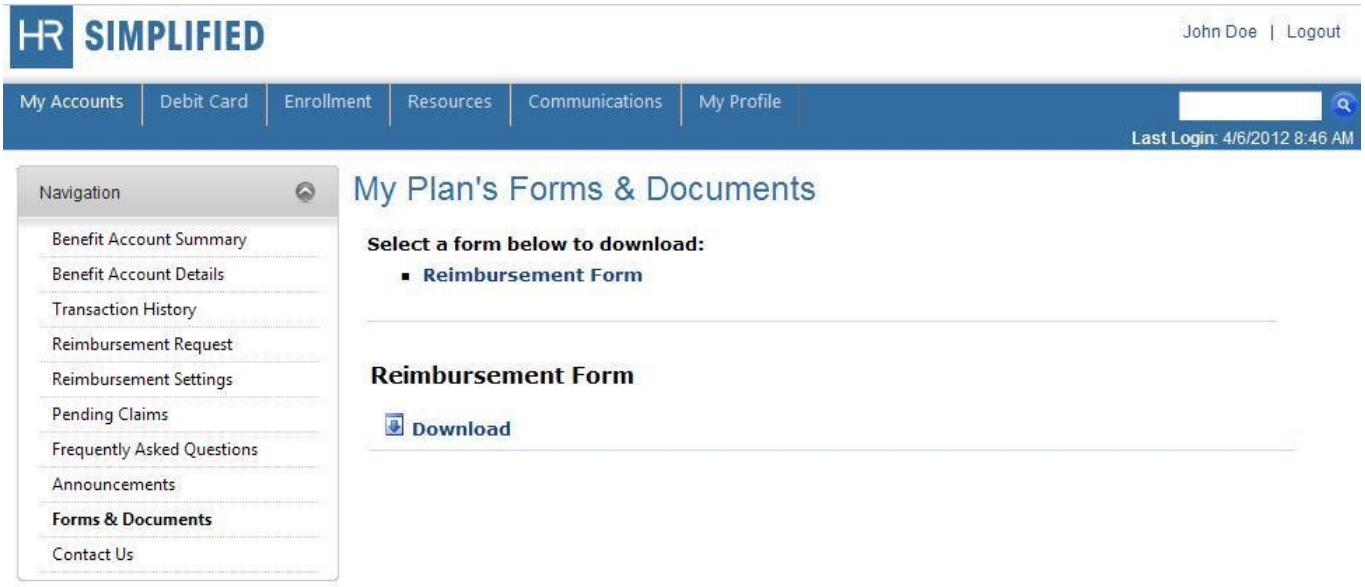


PLEASE NOTE:

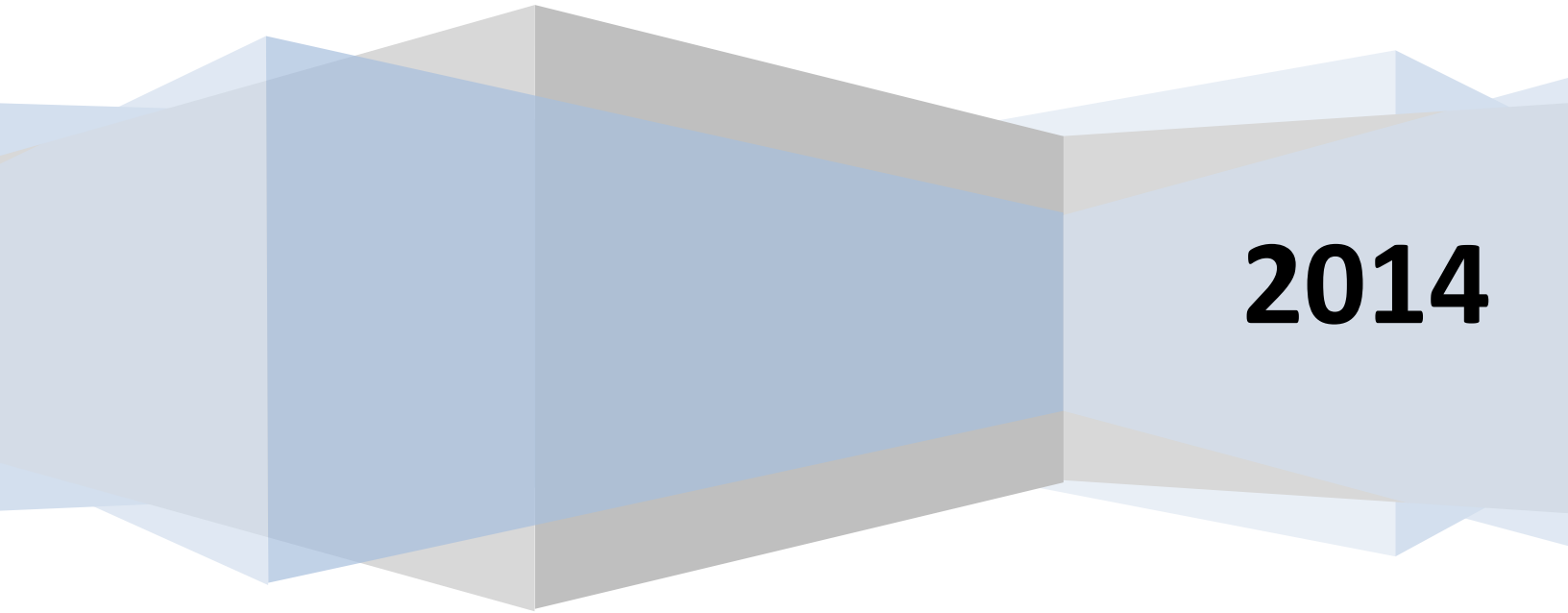
- **Multiple CC addresses are allowed.**
- **The email message does not allow rich text editing. It is plain text.**

Forms & Documents

The Download Forms page will allow you to download forms related to each of your plans.



Annual Open Enrollment Section



2014

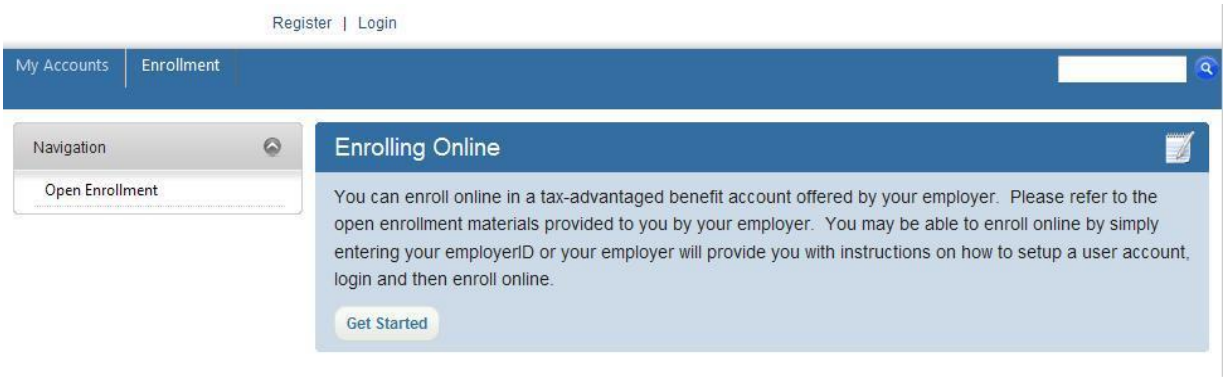
Annual Open Enrollment

To get started click the “Open Enrollment” link. Click “Get Started.”

Next select the plan you want to enroll in.

The Open Enrollment tab is available only during the Open Enrollment period determined by the employer.

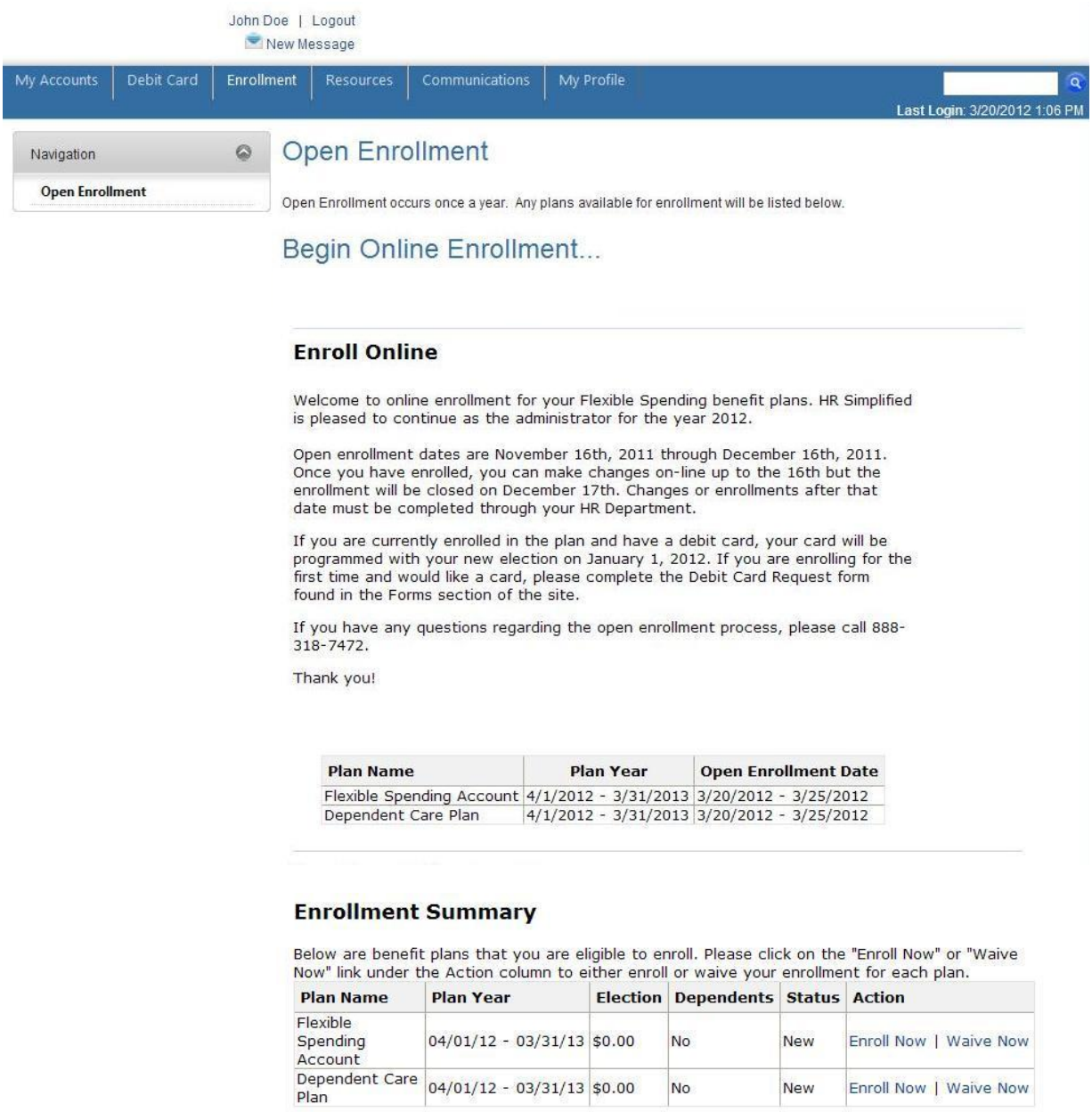
Please log onto your account, and click on Enrollment Tab.



Please make sure enroll under the correct plan:

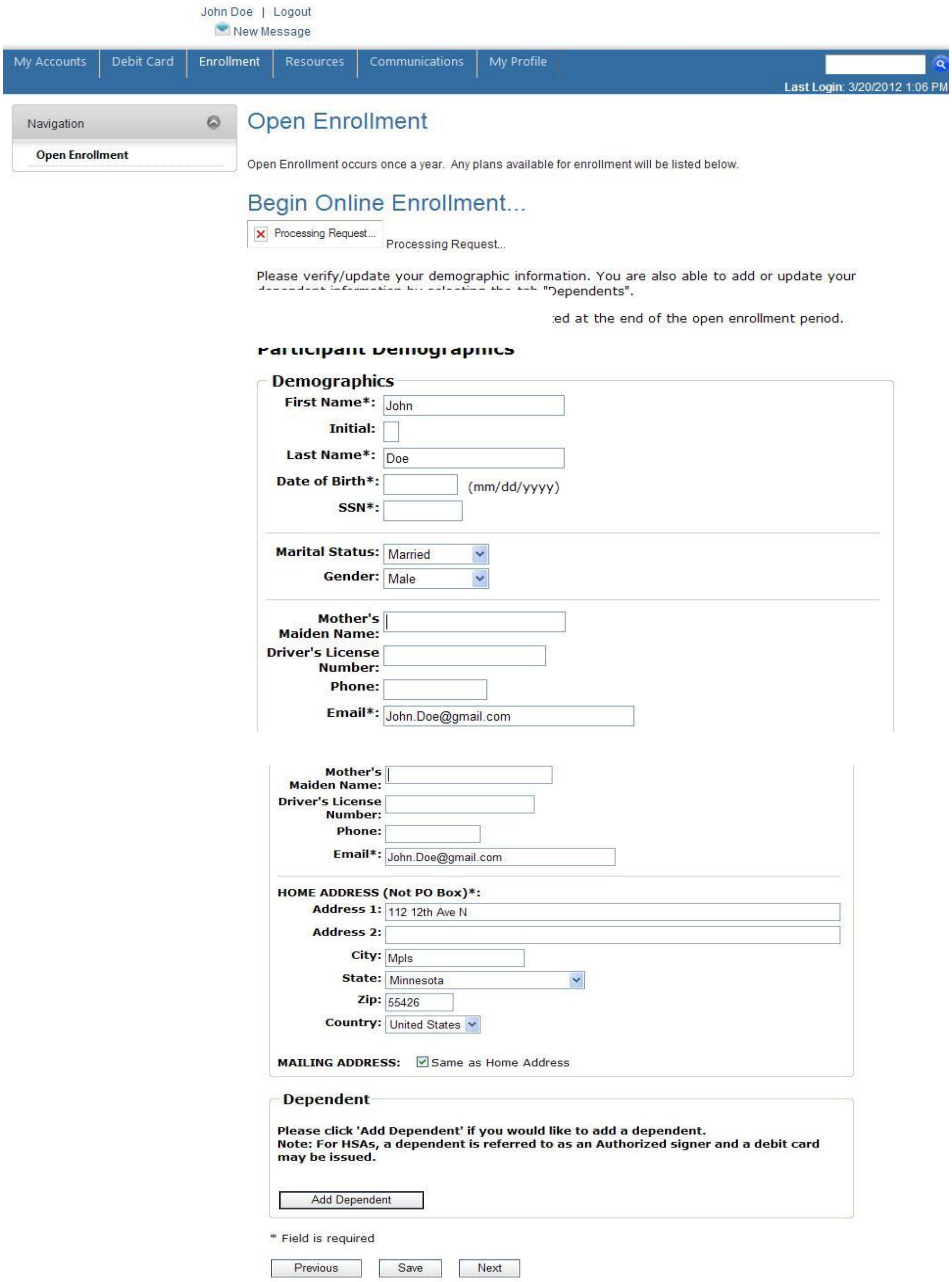
Flexible Spending Account: Medical expenses for you and any eligible Dependents.

Dependent Care Plan: Daycare Expense for children under the age of 13.



Mandatory fields are marked with an asterisk (*).

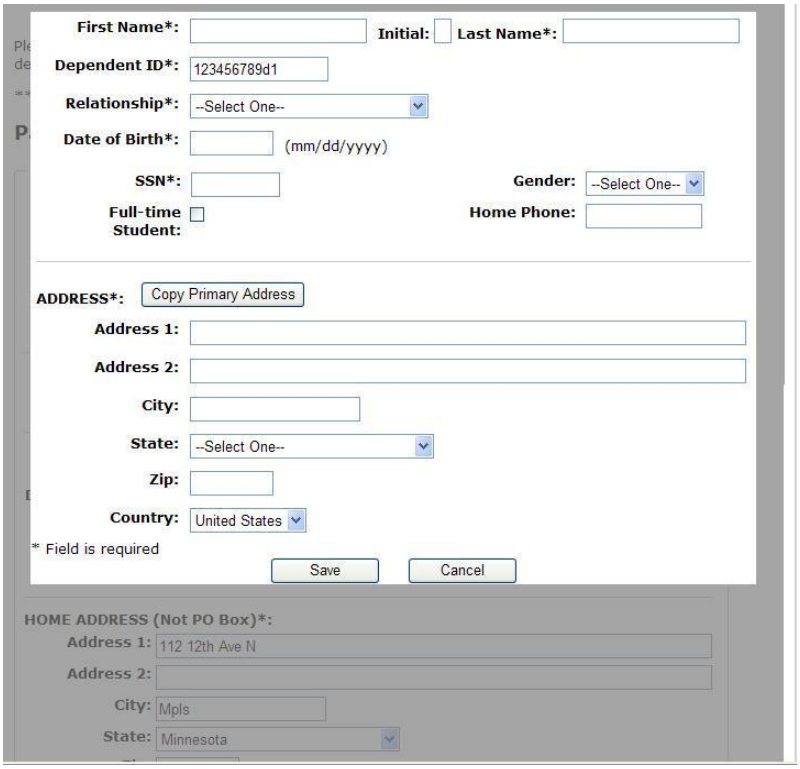
- First Name
- Last Name
- Date of Birth
- SSN #
- Email Address
- Home Address (If mailing address is same as Home Address please click in box, if different please do not select this box and add other address.)



Dependent Information

The Dependent Information page will allow you to edit your dependent demographic information.

- **Mandatory fields are marked with an asterisk (*).**
- First Name
- Last Name
- Date of Birth
- SSN #
- Email Address
- Home Address (If mailing address is same as Home Address please click in box, if different please do not select this box and add other address.)



**Your demographic information will be updated at the end of the open enrollment period.

Account Details

Plan Description: Flexible Spending Account

Plan Start Date: 4/1/2012

Plan End Date: 3/31/2013

Annual Election: 1500.00

* Annual election can be from $0.00 - $2,500.00

It is important to be aware of the basic rules of this account before enrolling. Make sure you keep these in mind when you are making your elections. We also encourage you to review the Summary Plan Description for more detailed rules regarding this PreTax Account.

1. The money you elect to put in to this account is available at the beginning of the plan year and deductions are taken all year.

2. Changes to the election you make can only be made during the plan year if you have a qualifying event.

3. Reimburesments from this account can only be made of eligible health care expenses.

4. Expenses must be incurred during the plan year. The account is subject to the "use it or lose it" rule.

Please check the following box to accept your enrollment to the plan, then click on the "Next" button:

☐ I certify that my election amount for 2012 will be used for eligible medical expenses only.

Previous Save Next

Enrollment Application

Plan Description: Flexible Spending Account

Plan Start Date: 4/1/2012

Plan End Date: 3/31/2013

Participant Demographics Edit

Name: John Doe

Billing Address: 112 12th Ave N
Mpls, MN 55426
United States

Card Shipping Address: Same as Billing Address

Phone:

Email: John.Doe@gmail.com

Date of Birth: 1/15/1979

Gender: Male

Marital Status: Married

Social Security Number: 123456789

Driver's License Number:

Mother's Maiden Name:

Participant Dependents Edit

Name	ID	Relationship	DOB	SSN	Gender	FT Student	Phone
Jane Joe	123456789d1	SpouseorCommonLawSpouse	10/15/1979	123456788	Female	No	

Address: 112 12th Ave N, Mpls, MN, 55426, United States

Account Details Edit

Annual Election: $1,500.00

Next

Enrollment Complete

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

Done

Waive Enrollment

Plan Description: Dependent Care Plan

Plan Start Date: 4/1/2012

Plan End Date: 3/31/2013

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

☑ I certify to waive my election for the 2012 plan year.

Submit Cancel