



Quick Reference Guide

Log-in Screen

First Time Use/Log-in Screen

When you launch the app, you log in here.

- A. Create new account
- B. Sends your User ID to you
- C. Create a new password
- D. User ID/Password entry
- E. Remember User ID/Password

Account Balances Screen

View your account balance information

- A. Account or Plan Design Name
- B. Current Plan Year
- C. FSA Account Balance
- D. HRA Benefit Remaining
- E. File A Claim
- F. Benefits Card Transactions
- G. View Payment History
- H. Settings

Account Balances Screen

File a Claim Screen

Enter the following information on the form, attach a documentation image and click "Submit" to file a claim instantly.

1. Enter the Date of Service/Service Start Date
2. Choose a Plan Type
3. Enter your Claim Amount
4. Choose or type your Provider
5. Choose an FSA Expense Type
6. Assign an HRA Dependent

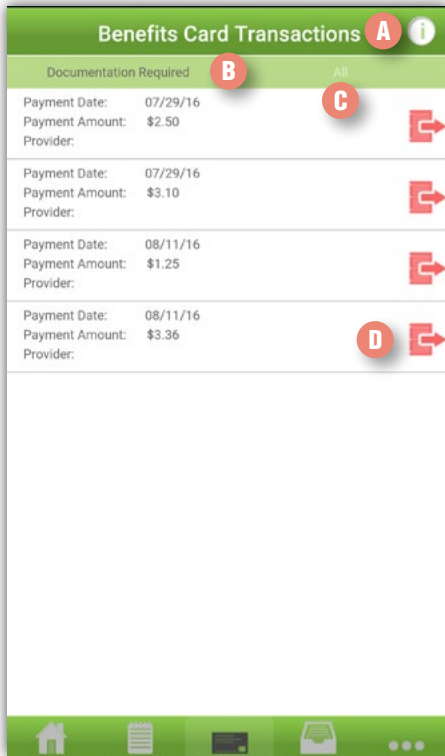
Attach documentation and submit:

7. Click on "Attach Image"
8. Choose "From Photo Library", or "Take a New Photo" (attach one file per claim)
9. Check the box to agree to the Terms (click "Signature Requirements" to view Terms)
10. Submit - Confirmation email is sent to your address on file; second email is sent once the claim is processed.

File A Claim Screen



Benefits Card Transactions Screen



Benefits Card Transactions Screen

A badge appears over the Benefits Card icon indicating the number of transactions requiring documentation.

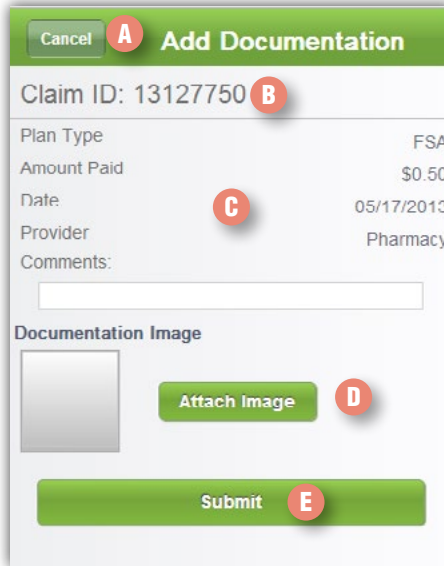
Click on the Benefits Card icon to view transactions.

You can view all transactions or just those requiring additional documentation.

Click on a row to view additional information.

- A. Click icon to view Information Screen
- B. View transactions requiring documentation
- C. View all transactions
- D. Benefits Card Transaction Screen icon

Add Documentation Screen



Add Documentation Screen

Click on a row from the Benefits Card Transactions screen requiring documentation (a row with the red “documentation” icon) to view the Add Documentation screen.

You can attach an image of your documentation from your photo library or take a picture of your documentation using your smartphone camera.

- A. Click “Cancel” to return to previous screen
- B. Claim ID reference number
- C. Transaction information
- D. Access library or camera
- E. Submit your documentation

Information Screen

This icon [] represents a transaction that needs documentation.

This icon [] represents a transaction that does not currently need action on your part. There are two reasons that a transaction may be in this status.

1. Your transaction has been successfully verified. No further action is needed.

2. We are currently attempting to electronically verify the information that is needed to document your transaction. Please remember to save your itemized receipts in case we need them in the future.

This icon [] represents a transaction that is ineligible and needs repayment.