WealthCare Portal

Simplify your healthcare finances with convenient, online access to your tax-advantaged benefit account.
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Getting started
Visit wealthcareportal.com to access the WealthCare Portal.

Registration

Step 1: Click register to create an account.

Step 2: Fill in the registration form.

1. Choose a username and password
2. Enter your name and email address
3. Choose to use your employer’s name or card number (if you’ve received a benefit debit card) as your registration ID and enter it in the field below
4. Enter your employee ID

   Note: Your employee ID may be your health plan member number, Social Security Number or another number provided by your account administrator

5. Check the box after you read and accept the Terms of Use
6. Click register to submit your information. The process may take a few seconds. Do not click your browser’s back button or refresh the page.

Step 3: Select 4 security questions and provide your secret answers to authenticate your account.
Step 4: Review and confirm your email address.

Step 5: Review the information you provided and confirm that it’s accurate. Use the edit button to make any changes. Click submit when you’re finished.

Signing in
Use the username and password you created to access your account. You may be prompted to answer your security questions as well.
Menus

With WealthCare Portal you can manage your healthcare spending accounts, claims and transactions in one easy place.

Use the icons in the upper right of the screen to shop with your benefit accounts, view notifications, or edit your profile.

FSA Store

Click the FSA Store icon to shop for FSA-eligible products.

Notifications

Click notifications to view your news and alerts. The number in red tells you how many unread notifications you have.

Drop-down menu

Click the drop-down menu to access your:
  - Profile
  - Debit card information
  - Communication settings
  - Contact us
  - Log out
Main menu
Expand the hamburger menu on the upper left of your personal dashboard to navigate to your accounts, claims and other resources.

Click to expand the menu.

Use the home button to return to the main screen of your personal dashboard from any other screen within WealthCare Portal.

Checking your account balance(s)
The benefit account summary page provides a quick view of your account balance(s).

Get there by clicking menu > my accounts > benefit account summary

Each of your accounts displays in its own box with the account type listed on top. A flexible spending account (FSA) is displayed in the image below.

Quick links to additional account details, a list of transactions, claim submission, and other tools!

Your annual election balance, split into how much has been spent and how much is still available to spend.
Submitting a claim or expense

The *add expense* wizard will walk you through a series of questions to help you submit your request correctly. You can use this wizard for reimbursement requests.

To use the expense wizard, click menu > claims > add new expense.

Payments can be made directly to yourself. When paying yourself, you may choose to receive a check via mail or set up direct deposit to your bank account.

You may attach receipts to your claim and expense entries to validate, if necessary.
Viewing claims and expenses

View claims and transactions on the account activity page. Use the buttons on top to filter transactions by year, plan, status and more!

To view, click menu > claims account activity

Click on an individual transaction to view its details and take action, as needed. Based on your policy and purchases, transactions may be marked as Approved, Pending, Action Required, or Denied.

If a receipt is required, the option to attach one will show within the transaction. Adding a receipt may also help resolve pending transactions faster.

Click add receipt to attach your document for review.
Your user profile

Click the drop-down next to your **username** and select **profile** to view your personal information.

From this page, you can see your:

- Phone number and address
- Reimbursement method
- Dependent information
- And more!

To change your personal information, click **edit profile** from within your profile page, or **edit dependent** from your list of dependents below.

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**Note:** You can update your **mobile phone number** from within your profile, however, you may still need to update your SMS notifications within the **communication settings** page to change your alert preferences.
Debit cards
You can view the benefit account debit cards that have been issued to you from within WealthCare Portal.

To view your benefit account debit cards, click the drop-down by your username and select debit cards.

Click on an individual card to view more information. From here you can:

- Activate a new card
- View the card pin
- Report the card lost or stolen

You can also request cards for your dependents, if they haven’t received one, by clicking issue debit card next to their name at the bottom of the page.

Managing alerts & messages
The notification center is your place to view account messages, items awaiting action, and potential opportunities.

To view, click notifications on your personal dashboard. The number in red alerts you of unread notifications.

Click on an individual message to see the full text.
Messages provide important information about your account(s). Be sure to check your notifications for crucial messages.

Opportunities are tips and tricks that can help you maximize your benefit accounts, such as suggesting to switch to direct deposit reimbursements or electronic-only statement delivery.

Changing your alert preferences

Change your alert preferences from the communication settings page. Click the drop-down next to your username and select communication settings.

For each alert, choose whether you receive mobile, email, both, or no notifications.

Click save when you are done editing your preferences.

You can also update your email address and register your mobile phone for SMS text alerts.