HR SIMPLIFIED
a WEX™ company

WealthCare Portal

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

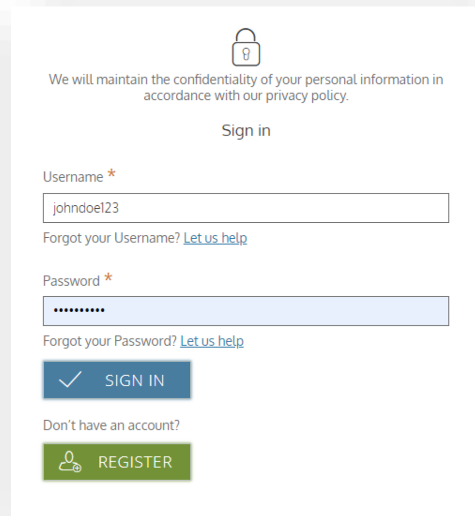
Contents

Getting started

Visit wealthcareportal.com to access the WealthCare Portal.

Registration

Step 1: Click **register** to create an account.

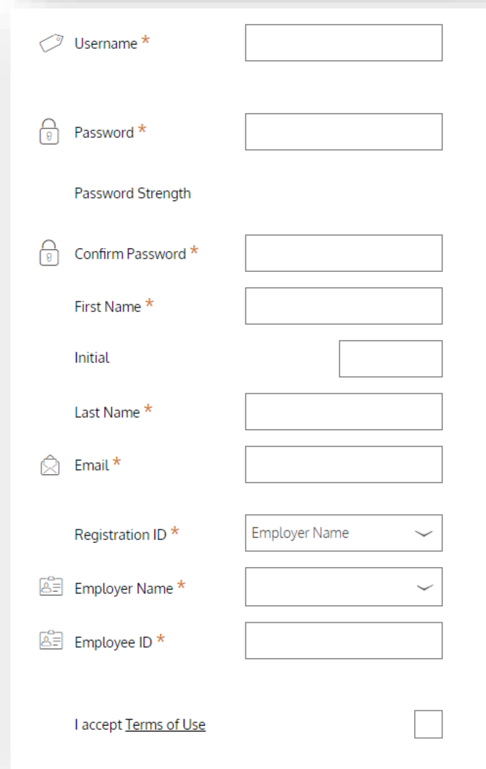


Step 2: Fill in the registration form.

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

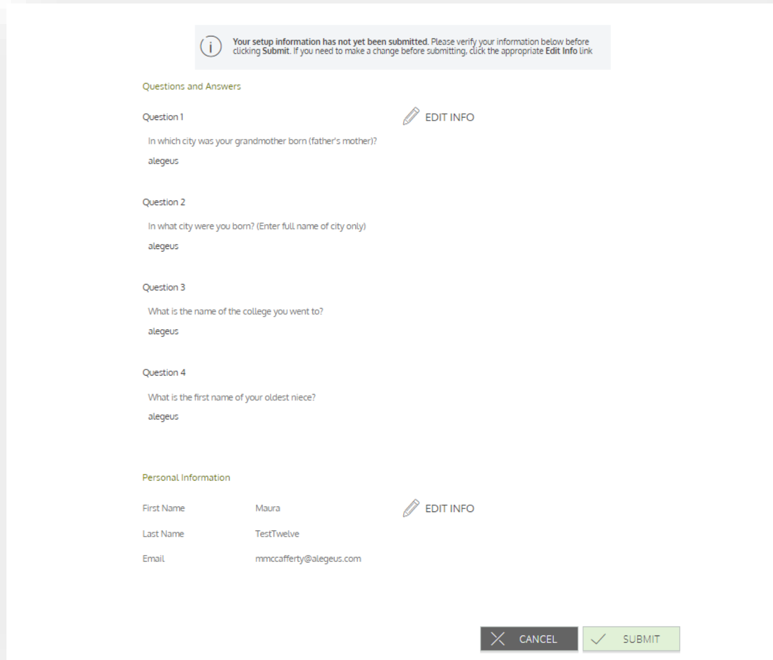
5. **Check** the box after you read and accept the Terms of Use
6. Click **register** to submit your information. The process may take a few seconds. **Do not** click your browser's back button or refresh the page.



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.

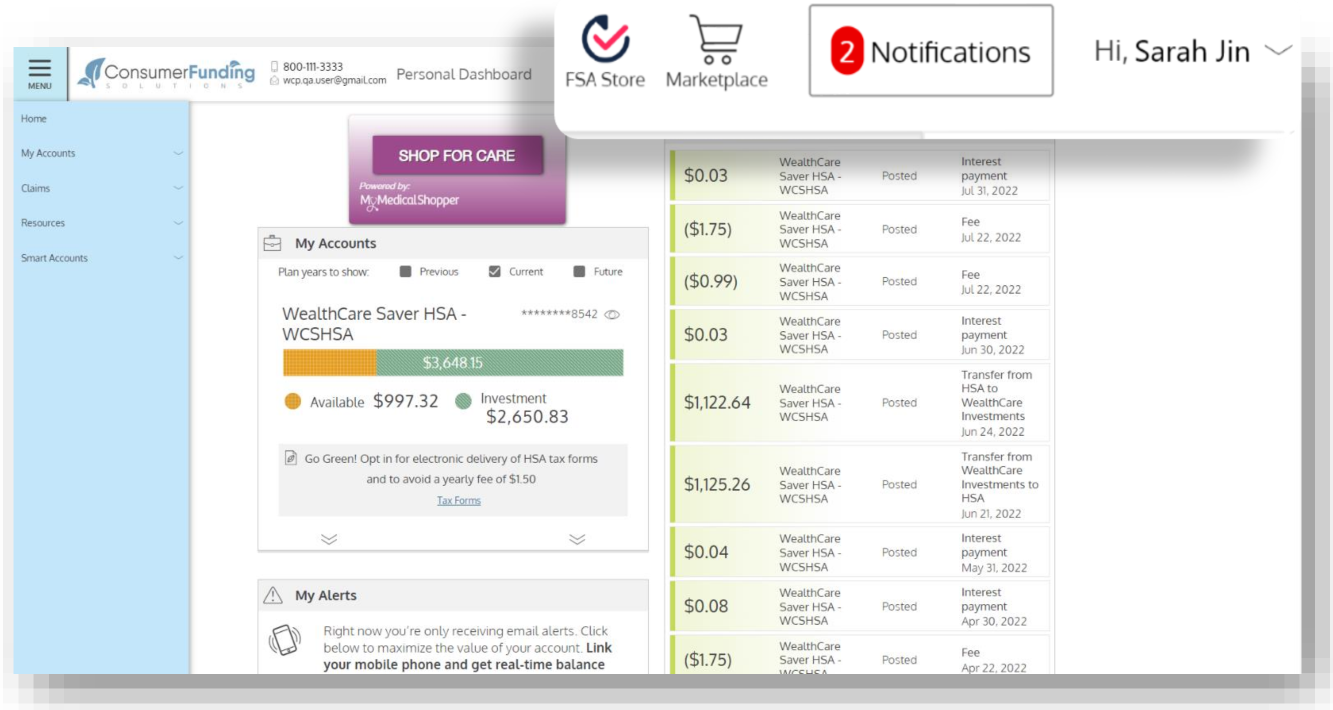


Signing in

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

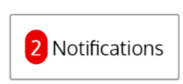
Menus

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

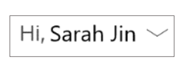


Use the icons in the upper right of the screen to shop with your benefit accounts, view notifications, or edit your profile.

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.

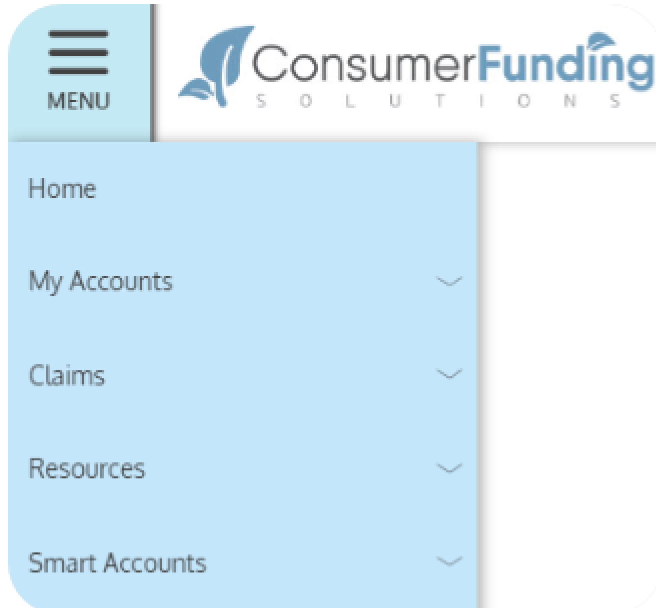


Drop-down menu
Click the **drop-down menu** to access your:

- 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.

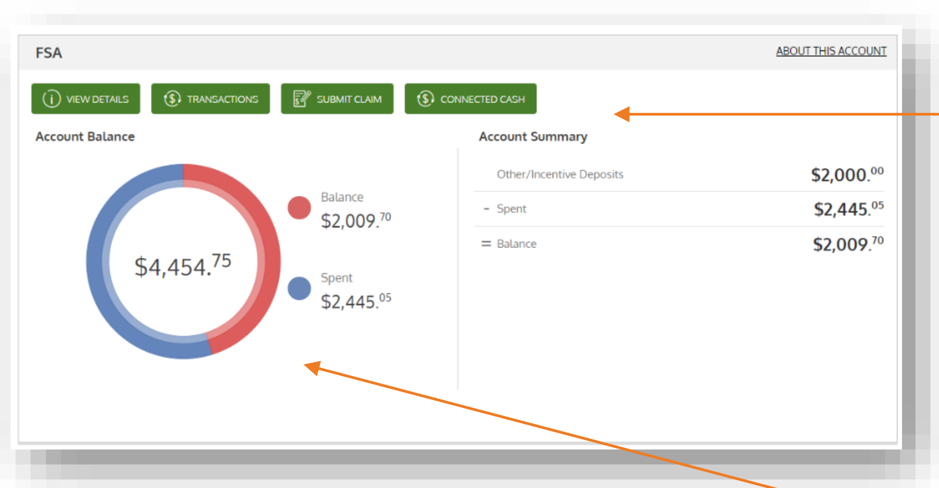
Use the **home** button to return to the main screen of your personal dashboard from any other screen within WealthCare Portal.

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.

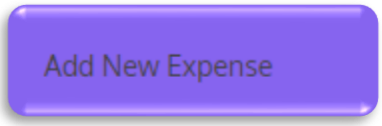


Quick links to additional account details, a list of transactions, claim submission, and other tools!

Your **annual** election balance, split into how much has been spent and how much is still available to spend.

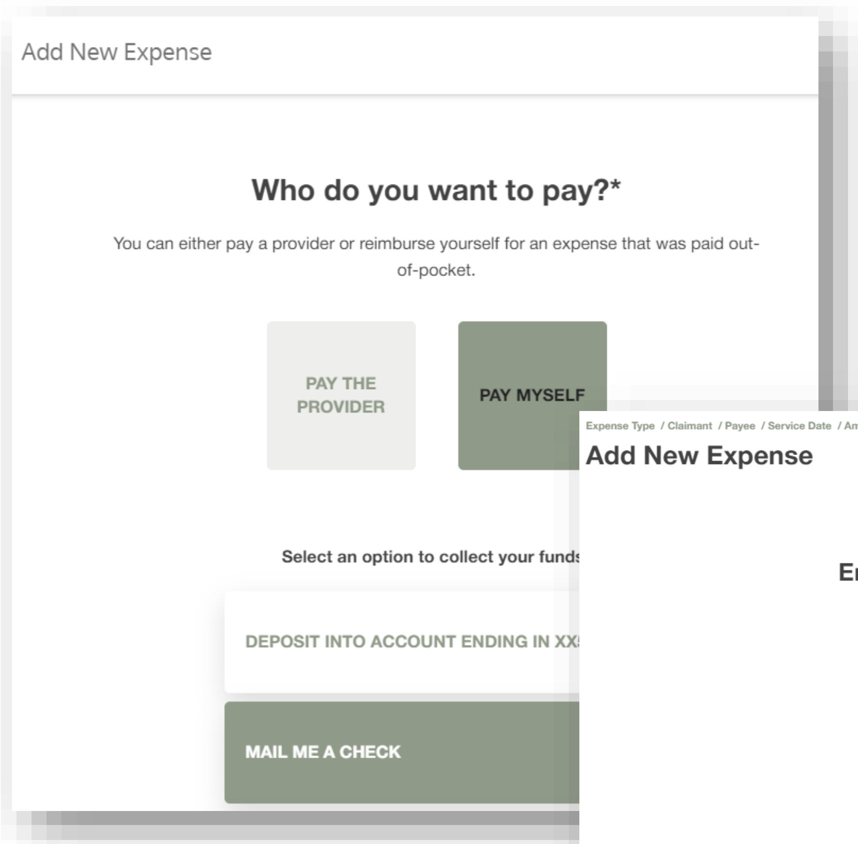
Submitting a claim or expense

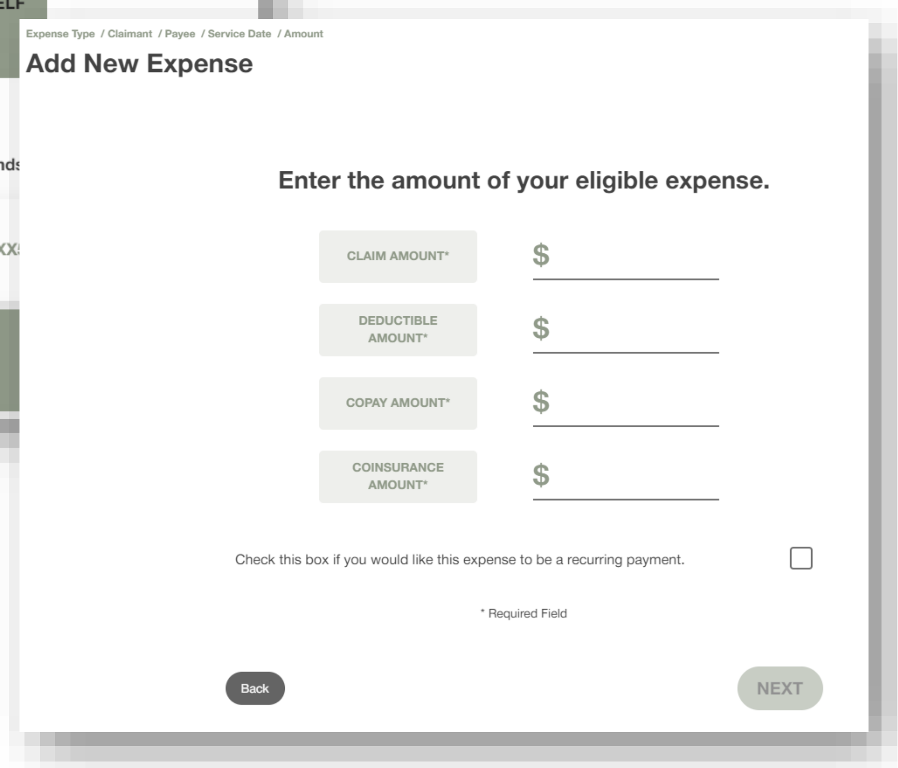
The *add expense* wizard will walk you through a series of questions to help you submit your request correctly. You can use this wizard for **reimbursement requests**.



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.



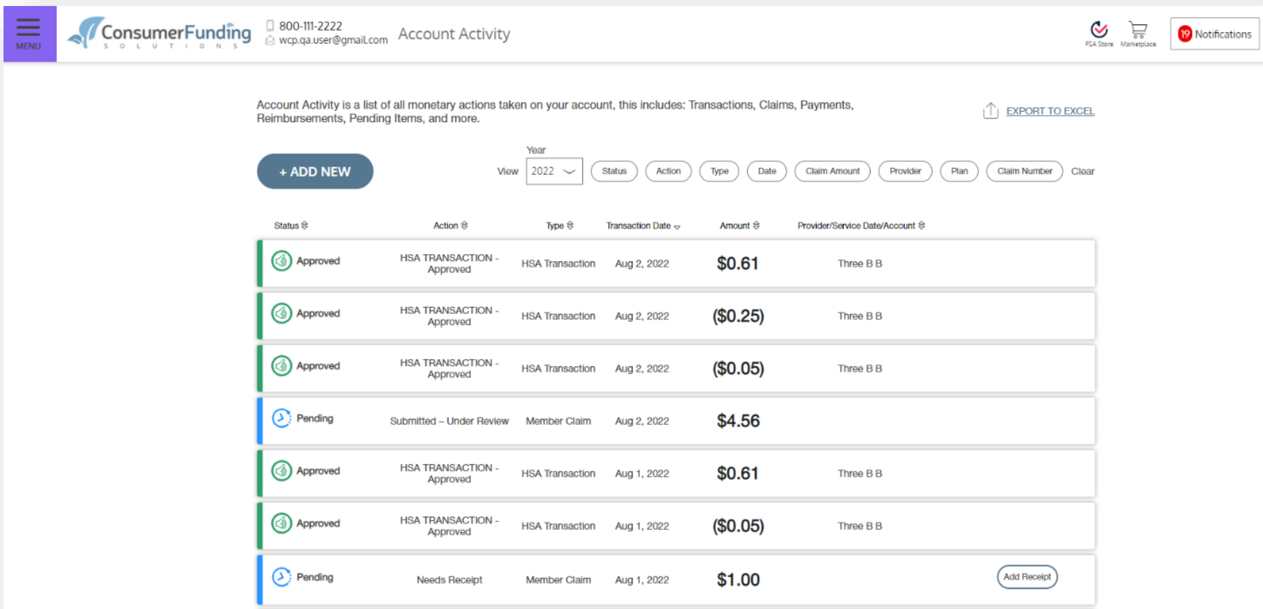


You may attach receipts to your claim and expense entries to validate, if necessary.

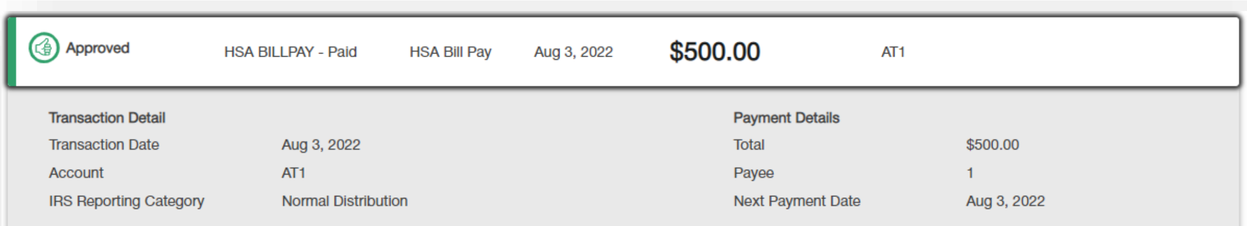
Viewing claims and expenses

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

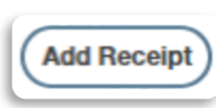
To view, click **menu** > **claims account activity**



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.



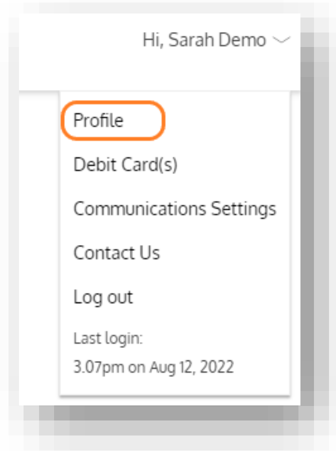
If a receipt is required, the option to attach one will show within the transaction. Adding a receipt may also help resolve pending transactions faster.



Click **add receipt** to attach your document for review.

Your user profile

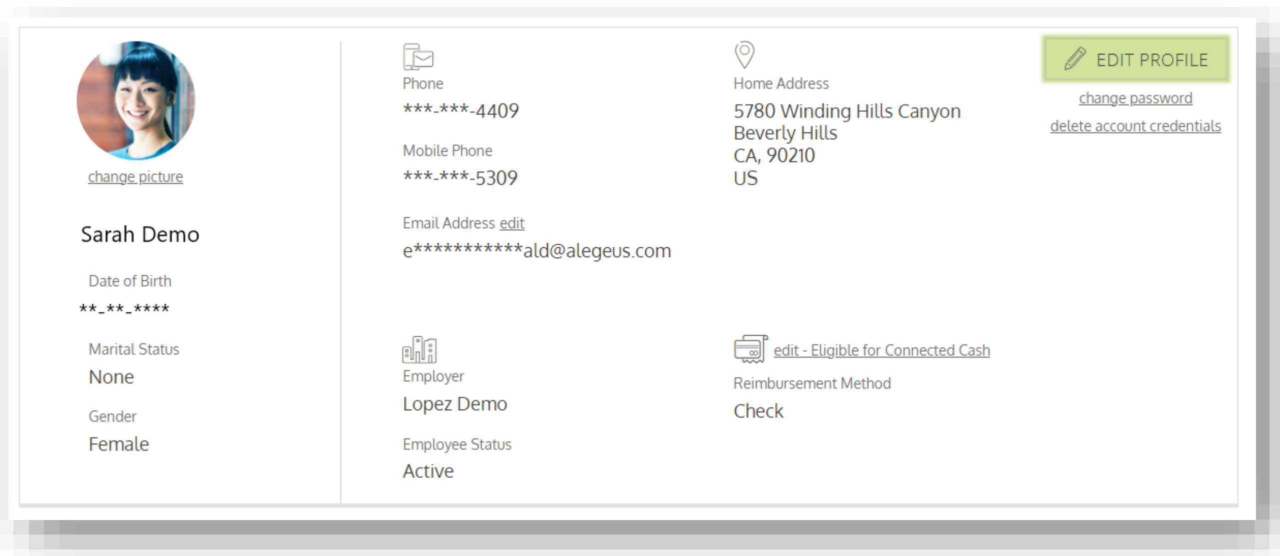
Click the drop-down next to your **username** and select **profile** to view your personal information.



From this page, you can see your:

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

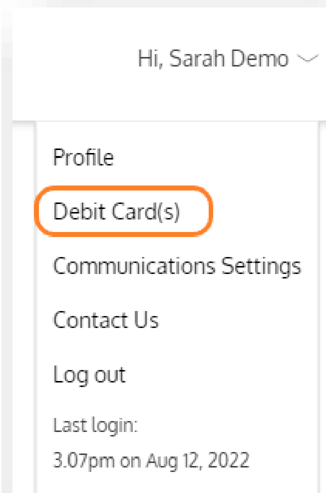
To change your personal information, click **edit profile** from within your profile page, or **edit dependent** from your list of dependents below.



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.

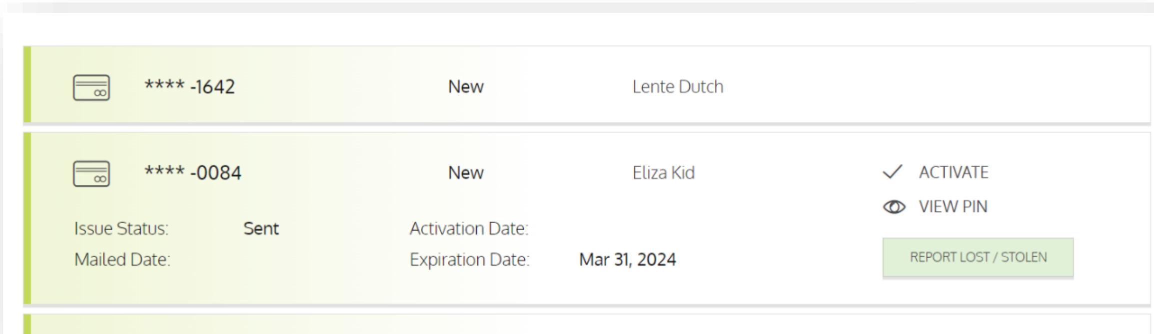


To view your benefit account debit cards, click the drop-down by your **username** and select **debit cards.**

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

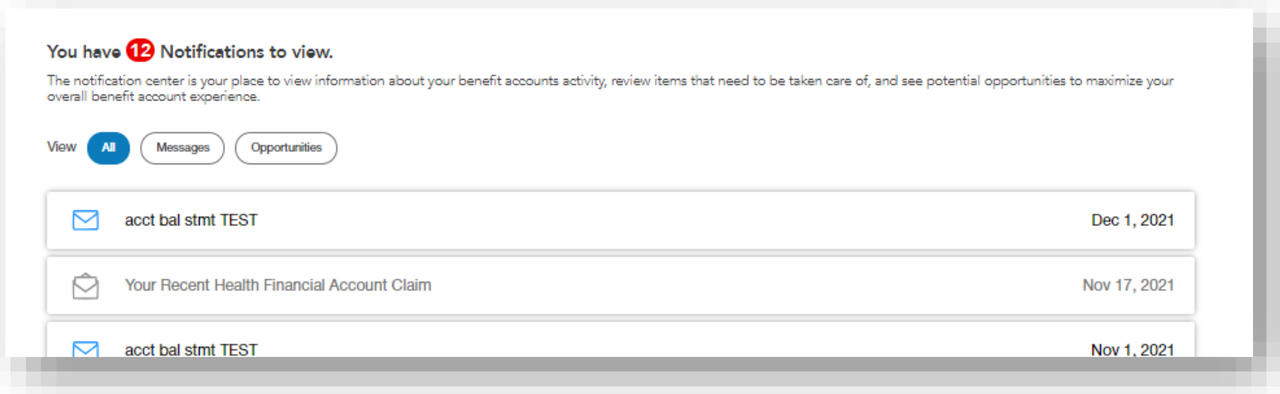


Managing alerts & messages

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.

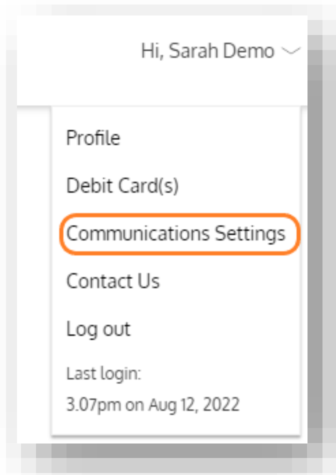
Changing your alert preferences

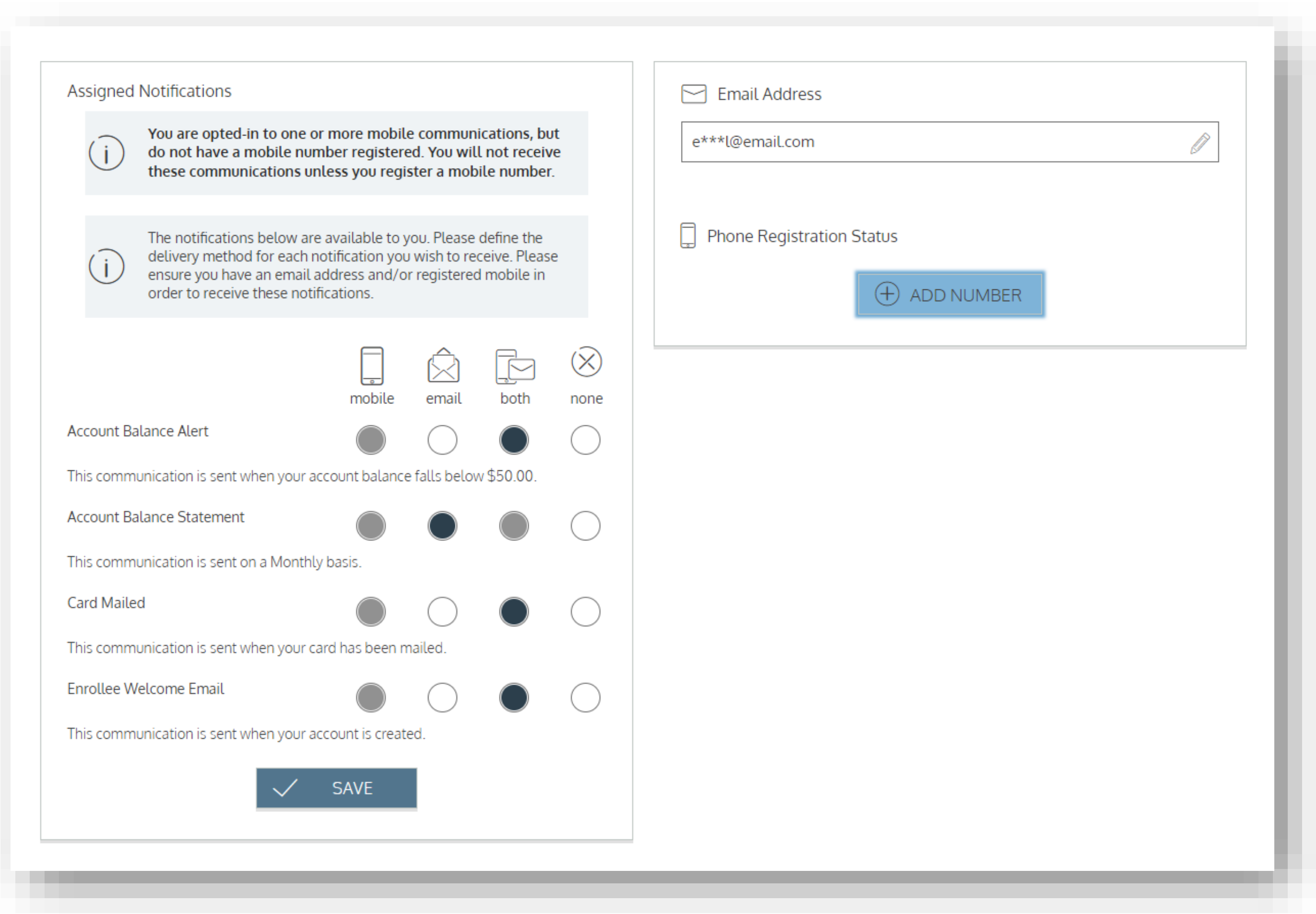
Change your alert preferences from the communication settings page. Click the drop-down next to your **username** and select **communication settings.**

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.




Assigned Notifications
You are opted-in to one or more mobile communications, but do not have a mobile number registered. You will not receive these communications unless you register a mobile number.
The notifications below are available to you. Please define the delivery method for each notification you wish to receive. Please ensure you have an email address and/or registered mobile in order to receive these notifications.
mobile
email
both
none
Account Balance Alert
This communication is sent when your account balance falls below $50.00.
Account Balance Statement
This communication is sent on a Monthly basis.
Card Mailed
This communication is sent when your card has been mailed.
Enrollee Welcome Email
This communication is sent when your account is created.
SAVE
Email Address
e***l@email.com
Phone Registration Status
ADD NUMBER