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

CONTENTS

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.

*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.

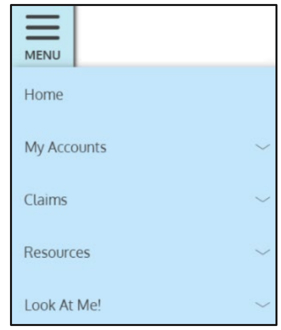
Profile Drop-Down Menu
Click the drop-down arrow next to your name to view:

- 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.

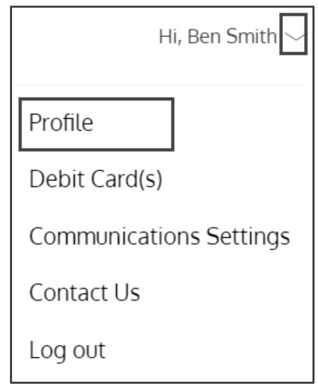
Main Menu



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

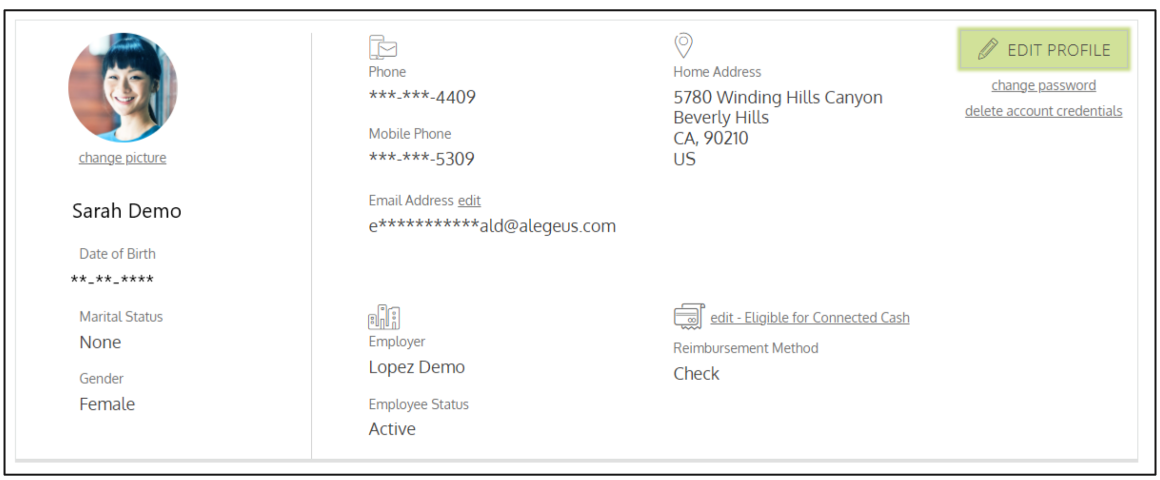


Click the drop-down arrow next to your name and select *Profile*.

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

From the Profile screen you can view and edit your:

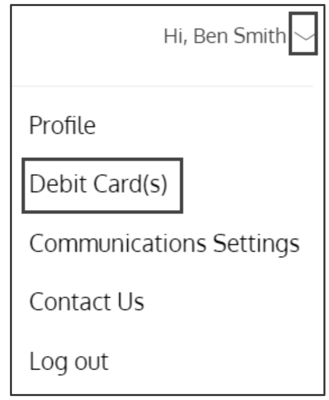
- Phone number and address
- Reimbursement method
- Dependent information
- And more!



***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.

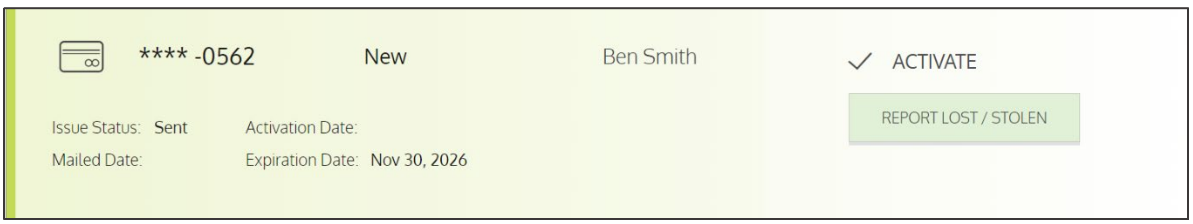


To view your benefit account debit cards, click the drop-down next to your name and select debit cards.

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* 

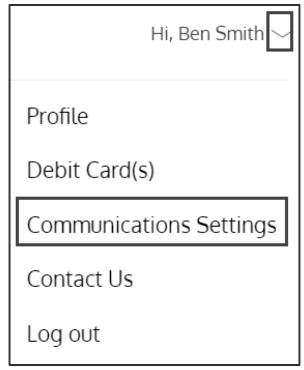
- The number in red alerts you of unread notifications.
- Click on an individual message to see the full text.

Messages provide important information about your account(s). Check your notifications for crucial messages.

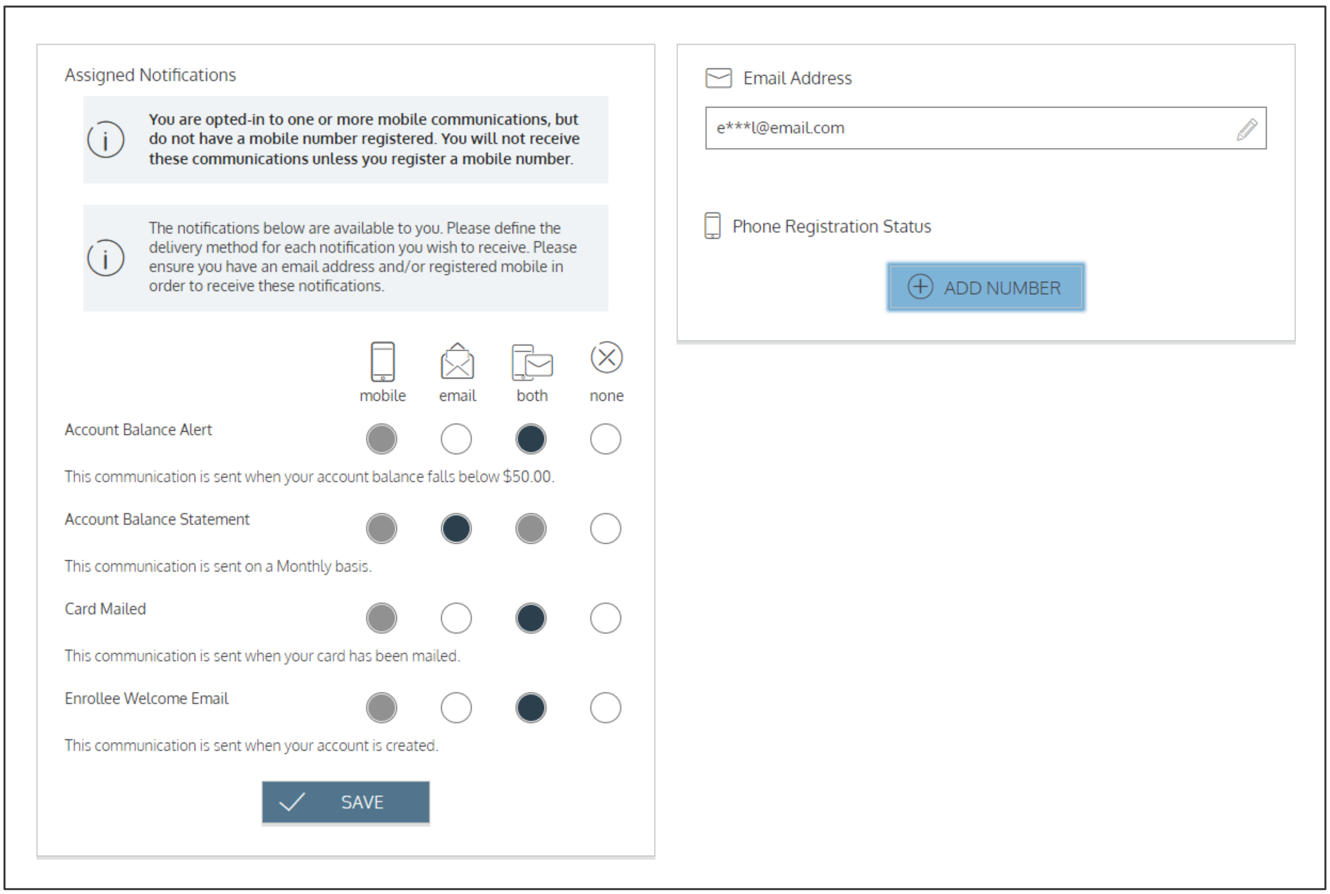
Opportunities are tips and tricks that can help you maximize your benefit accounts, such as suggesting to switch to direct deposit reimbursements or electronic-only statement delivery. You may also be presented with opportunities to invest your HSA dollars or save money on prescription drugs.

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.*



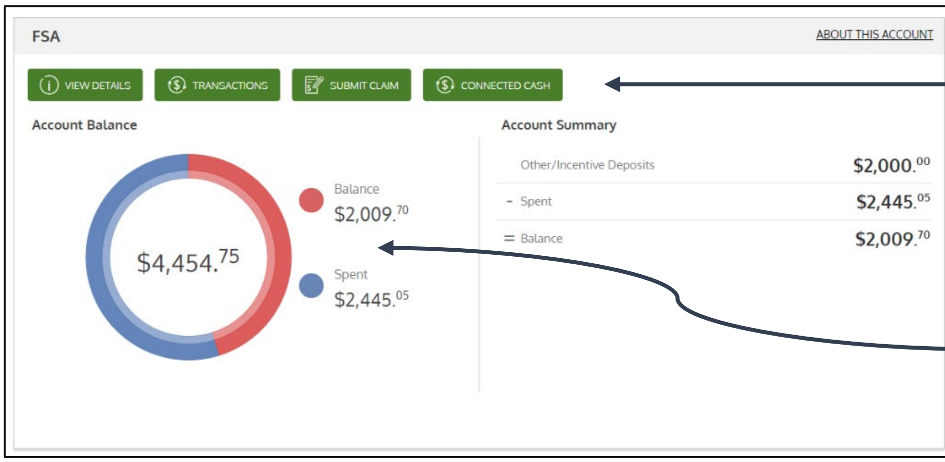
- For each alert, choose whether to receive mobile, email, both, or no notifications.
- Click *Save* when you are done editing your preferences.
- You can also update your email address and register your mobile phone for text alerts.



View Account Balance(s)

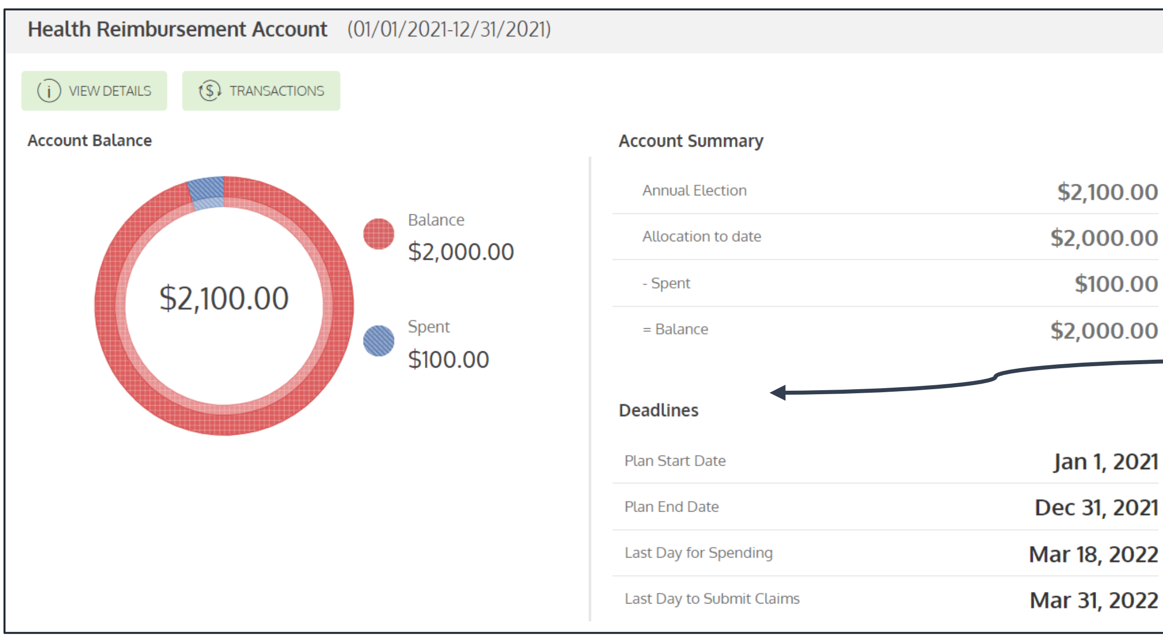
The benefit account summary page provides a quick view of your account balance(s).

- 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.



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.

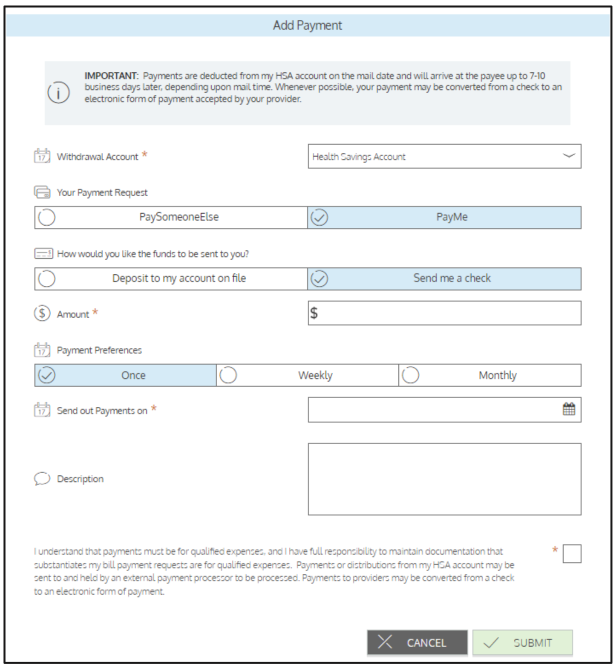


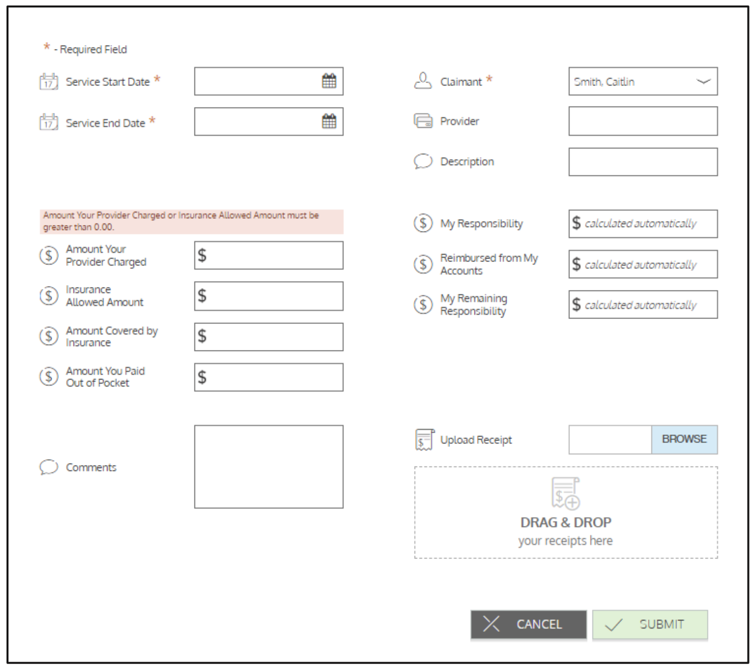
Important dates and deadlines are displayed under your account summary information.

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.



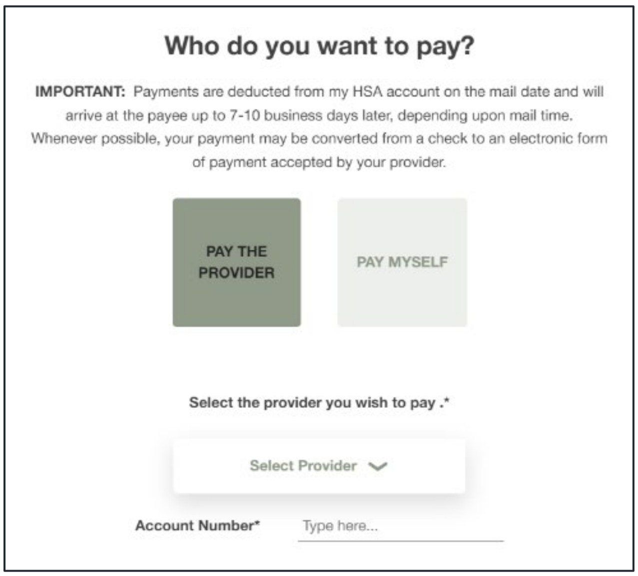


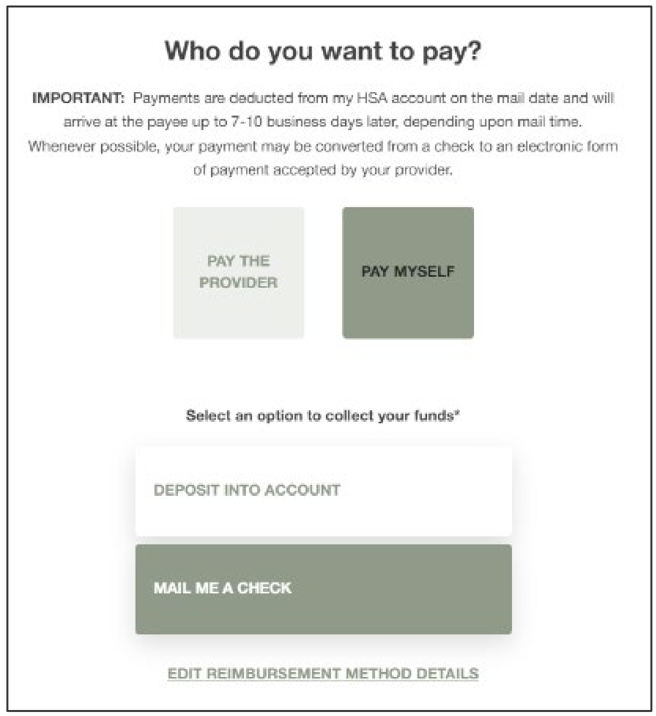
***NOTE**: The plan or plans you are enrolled in will impact the menu choices available to you. For example, if you are enrolled in a Transit account, but not an HSA, you will be able to submit “future reimbursements” but not immediate HSA claims.

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.





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*

- 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.