



BBP Admin

BENEFITS ADMINISTRATION

COBRA, FMLA, FSA, HRA, HSA, LIFESTYLE, TRANSIT



WealthCare Portal

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

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GET STARTED

- Visit <https://betterbusinessplanning.wealthcareportal.com/Page/Home> to access the WealthCare Portal.

Register

- *Click **REGISTER** to create an account.

Complete your registration using these steps:

1. Enter your first name, last name, and zip code. If you received a benefit debit card, check the box to enter the card number and expedite the registration process.
2. To keep your account safe, we'll send you a special code for verification. Check your email or texts for the code.
3. Enter your verification code and click **NEXT**.
4. Create a username and password for your account.
5. Select your security questions and provide your answers. To keep your account safe, you may be asked these questions randomly during subsequent logins.
6. Confirm your email address.
7. Review your answers and submit your registration.
8. Click **DONE** to sign in.

STEP 1 > STEP 2 > STEP 3 > STEP 4 > STEP 5 > STEP 6

You are on step 1 of 6

Let's get you registered - please provide the information below.

First Name *

Last Name *

Zip Code *

Check this box if you received a debit card for your benefit account.



*NOTE: For expedited registration your info should already exist in the system or you should have an Employee ID. Your Employee ID could be your health plan's member number, your SS#, an ID provided by your employer, or an alternate ID created by your plan administrator. Please start with your SS#.

- You may also be asked to enter a Registration ID which could be your plan debit card number or your employer name/employer ID.
- If you were not provided with the necessary ID numbers, please contact **account administrator**.

Sign In

1. Enter the username and password you created.
2. Click **SIGN IN**.
3. Enter the code sent to your email or text.

You may be asked to answer one of your security questions.

YOUR PERSONAL DASHBOARD

Profile Menu and Links

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

Use the profile menu to view and edit your profile, use the icon links to shop and view notifications.



Profile Drop-Down Menu

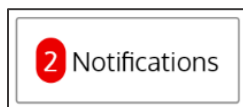
Click the drop-down arrow next to your name to view:

- Profile
- Debit card information
- Communication Settings
- Contact Us
- Log out link
- Last log in info



Marketplace


Click Marketplace link to access the CDH marketplace where you can use your eligible FSA and HSA accounts for purchases.



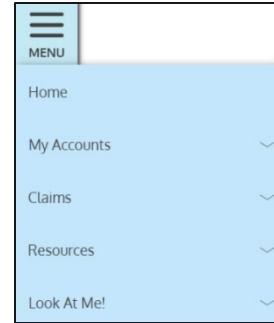
Notifications

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

Main Menu

Click to expand the hamburger  menu on the upper left of your personal dashboard. Use this menu to navigate to your accounts, claims, and resources.

Click *Home* to return to the main screen from any other screen.



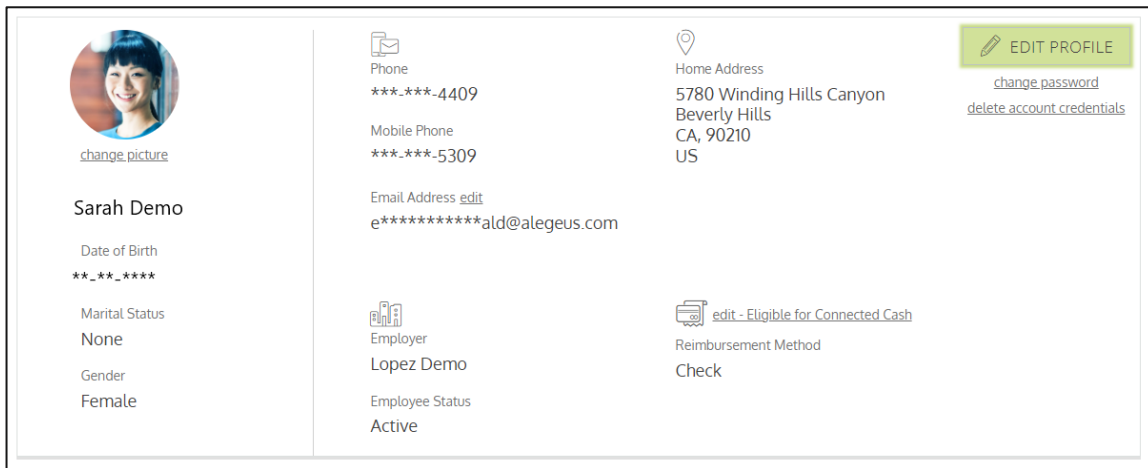
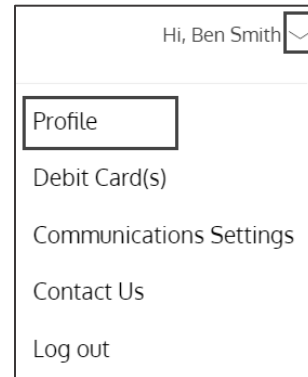
Navigate Your Profile


Click the drop-down arrow next to your name and select *Profile*.

- To edit dependent profiles click *EDIT PROFILE* or *EDIT DEPENDANT*.

From the Profile screen you can view and edit your:

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



 ***NOTE:** You can update your mobile number from within your profile, however, you may still need to update your text notifications in communication settings to change your alert preferences.

Manage Your Debit Cards

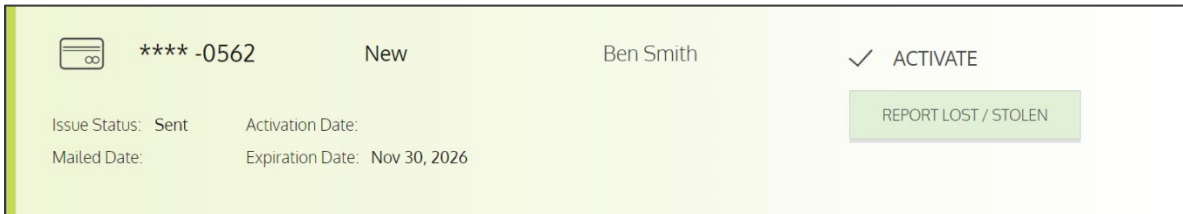
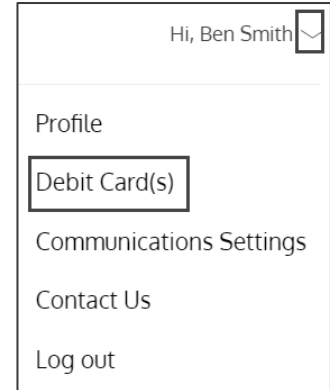
You can view your benefit account debit cards issued to you and your dependents from within WealthCare Portal.

To view your benefit account debit cards, click the drop-down next to your name and select debit cards.

Click on an individual cards to view more information.

From the Debit Card screen you can:

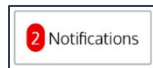
- Activate a new card
- View a card pin
- Report the card lost or stolen
- Request cards for dependents



Manage Alerts & Messages

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

To view, click *Notifications*



- 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). Check your notifications for crucial messages.

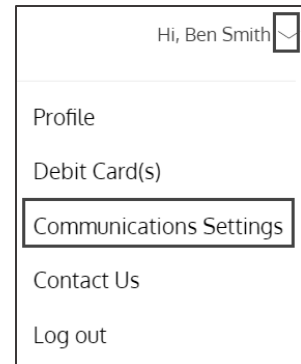


Opportunities are tips and tricks that can help you maximize your benefit accounts, such as suggesting to switch to direct deposit reimbursements or electronic-only statement delivery. You may also be presented with opportunities to invest your HSA dollars or save money on prescription drugs.

Change Alert Preferences

You can change your alert preferences from the communication settings page. Click the drop-down next to your name and select *Communication Settings*.

- For each alert, choose whether to 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 text alerts.



Assigned Notifications

i 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.

i 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	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
This communication is sent when your account balance falls below \$50.00.				
Account Balance Statement	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
This communication is sent on a Monthly basis.				
Card Mailed	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
This communication is sent when your card has been mailed.				
Enrollee Welcome Email	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
This communication is sent when your account is created.				

SAVE

Email Address

Phone Registration Status

View Account Balance(s)

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

- To open, click MENU > My Accounts > Benefit Account Summary
- Each of your accounts displays in its own box with the account type listed on top.
- The Account Summary section breaks down funds information.
- The Deadlines section displays important plan dates including last day for spending and last day to submit claims.

FSA
[ABOUT THIS ACCOUNT](#)

Account Balance

Balance \$2,009.70
Spent \$2,445.05

Account Summary

Other/Incentive Deposits	\$2,000.00
- Spent	\$2,445.05
= Balance	\$2,009.70

Quick links to account details, transactions, claim submission, and connected cash.

Your annual election showing how much was spent and how much is available to spend.

Health Reimbursement Account (01/01/2021-12/31/2021)

Account Balance

Balance \$2,000.00
Spent \$100.00

Account Summary

Annual Election	\$2,100.00
Allocation to date	\$2,000.00
- Spent	\$100.00
= Balance	\$2,000.00

Deadlines

Plan Start Date	Jan 1, 2021
Plan End Date	Dec 31, 2021
Last Day for Spending	Mar 18, 2022
Last Day to Submit Claims	Mar 31, 2022

Important dates and deadlines are displayed under your account summary information.

Submit a Claim

You can add claims for immediate or future reimbursement depending on your plan type and the plans you are enrolled in.

- To submit an HSA claim for immediate reimbursement click MENU > Claims > Add claim for immediate reimbursement
- To submit a claim for future reimbursement, click MENU > Claims > Add claim for future reimbursement
- To expedite processing of future reimbursement claims, add documentation by uploading or using the DRAG & DROP feature.

Add Payment

IMPORTANT: Payments are deducted from my HSA account on the mail date and will arrive at the payee up to 7-10 business days later, depending upon mail time. Whenever possible, your payment may be converted from a check to an electronic form of payment accepted by your provider.

Withdrawal Account * Health Savings Account

Your Payment Request

PaySomeoneElse PayMe

How would you like the funds to be sent to you?

Deposit to my account on file Send me a check

Amount *

Payment Preferences

Once Weekly Monthly

Send out Payments on *

Description

I understand that payments must be for qualified expenses, and I have full responsibility to maintain documentation that substantiates my bill payment requests are for qualified expenses. Payments or distributions from my HSA account may be sent to and held by an external payment processor to be processed. Payments to providers may be converted from a check to an electronic form of payment.

CANCEL
SUBMIT

*** - Required Field**

Service Start Date *

Service End Date *

Claimant * Smith, Caitlin

Provider

Description

Amount Your Provider Charged or Insurance Allowed Amount must be greater than 0.00.

Amount Your Provider Charged

Insurance Allowed Amount

Amount Covered by Insurance

Amount You Paid Out of Pocket

Comments

My Responsibility

Reimbursed from My Accounts

My Remaining Responsibility

Upload Receipt BROWSE

DRAG & DROP
your receipts here

CANCEL
SUBMIT



***NOTE:** The plan or plans you are enrolled in will impact the menu choices available to you. For example, if you are enrolled in a Transit account, but not an HSA, you will be able to submit “future reimbursements” but not immediate HSA claims.

Submit an Expense

The Add Expense Wizard walks you through a series of questions to help you submit your expense correctly. You can use this wizard for reimbursement requests or to pay a provider for an eligible cost.

- To open the expense wizard click MENU > *Claims* > *Add New Expense*
- Payments can be made directly to your provider or yourself.

Who do you want to pay?

IMPORTANT: Payments are deducted from my HSA account on the mail date and will arrive at the payee up to 7-10 business days later, depending upon mail time. Whenever possible, your payment may be converted from a check to an electronic form of payment accepted by your provider.

PAY THE PROVIDER **PAY MYSELF**

Select the provider you wish to pay.*

Select Provider ▾

Account Number* Type here...

Who do you want to pay?

IMPORTANT: Payments are deducted from my HSA account on the mail date and will arrive at the payee up to 7-10 business days later, depending upon mail time. Whenever possible, your payment may be converted from a check to an electronic form of payment accepted by your provider.

PAY THE PROVIDER **PAY MYSELF**

Select an option to collect your funds*

DEPOSIT INTO ACCOUNT

MAIL ME A CHECK

[EDIT REIMBURSEMENT METHOD DETAILS](#)

View Claims and Expenses

You can view your claims and transactions on the Account Activity screen. Use the buttons on top to filter transactions by year, plan, status and more!

- To open, click *MENU > Claims > Claim Activity*

Which claims do you want to see? Select activities ▼

Action Needed
 Approved/Paid/Submitted
 Denied

SEARCH FOR CLAIMS

Approved/Paid/Submitted

<p>(\$400.00) Paid Purchase</p>	<p>Claim Date of Service: Jan 17, 2022 Date of Transaction: Apr 6, 2022</p>
<p>(\$100.00) Paid PRIVATE</p>	<p>Claim Date of Service: Jan 3, 2022 Date of Transaction: Apr 6, 2022</p>

- Click on the individual transaction to view its details and act, 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 a document for review.

	Approved	HSA BILLPAY - Paid	HSA Bill Pay	Aug 3, 2022	\$500.00	AT1
Transaction Detail			Payment Details			
Transaction Date	Aug 3, 2022		Total	\$500.00		
Account	AT1		Payee	1		
IRS Reporting Category	Normal Distribution		Next Payment Date	Aug 3, 2022		