

Preferred

ADMINISTRATORS



Flexible Spending Account (FSA) Member Portal Guide

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

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Getting started

The FSA Member Portal can be accessed by visiting the following URL:

- <https://preferredadmin.wealthcareportal.com>

First Time New Registration

- **Step 1:** If this is your first time accessing FSA Member Portal, click the *register* button atop the right corner of the home screen.
- **Step 2:** Complete the registration form (as shown in the image on the lower right).
 - Choose a username & password
 - Enter your demographic information
 - Enter our Employee ID: Enter your Social Security Number
 - Enter your Employer ID:
 - UMC Employer ID: EPF001
 - EPCH Employer ID: EPF002

If you already have a benefit debit card, the debit card number can be used in place of the *employer ID* in the *registration ID* field.

Before clicking *register*, be sure to view and accept the terms of use.

- **Step 3:** Click *register*. The process may take a few seconds. Do not click your browser's back button or refresh the page.

Secure authentication

The next phase of registration involves setting up your secure authentication. This crucial step helps ensure your account is secure and private.

After the registration form is successfully completed, you will be prompted to complete the secure authentication setup process.

- **Step 1.** Select your security questions. From the list, please select four security questions and provide your answers. These questions will be randomly asked during subsequent logins to ensure security. When finished, click *next*.

- **Step 2.** Verify your email address.
On the next page, you will be prompted to verify your email. Click *next*.

Register - Secure Authentication

STEP 1 > STEP 2 > **STEP 3** > STEP 4

First Name: Test

Last Name: Account

Confirm Email *

i The email address entered is used for security encryption only. It is not used for solicitation purposes.

- **Step 3.** Submit setup information. On the next page, you'll be asked to verify the information you entered during the secure authentication process. After you've reviewed and confirmed the accuracy of this information, click *submit setup information*.

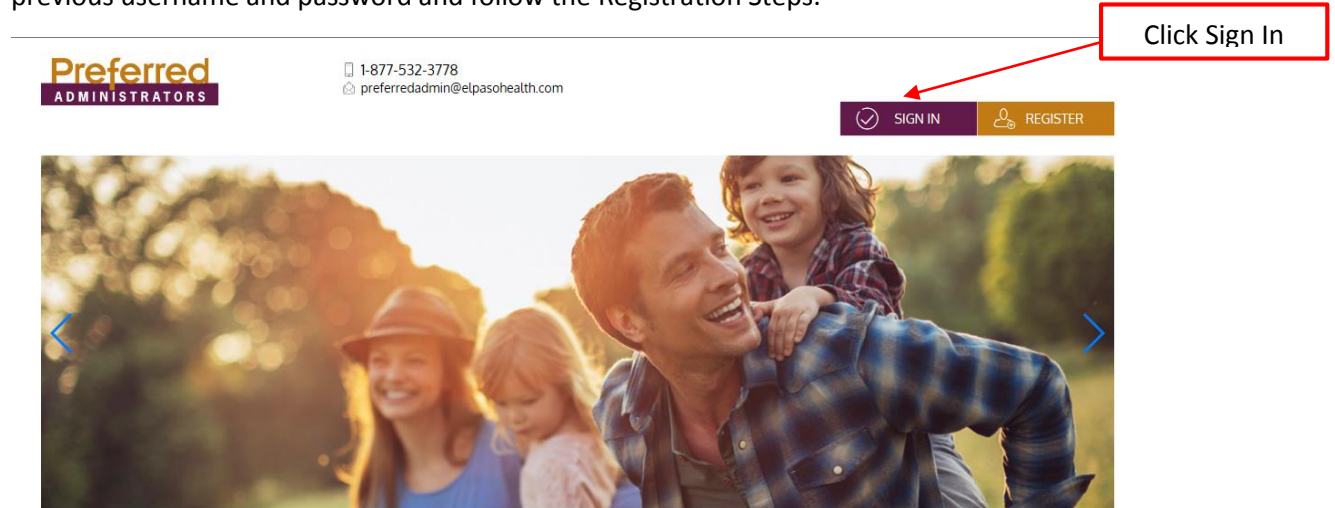
A confirmation page will display the successful completion of your registration.

Your first login

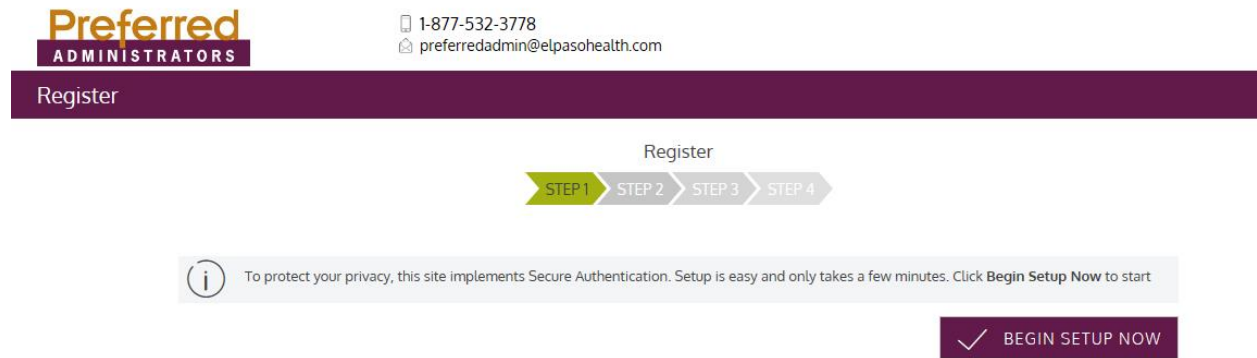
Once registered, you will be able to enter your username, answer security questions, and enter your password on all subsequent login attempts.

Existing Users


FSA participant portal users with an existing username and password will be able to sign in with their previous username and password and follow the Registration Steps.



- **Step 1.** The next phase of registration involves setting up your secure authentication. This crucial step helps ensure your account is secure and private.



- **Step 2.** After the registration successfully completed, you will be prompted to complete the secure authentication setup process.



1-877-532-3778
preferredadmin@elpasohealth.com

Register

Register - Secure Authentication

STEP 1 STEP 2 STEP 3 STEP 4

Select Question 1 *

Which high school did you attend?

Type your answer here

Select Question 2 *


What is the first name of your eldest nephew/niece?

Type your answer here


Select Question 3 *

What is your grandfather's middle name (your mother'

Type your answer here

 Please use the following list to choose four questions which are relevant to you and then enter answers to those questions. These questions may be asked during the sign on process to confirm that an authorized individual can access account information online.

- **Step 3.** Verify your email address. On the next page, you will be prompted to verify your email. Click *next*.



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preferredadmin@elpasohealth.com

Register

Register - Secure Authentication

STEP 1
STEP 2
STEP 3
STEP 4

First Name	Margarita
Last Name	Guerra
Confirm Email *	mguerra0927@yahoo.com

The email address entered is used for security encryption only. It is not used for solicitation purposes.

✓ NEXT

✗ CANCEL

- **Step 4.** Verify your information below before submitting.

Register - Secure Authentication

STEP 1
STEP 2
STEP 3
STEP 4

Your setup information has not yet been submitted. Please verify your information below before clicking **Submit**. If you need to make a change before submitting, click the appropriate **Edit Info** link

Questions and Answers

Question 1

Which high school did you attend?

EDIT INFO

Question 2

What is the first name of your eldest nephew/niece?

Question 3

What is your grandfather's middle name (your mother's father)?

Question 4

In which city was your grandfather born (father's father)?

- You should receive a Success page if you successfully registered.



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Register



Success

You have successfully completed the registration process

- The next time you sign on to access your account information you will be asked to provide your **username** and **password**
- To protect your personal information you may occasionally be required to complete additional authentication

DONE

Checking your account balance(s)

Navigate to the *benefit account summary* page to access a quick view of your account balance(s). Each of your accounts displays in its own box, and provides at-a-glance details regarding your balance, funds spent, and important dates.

The screenshot displays the 'Flexible Spending Account' page for the period 01/01/2016-12/31/2016. It features a donut chart for 'Account Balance' and an 'Account Summary' table. Callout boxes provide context for various elements.

Account Balance	
Available Balance	\$589. ⁴⁹
Spent	\$866. ⁵¹
Total Available	\$1,456.⁰⁰

Account Summary	
Annual Election	\$1,456. ⁰⁰
Payroll Deposits YTD	\$1,568. ⁹⁹
Spent	(\$866. ⁵¹)
Balance	\$589.⁴⁹

Deadlines	
Plan Start	Jan 1, 2016
Plan End	Dec 31, 2016
Last Day to Submit Claims	Mar 31, 2017
Last Day for Spending	Dec 31, 2016

At the bottom, there are three buttons: 'VIEW DETAILS', 'TRANSACTIONS', and 'SUBMIT CLAIM'.

Callout 1: Displays how much of your annual election has been spent, and how much is still available.

Callout 2: Important dates, such as the last day to spend funds, and the last day claims can be submitted.

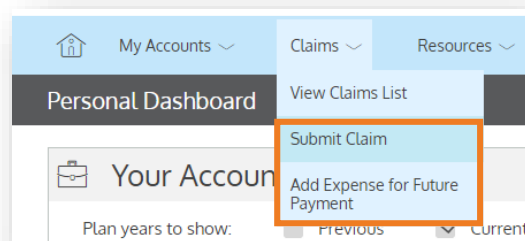
Callout 3: Links to additional account details, transactions, and claim submission forms.

Submitting expenses and filing claims

FSA Member Portal allows you to enter new claims and expenses, as well as view and edit pending claims. If you have receipts or documentation to substantiate your claim, you can attach these to expedite the reimbursement process.

What is the difference between a claim and expense?

- **Claim.** Claims are simply reimbursement requests submitted for costs incurred when receiving eligible services, products, or procedures.
- **Expense.** Expenses are used to track & manage your medical, dental, vision, prescription, and other potentially eligible expenses. Expenses can be manually entered by you. Once entered, expenses can be submitted for reimbursement (just like a claim). Expenses can be submitted now or later.



Submitting a claim

To enter a claim and request reimbursement, navigate to the *add claim* page (by clicking *submit claim* or via the menu bar) and complete the form. Be sure to upload a receipt image if you have one. You can click *browse* to navigate to the file, or you can drag and drop from your computer. Click *submit* to send the request for processing.

Add Claim

* - Required Field

Claimant: Steve Sample

Reimbursement Method: Card

Service Start Date: select date

Service End Date: select date

Service Type: -- Select One --

Claim Amount: \$ 0.00

Would you like to submit this as a recurring payment?

Yes No

Provider Name: []

Comments: []

Upload Receipt: [] **BROWSE**

DRAG & DROP
your receipts here

Send payment directly to your service provider. When entering a claim, you can choose to have the reimbursement funds sent directly to you, or you can have payment sent directly to your provider (on your behalf).

If you pay a provider, choose your provider name from the dropdown menu. If you don't see your provider listed, select *add new provider record* to add your provider

Pay provider? *

Yes No

Provider Name: Lahey Clinic

Viewing claims and expenses

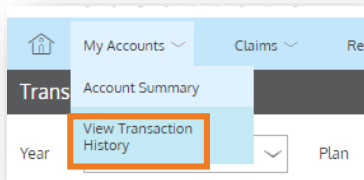
Once entered, claims and expenses can be viewed on the *claims list* page. From here, you can view claim status, attach receipts, and request reimbursement for eligible expenses.

Action Needed		
\$100.00	Eligible for Reimbursement	Claim Date of Service: Oct 26, 2016 REQUEST REIMBURSEMENT
Approved/Paid/Submitted		
(\$32.99)	Paid	Claim Date of Service: Nov 6, 2016 Date of Transaction: Nov 9, 2016
(\$43.99)	Paid	Claim Date of Service: Nov 3, 2016 Date of Transaction: Nov 9, 2016
(\$54.00)	Paid	Claim Date of Service: Nov 9, 2016 Date of Transaction: Nov 9, 2016
(\$8.00)	Paid	Claim Date of Service: Nov 7, 2016 Date of Transaction: Nov 9, 2016
\$100.00	Submitted	Claim Date of Service: Oct 26, 2016 ADD RECEIPT
<a>< Page 1 of 1 <a>>		
Denied		
\$34.00	Denied	Claim Date of Service: Nov 9, 2016 Date of Transaction: Nov 9, 2016

Resolving pending debit card transactions

If you swipe your debit card for eligible products or services, you may be required to submit a receipt or other documentation before the debit card transaction can be approved. To aid in resolving pending debit card transactions, you can take the following action:

- **Step 1.** Navigate to the *transactions* page.
- **Step 2.** Located the pending transaction (using the search filters)
- **Step 3.** Click to expand the transaction, and click *add receipt* to attach your supporting documentation to the transaction.



We will review the documentation you've submitted and update the transaction accordingly.

Year: 2017 Plan: Dependent Care FSA (Curr) Type: All

Which transactions do you want to see? Select here

Approved/Posted Pending/Processing Denied

SEARCH FOR TRANSACTIONS

(\$40.00)	Dependent Care FSA Pending	Card	Feb 27, 2017	
Date Of Service	Feb 27, 2017		RECEIPTS	ADD RECEIPT
Description	DR. SMITH		No receipts to display.	PRINT
Claimant	NewApp Two			
Account Type	DCA			
Plan Start Date	Jan 1, 2017			
Plan End Date	Dec 31, 2017			
Merchant Name	DR. SMITH			

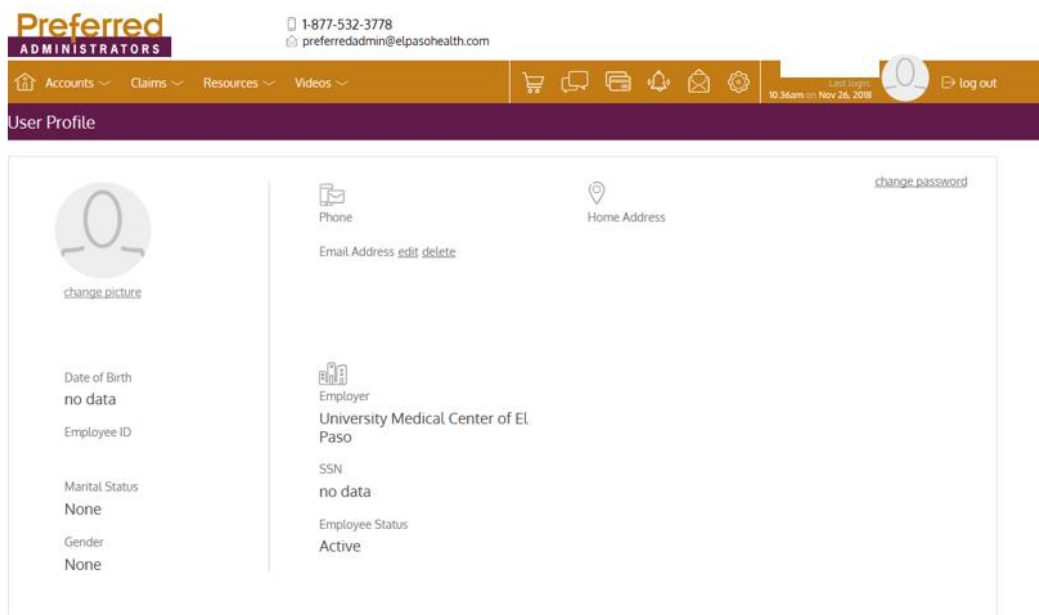
Updating your user profile

To access and edit your user profile, click the username hyperlink on the right side of the navigation bar. From this page, you can:

1. Update your e-mail address
2. Change your password



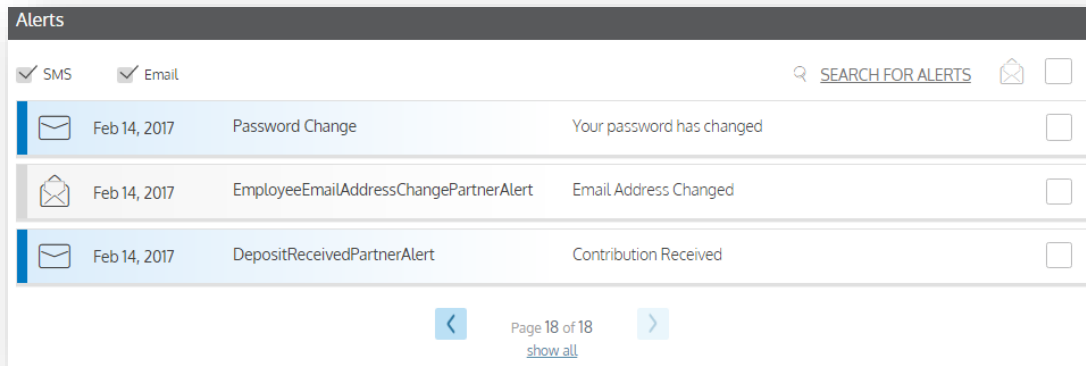
The image below shows where each item in the list above is located.



Managing alerts & messages

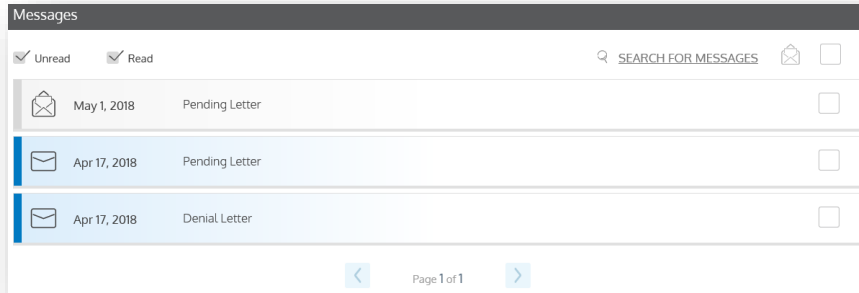
The bell icon in the navigation bar indicates when you have unread alerts awaiting your review. Depending on your communication preferences and your group's setup, these alerts could be anything from confirmation of an email address or password change, to notification that a claim you submitted has been received, to an alert that a card transaction was denied, to a wide variety of other communication types.

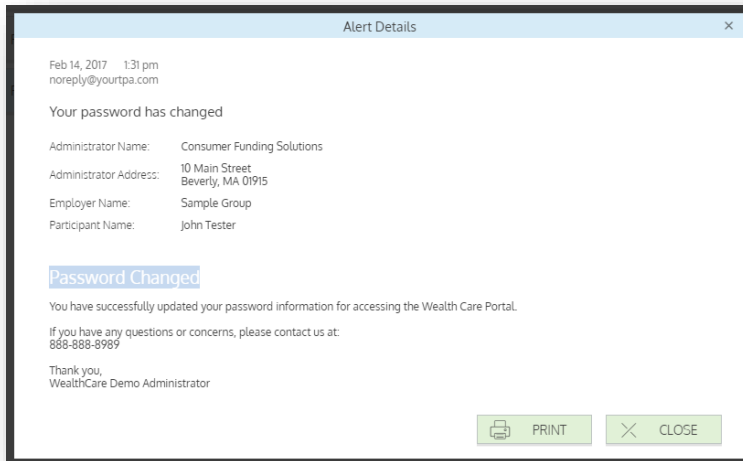




Click on an individual message to see the full text:

The envelope icon in the navigation bar indicates when you have unread messages awaiting review. These messages include copies of manual claim letters, receipt notification letters, and reimbursement letters. Similar to alerts, you can simply click any message item to see the letter text in full.





Changing your alert preferences and updating your phone number

You can change whether you receive certain alert types, as well as how you receive them from the *communication settings* page. This page can be accessed by clicking the sprocket symbol in the navigation bar.

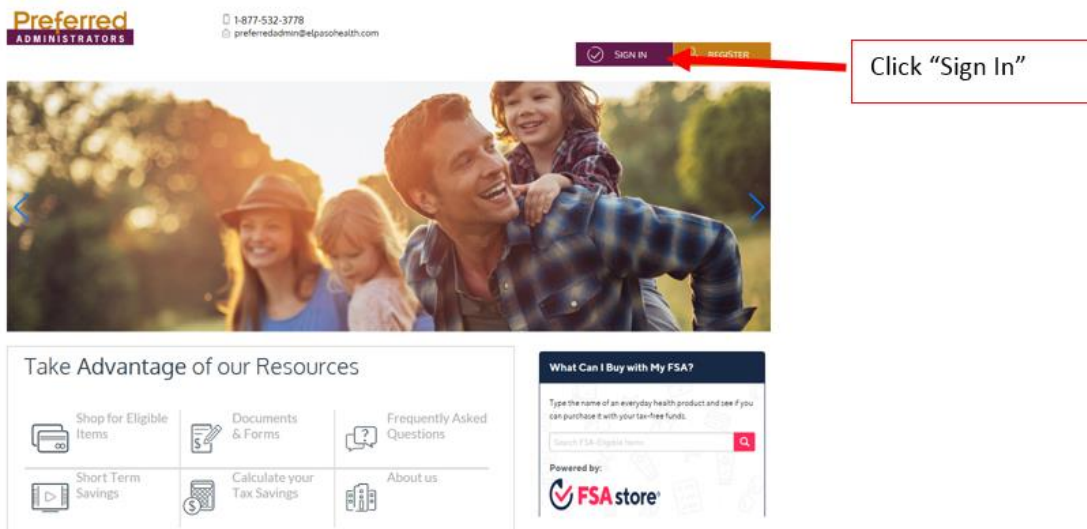


You may choose, for each alert type, whether you receive it via mobile, email, both, or neither. Click *save* when you are done editing your preferences. You can also use this page to update your email address, and to register your mobile phone for SMS text alerts.

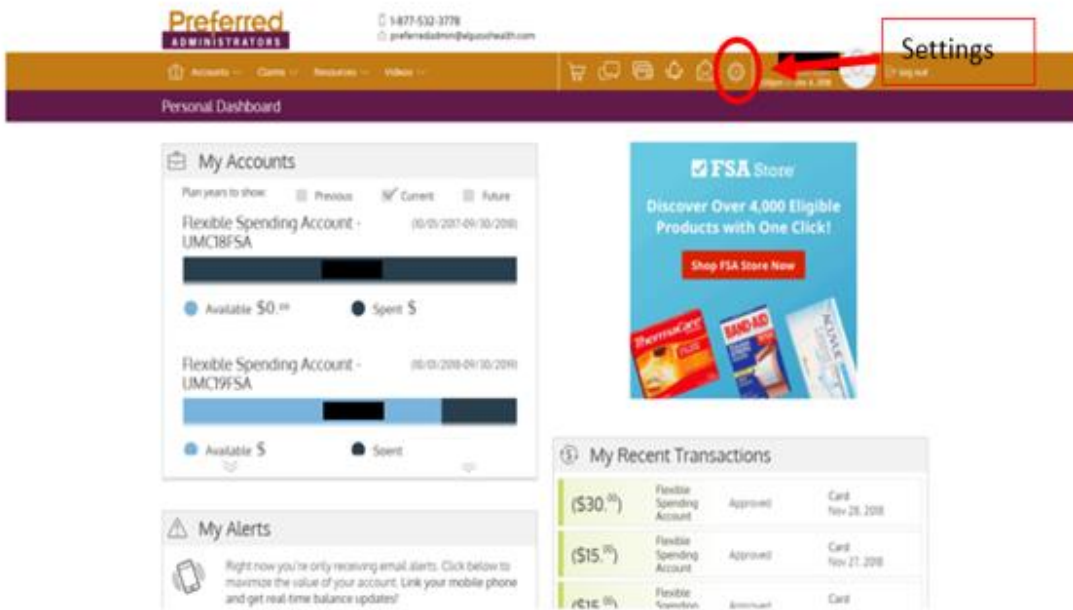
Manage your account from your mobile phone

Step 1: Login to your Preferred Administrators online account access portal

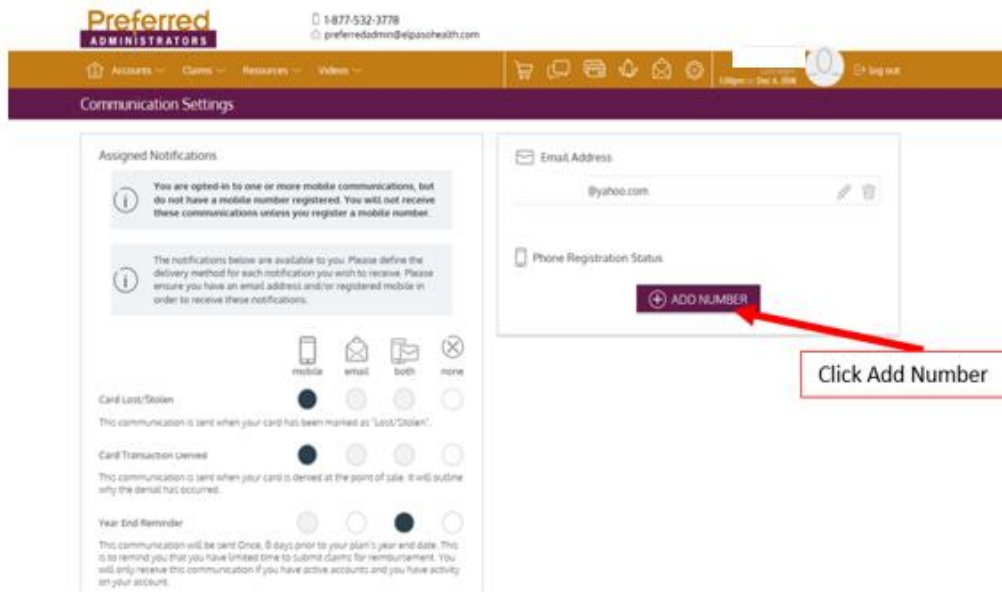
<https://preferredadmin.wealthcareportal.com>



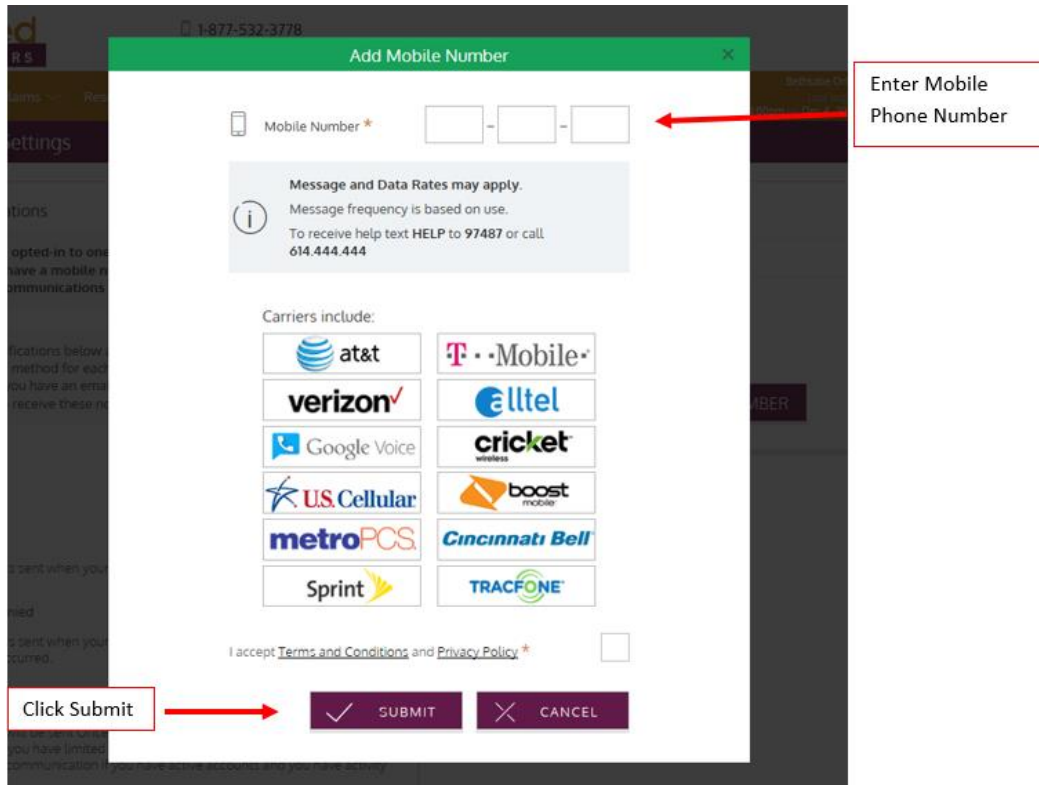
Step 2: On the home page, Navigate to the “Settings Icon” and click on it to go to the next page.



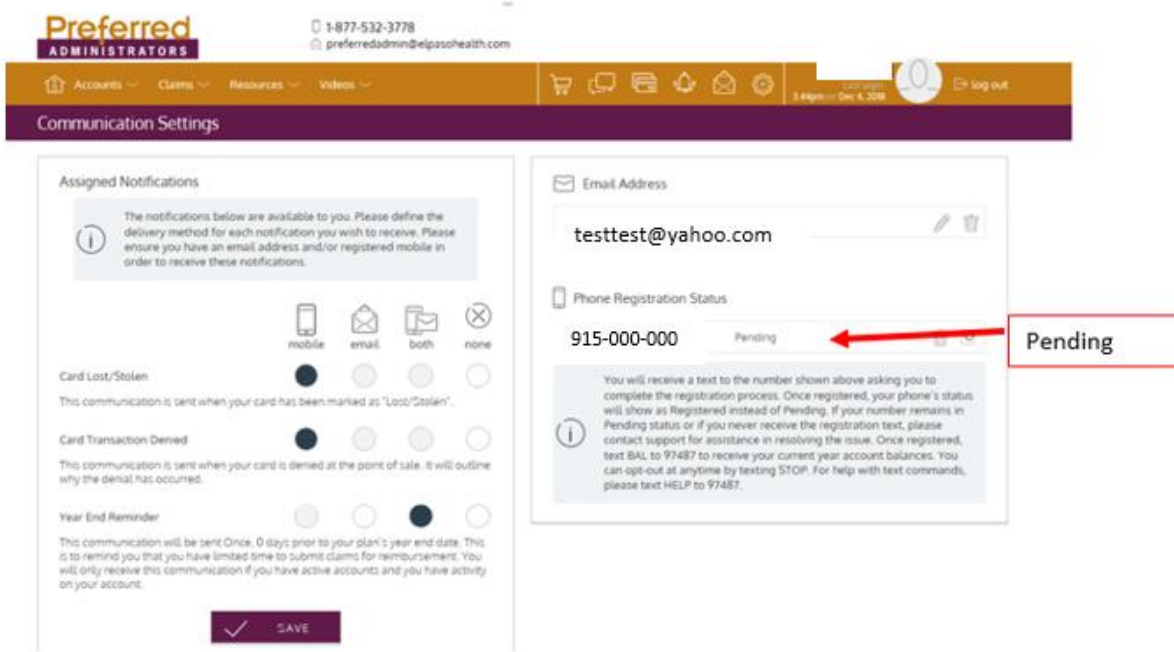
Step 3: To enter your “Mobile Phone Number” select the box “Add Number”.



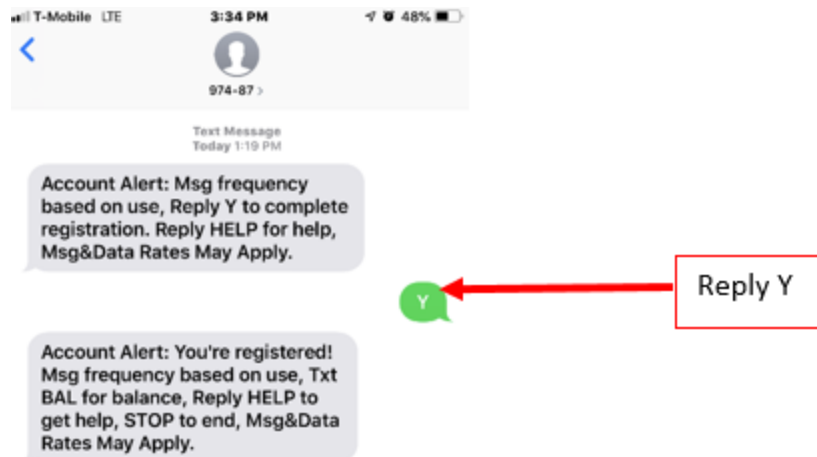
Step 4: The Add mobile phone number page will display, enter you mobile number and accepted the “Terms and Conditions” and click submit.



Step 5: It will redirect you back to the previous page and the mobile phone number will display a status of “Pending” until you complete the registration process using your mobile phone number.



Step 6: The following text message will be sent to the mobile device.



Step 7: To complete the registration steps you must reply to the text message with a “Y”.

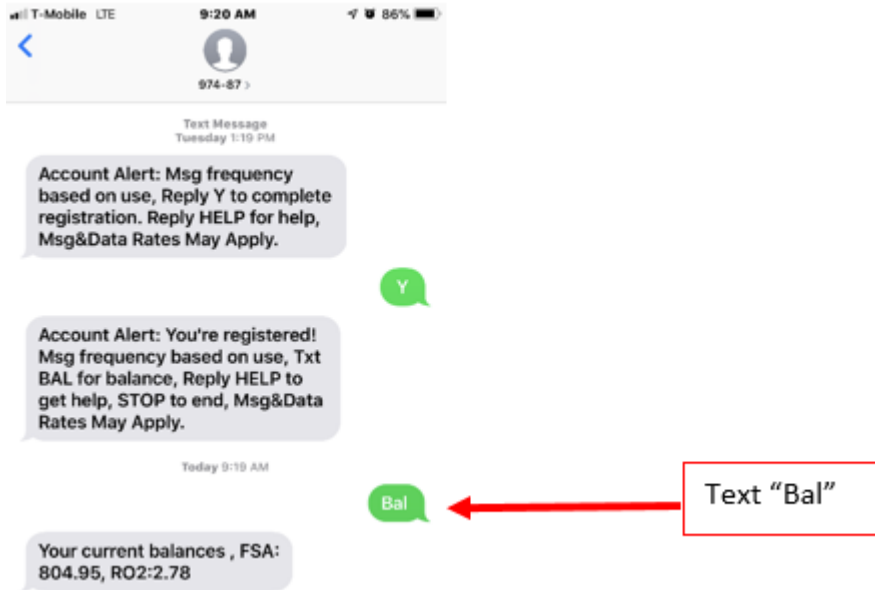
You will next receive a text message which confirms the registration of the mobile device.

Step 8: Once you have completed all of the registration steps, the web portal status for the mobile number will change to “Registered”.

The screenshot shows the 'Communication Settings' page in the Preferred Administrators Member Portal. The page is divided into two main sections. On the left, under 'Assigned Notifications', there are three notification types: 'Card Lost/Stolen', 'Card Transaction Denied', and 'Year End Reminder'. Each notification type has four radio button options for delivery: 'mobile', 'email', 'both', and 'none'. The 'mobile' option is selected for all three notification types. A 'SAVE' button is at the bottom of this section. On the right, under 'Email Address', the address 'testtest@yahoo.com' is displayed. Below that, the 'Phone Registration Status' is shown as 'Registered' for the number '915-000-0000'. A red arrow points from a red box labeled 'Registered' to the status text. A small information icon is present next to the phone status section.

Step 9: Text BAL to receive your current balance

To request FSA Balance, text Bal to 97487 and to stop receiving mobile alerts, text STOP to 97487.



10. To stop receiving mobile alerts, text STOP to 97487.

11. To change or unregister your Mobile Number click :Unresgister”

