



How Do I...

A member's guide to the
BenefitWallet website

Summary of Contents

What can I find on the home page?

How do I access recent account activity?

How do I make payments and reimbursements?

How do I make an electronic contribution?

How do I set up HSA alerts?

How do I access detailed account information?

How do I order checks?

How do I access HSA statements?

How do I reorder a debit card?

Where is my HSA Filing Cabinet?

How do I access forms and educational materials?

What Can I Find on the Home Page?

Account Balance

Important graphs

Transactions

This screenshot shows the HSA account home page for HOMER SIMPSON. At the top, the BenefitWallet logo is on the left, and navigation links for Home, My Account(s), My Money, Resource Center, and Contact Us are on the right. The main content area features a blue header with the account type 'HSA', an 'Open' button, and three balance boxes: Total Value (\$1,000.75), Available (\$1,000.75), and Investments (\$0.00). Below this is a menu with options like 'Make an HSA Contribution' and 'Reimburse Myself'. The 'My Contributions' section shows a 2018 dropdown and a bar chart with coverage limits of \$4,400 for individual and \$7,750 for family. The 'My Balance' section is partially visible on the right.

This screenshot shows the DCFSA account home page for CHARLES BURNS. The header includes the BenefitWallet logo and navigation links. The main content area has a green header with the account type 'DCFSA', a date range '09/01/2017-08/31/2018', and a balance of \$39.00. Below this is a menu with options like 'Reimburse Myself' and 'Pay a Provider'. The 'My Activity' section features a donut chart showing a balance of \$39.00 and payments of \$212.00, with an eligible amount of \$1,500.00. The 'My Reminders' section lists tasks like 'Last day to incur expenses' and 'Last day to submit claims'. A 'Welcome to the new Member Portal!' banner is at the bottom right.

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

BenefitWallet HOMER SIMPSON

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

HSA Open **\$1,000.75** **\$1,000.75** **\$0.00**
 XXXXXXXXXXXX0166 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
 \$498.05 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 Make an Electronic Contribution?

Select *Make an HSA Contribution* from the quick links

BenefitWallet HOMER SIMPSON

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

HSA Open
 XXXXXXXXXXXX0166
 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)**
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My Balance

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

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How Do I Set Up HSA Alerts?

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

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

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

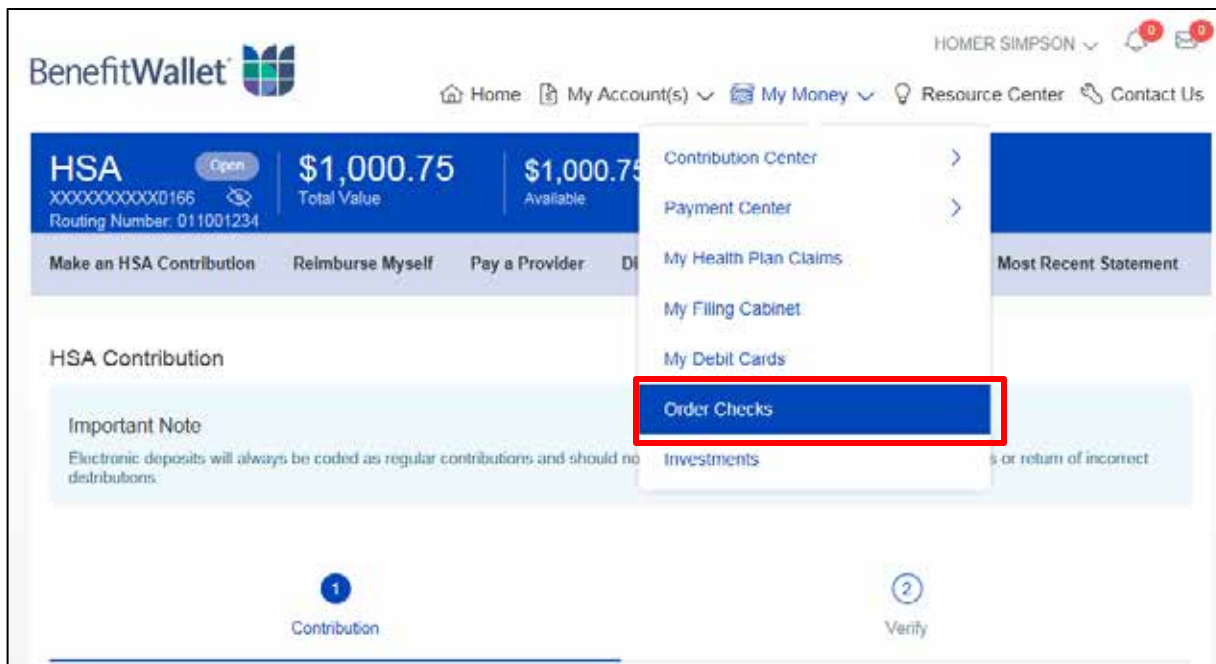
Dec-2016 Jan 2017 Feb 2017 Mar 2017 Apr 2017 Feb 2018

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 menu includes options like '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, there are sections for 'My Contributions' (showing a year-to-date contribution of \$498.03 and coverage limits of \$4,400 for individual and \$7,750 for family) and 'My Balance' (showing a line graph of the account balance over time). A 'Welcome to the new Member Portal!' banner is also visible on the right side.

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
\$498.03 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

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.

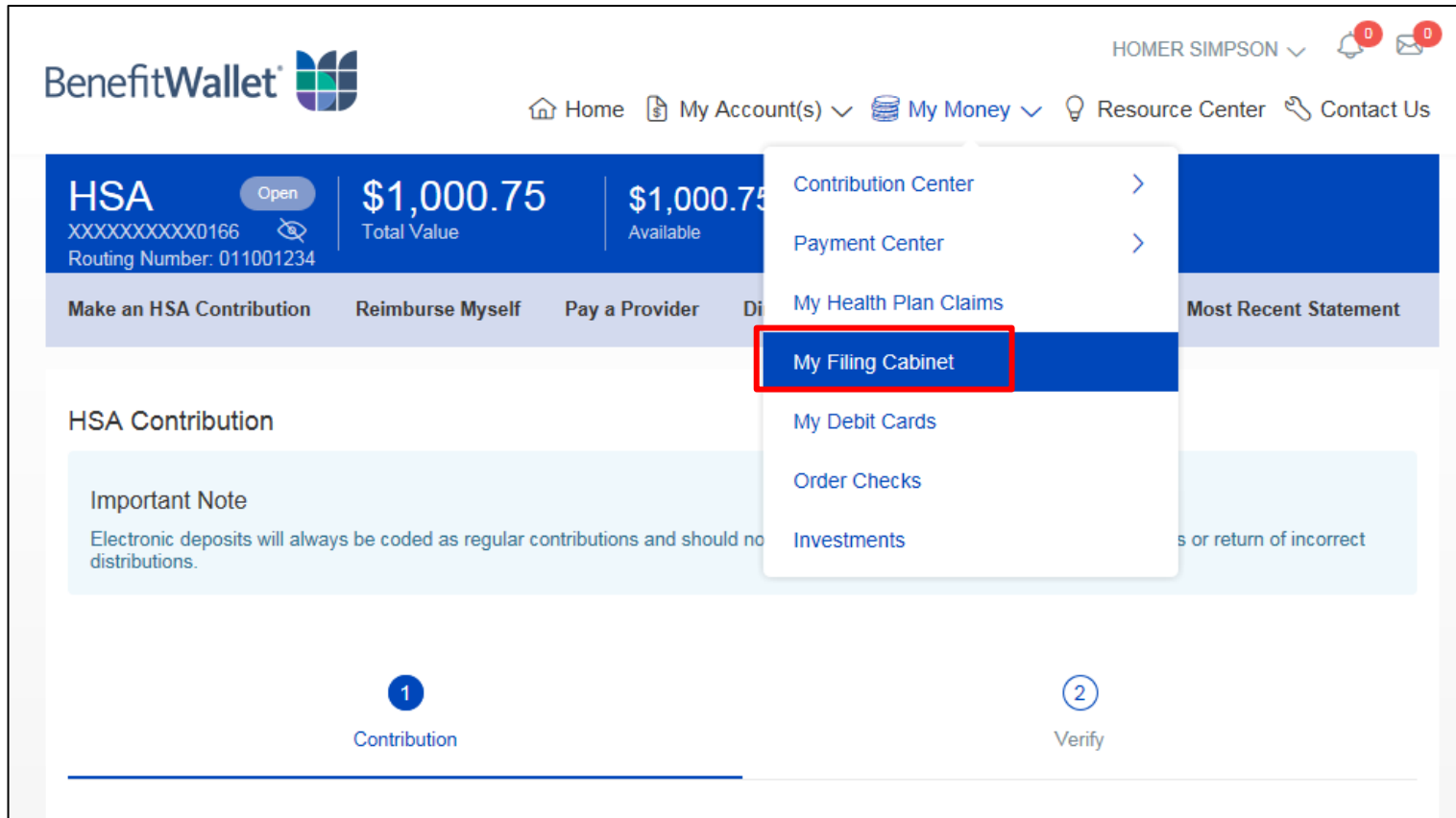
How Do I Reorder a Debit Card?

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 options: 'Contribution Center', 'Payment Center', 'My Health Plan Claims', 'My Filing Cabinet', 'My Debit Cards' (highlighted with a red box), 'Order Checks', and 'Investments'. The background shows an HSA account summary with a balance of \$1,000.75 and a navigation bar with options like 'Make an HSA Contribution', 'Reimburse Myself', and 'Pay a Provider'. Below this is an 'HSA Contribution' section with an 'Important Note' and a progress indicator with steps '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 shows the BenefitWallet website for a user named CHARLES BURNS. The account is a DCFSA (Dependent Care Account) with a balance of \$39.00. The account is active and has a period from 09/01/2017 to 09/31/2018. The account is linked to HSA and FSA accounts. The HSA balance is \$2,047.95 and the FSA balance is \$1,329.67. The Resource Center is visible, showing a list of DCFSA Education Materials including: DCFSA Overview, DCFSA Benefit Highlights, DCFSA Enrollment Guide, HSA/DCFSA/HRA Compare, and DCFSA Eligible Expenses.

The screenshot shows the BenefitWallet website for a user named HOMER SIMPSON. The account is an HSA (Health Savings Account) with a total value of \$1,000.75 and an available balance of \$1,000.75. The account is linked to an investment account with a balance of \$0.00. The Resource Center is visible, showing a list of HSA Education Materials including: HSA Overview, Five Reasons to Open Your HSA, Investments, Making HSAs Work for You, HSA/FSA/HRA Compare, HSA Transfer Process, and HSA Eligible Expenses. There are also sections for Videos (HSA Overview, HSA Tax Savings, Tax Guidelines for HSAs, HSA Tax Forms) and Forms (Personal Information, Master Signature Card, Additional Signature Authorization Form, Recopen 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' with notification icons. A navigation bar includes 'Home', 'My Account(s)', 'My Money', 'Resource Center', and 'Contact Us' (highlighted with a red box). Below this is a summary card for the HSA account, showing a total value of \$1,000.75, available balance of \$1,000.75, and \$0.00 in investments. A secondary navigation bar offers options like 'Make an HSA Contribution', 'Reimburse Myself', and 'Pay a Provider'. The main content area features 'My Contributions' for 2018 with a chart showing year-to-date contributions of \$468.05 against \$4,400 individual and \$7,750 family coverage limits. 'My Balance' shows a line chart of account activity from Dec-2016 to Feb-2018. A promotional banner on the right reads 'Welcome to the new Member Portal!' with a call to action to find important information.

BenefitWallet®

