

## Online Member Guide

A member's guide to the  
BenefitWallet portal

# Table of contents

[Home](#)

What can I find on the home page?	3
How do I access recent account activity?	4
How do I make payments and reimbursements?	5
How do I make an electronic contribution?	6
How do I set up HSA alerts?	7
How do I access my profile?	8
How do I order checks?	9
How do I access HSA statements?	10
How do I reorder a debit card?	11
Where is my HSA Filing Cabinet?	12
How do I access forms and educational materials?	13
Additional information	14

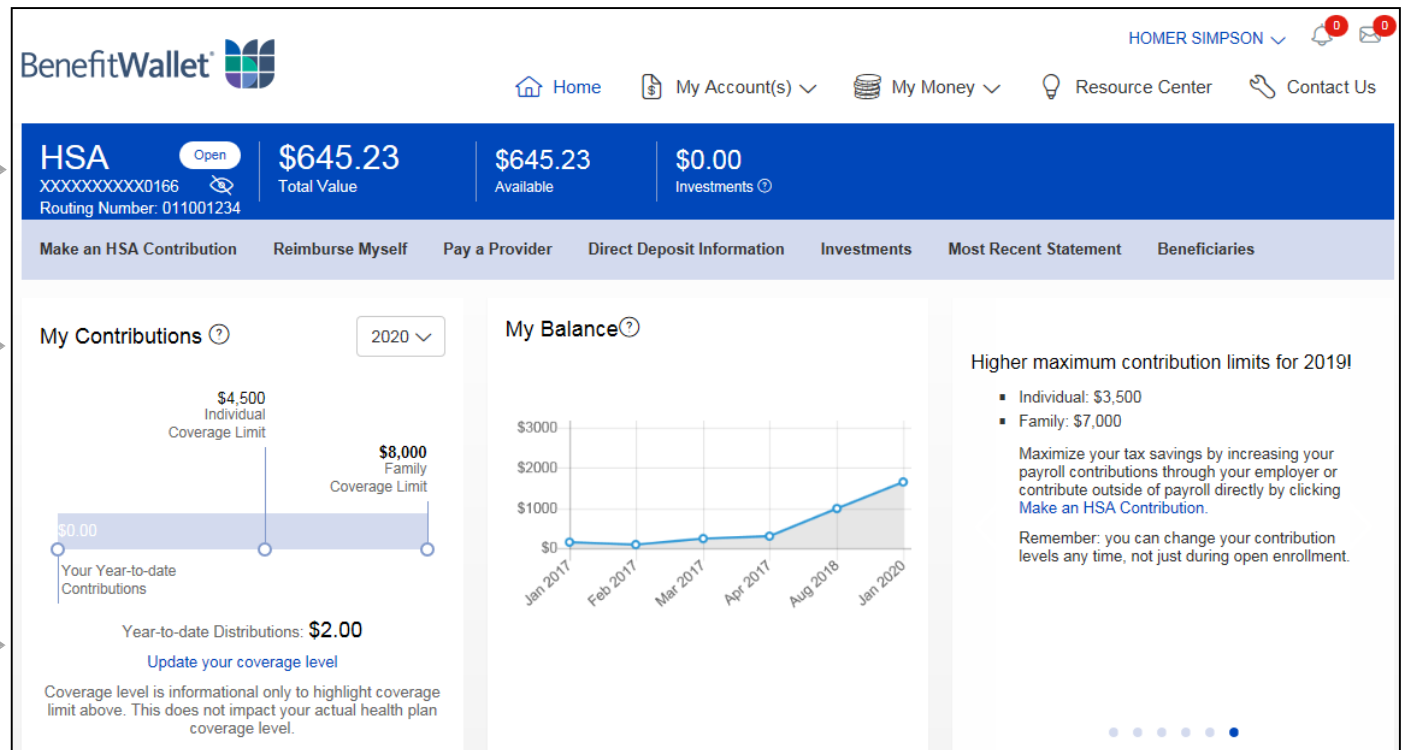
# What can I find on the home page?

Home

Account  
Balance

Important  
graphs

Transactions



# How do I access recent account activity

[Home](#)

View recent account activity directly from the bottom of the home page.

<a href="#">Transactions</a> My Pending Transactions   My Processed Contributions   My Processed Payments   Transactions Held					
Date	Type	Description	Withdrawal	Deposit	Tax Year
12/31/2019	INTEREST POSTED	INTEREST POSTED THROUGH 12/31/2019		\$0.05	2019
11/29/2019	INTEREST POSTED	INTEREST POSTED THROUGH 11/30/2019		\$0.05	2019
11/13/2019	DEBIT CARD PURCHASE	WEIS MARKETS -TEST WILLIAMSPORT PA	\$2.00		2019
11/12/2019	DEBIT CARD PURCHASE	WEIS MARKETS -TEST WILLIAMSPORT PA	\$5.00		2019
11/08/2019	DEBIT CARD PURCHASE	WEIS MARKETS -TEST WILLIAMSPORT PA	\$5.00		2019
11/06/2019	DEBIT CARD PURCHASE	WEIS MARKETS -TEST WILLIAMSPORT PA	\$10.00		2019
11/05/2019	DEBIT CARD PURCHASE	WEIS MARKETS -TEST WILLIAMSPORT PA	\$1.00		2019
<a href="#">More transactions</a>					

# How do I make payments and reimbursements?

Home

Select  
*Reimburse  
Myself*

or

*Pay a  
Provider*  
from the  
quick links

The screenshot shows the BenefitWallet HSA dashboard for user HOMER SIMPSON. The top navigation bar includes links for Home, My Account(s), My Money, Resource Center, and Contact Us. The main header displays the HSA account details: HSA (XXXXXXX0166, Routing Number: 011001234), Total Value (\$645.23), Available (\$645.23), and Investments (\$0.00). Below the header, a row of quick links is shown, with 'Reimburse Myself' highlighted by a red box. The dashboard also features sections for 'My Contributions' (showing a year-to-date balance of \$0.00 and coverage limits of \$4,500 for individual and \$8,000 for family), 'My Balance' (a line graph showing the balance over time from Jan 2017 to Jan 2020), and 'HSA Beneficiaries' (a notice that no beneficiary has been named and an 'Act Now' button).

BenefitWallet

HOMER SIMPSON

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

HSA XXXXXXXXXX0166 Routing Number: 011001234

Open \$645.23 Total Value \$645.23 Available \$0.00 Investments

Make an HSA Contribution **Reimburse Myself** Pay a Provider Direct Deposit Information Investments Most Recent Statement Beneficiaries

My Contributions 2020

\$4,500 Individual Coverage Limit \$8,000 Family Coverage Limit

\$0.00 Your Year-to-date Contributions

Year-to-date Distributions: \$2.00

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

\$3000 \$2000 \$1000 \$0

Jan 2017 Feb 2017 Mar 2017 Apr 2017 Aug 2018 Jan 2020

HSA Beneficiaries

According to our records, you have not named a beneficiary for your HSA. Save yourself potential tax consequences by naming your beneficiary today.

Act Now

# How do I make an electronic contribution?

Home

Select *Make an HSA Contribution* from the quick links

The screenshot shows the BenefitWallet HSA account dashboard for Homer Simpson. The top navigation bar includes links for Home, My Account(s), My Money, Resource Center, and Contact Us. The main header displays the HSA account details: HSA (XXXXXXX0166), Routing Number: 011001234, Total Value: \$645.23, Available: \$645.23, and Investments: \$0.00. A red box highlights the 'Make an HSA Contribution' link in the quick links section. Below this, the 'My Contributions' section shows a bar chart for 2020 with a year-to-date total of \$0.00 and a year-to-date distribution of \$2.00. The 'My Balance' section shows a line chart of the account balance over time, starting at \$0 in Jan 2017 and rising to approximately \$1,800 by Jan 2020. The 'HSA Beneficiaries' section includes a photo of a family and a message stating that no beneficiary has been named, with an 'Act Now' button.

**BenefitWallet**

HOMER SIMPSON

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

**HSA** [Open](#)  
XXXXXXX0166  
Routing Number: 011001234

**\$645.23** Total Value  
**\$645.23** Available  
**\$0.00** Investments

[Make an HSA Contribution](#) [Reimburse Myself](#) [Pay a Provider](#) [Direct Deposit Information](#) [Investments](#) [Most Recent Statement](#) [Beneficiaries](#)

**My Contributions** 2020

\$4,500 Individual Coverage Limit  
\$8,000 Family Coverage Limit

\$0.00  
Your Year-to-date Contributions

Year-to-date Distributions: **\$2.00**  
[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**

\$3000  
\$2000  
\$1000  
\$0

Jan 2017 Feb 2017 Mar 2017 Apr 2017 Aug 2018 Jan 2020

**HSA Beneficiaries**

According to our records, you have not named a beneficiary for your HSA. Save yourself potential tax consequences by naming your beneficiary today.

[Act Now](#)

# How do I set up HSA alerts?

Home

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

The screenshot shows the BenefitWallet HSA dashboard for user HOMER SIMPSON. The top navigation bar includes links for Home, My Account(s), My Money, Resource Center, and Contact Us. The main header displays the HSA account details: Total Value of \$645.23, Available balance of \$645.23, and Investments of \$0.00. Below this, there are tabs for various actions: Make an HSA Contribution, Reimburse Myself, Pay a Provider, Direct Deposit Information, Investments, Most Recent Statement, and Beneficiaries.

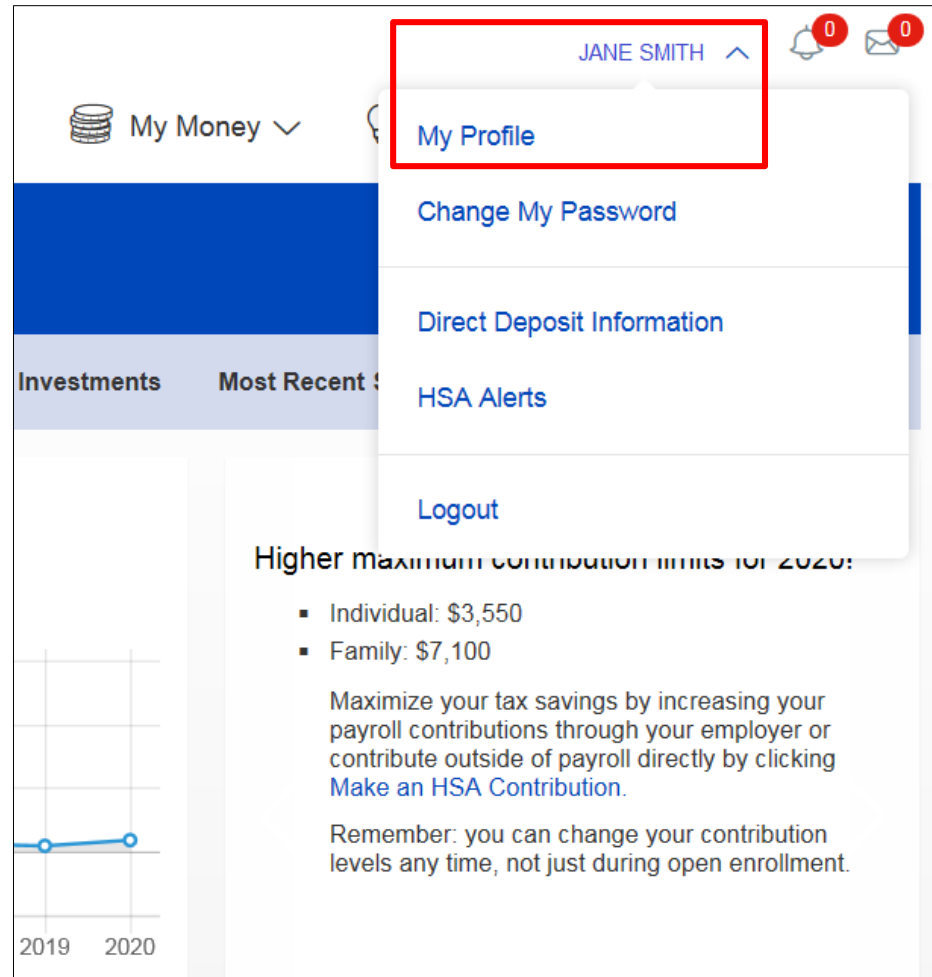
The dashboard is divided into two main sections. The left section, titled "My Contributions", shows a bar chart for the year 2020. The chart indicates a year-to-date contribution of \$0.00 and a year-to-date distribution of \$2.00. It also displays coverage limits: \$4,500 for Individual and \$8,000 for Family. A link to "Update your coverage level" is provided. The right section, titled "My Balance", shows a line graph of the account balance from January 2017 to January 2020, with the balance increasing from \$0 to approximately \$1,500.

On the far right, there is a promotional banner for the BenefitWallet Mobile App, which includes a photo of a person using a smartphone and text encouraging users to download the app for on-the-go access to their HSA information.

In the top right corner of the dashboard, a bell icon is highlighted with a red box, indicating where to click to set up alerts.

## How do I access my profile?

Click on your name in the upper right corner and then click *My Profile*





# How do I order checks?

Home

Go to  
*Order Checks*  
from the  
My Money Menu

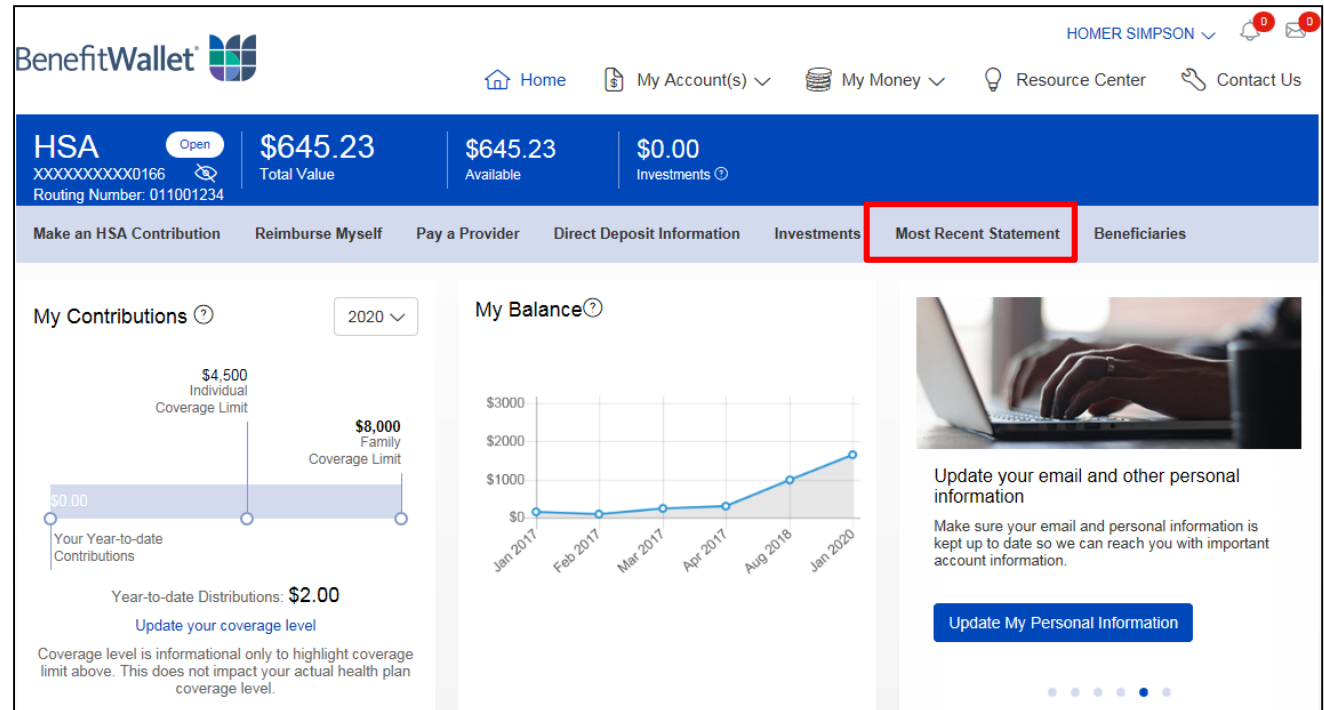
Note: You must submit a Master Signature Card before receiving a checkbook. To download your Master Signature Card, go to the Resource Center

The screenshot shows the BenefitWallet website interface. At the top, the user is logged in as HOMER SIMPSON. The navigation bar includes links for Home, My Account(s), My Money, Resource Center, and Contact Us. The 'My Money' menu is open, showing options like Contribution Center, Payment Center, My Health Plan Claims, My Filing Cabinet, My Debit Cards, **Order Checks** (highlighted with a red box), and Investments. The main content area displays HSA account information: HSA (Open), Total Value \$645.23, Available \$645.23, and Investments \$0.00. Below this, there are sections for 'My Contributions' (showing a bar chart for 2020 with a \$4,500 Individual Coverage Limit and \$8,000 Family Coverage Limit) and 'My Balance' (showing a line chart from Jan 2017 to Jan 2020). A sidebar on the right contains a 'Considering Medicare?' section with links to learn more.

# How do I access HSA statements?

Home

Select *Most Recent Statement* from the quick links and select the statement to view



# How do I reorder a debit card?

Home

Go to *My Debit Cards* from the My Money Menu

The screenshot shows the BenefitWallet website interface. At the top, the user is logged in as HOMER SIMPSON. The navigation bar includes links for Home, My Account(s), My Money, Resource Center, and Contact Us. The 'My Money' menu is open, displaying a list of 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 main content area is divided into two sections: 'My Contributions' and 'My Balance'. The 'My Contributions' section shows a bar chart for 2020 with a year-to-date balance of \$0.00 and a year-to-date distribution of \$2.00. The 'My Balance' section shows a line chart for 2020 with a balance of \$645.23. The 'My Debit Cards' option is highlighted with a red box.

BenefitWallet

HOMER SIMPSON

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

HSA Open \$645.23 Total Value \$645.23 Available \$0.00 Investments

XXXXXXXXXX0166 Routing Number: 011001234

Make an HSA Contribution Reimburse Myself Pay a Provider Direct Deposit Information

My Contributions 2020

\$4,500 Individual Coverage Limit \$8,000 Family Coverage Limit

\$0.00 Your Year-to-date Contributions

Year-to-date Distributions: \$2.00

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

\$3000 \$2000 \$1000 \$0

Jan 2017 Feb 2017 Mar 2017 Apr 2017 Aug 2018 Jan 2020

Contribution Center

Payment Center

My Health Plan Claims

My Filing Cabinet

My Debit Cards

Order Checks

Investments

Beneficiaries

contribution limits for 2019

\$3,500

\$0

your tax savings by increasing your payroll contributions through your employer or contribute outside of payroll directly by clicking [Make an HSA Contribution](#).

Remember: you can change your contribution levels any time, not just during open enrollment.

# Where is my HSA filing cabinet?

Home

Go to *My Filing Cabinet* From the My Money menu

The screenshot shows the BenefitWallet HSA dashboard. At the top, the user is logged in as HOMER SIMPSON. The main navigation bar includes links for Home, My Account(s), My Money, Resource Center, and Contact Us. The HSA summary section displays the account number XXXXXXXXXX0166, routing number 011001234, and a balance of \$645.23. Below this, there are tabs for 'Make an HSA Contribution', 'Reimburse Myself', 'Pay a Provider', and 'Direct Deposit Information'. The 'My Money' menu is open, showing options like 'Contribution Center', 'Payment Center', 'My Health Plan Claims', 'My Filing Cabinet' (highlighted with a red box), 'My Debit Cards', 'Order Checks', and 'Investments'. The 'My Contributions' section shows a year-to-date balance of \$0.00 and coverage limits of \$4,500 for individual and \$8,000 for family. The 'My Balance' section shows a line graph of the account balance from January 2017 to January 2020, with a year-to-date distribution of \$2.00.

BenefitWallet

HOMER SIMPSON

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

HSA XXXXXXXXXX0166 Routing Number: 011001234

Open \$645.23 Total Value \$645.23 Available \$0.00 Investments

Make an HSA Contribution Reimburse Myself Pay a Provider Direct Deposit Information

My Filing Cabinet

My Contributions 2020

\$4,500 Individual Coverage Limit \$8,000 Family Coverage Limit

\$0.00 Your Year-to-date Contributions

Year-to-date Distributions: \$2.00

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

\$3000 \$2000 \$1000 \$0

Jan 2017 Feb 2017 Mar 2017 Apr 2017 Aug 2018 Jan 2020

contribution limits for 2019!

ur tax savings by increasing your payroll contributions through your employer or contribute outside of payroll directly by clicking [Make an HSA Contribution](#).

Remember: you can change your contribution levels any time, not just during open enrollment.

# How do I access forms and educational material?

Home

Go to the  
Resource  
Center

The screenshot displays the BenefitWallet user interface. At the top, the user is logged in as HOMER SIMPSON. The navigation bar includes links for Home, My Account(s), My Money, Resource Center, and Contact Us. Below the navigation bar, a blue header displays HSA account information: an 'Open' button, account number XXXXXXXXXX0166, routing number 011001234, and a balance of \$645.23. A secondary bar lists actions: Make an HSA Contribution, Reimburse Myself, Pay a Provider, Direct Deposit Information, Investments, Most Recent Statement, and Beneficiaries. The main 'Resource Center' section is divided into three columns. The first column, 'HSA Education Materials', lists links to 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. The second column, 'Videos', lists links to HSA Overview, HSA Tax Savings, Tax Guidelines for HSAs, HSA Tax Forms, Saving With Your HSA, Spending With Your HSA, Investing With Your HSA, and Mobile App Experience. The third column, 'Personal Information Forms', lists links to Master Signature Card, Additional Signature Authorization Form, Reopen Account Form, Personal Data Change Form, Durable Power of Attorney, Tax Form Reprint Form, Account Statement Reprint Form, Foreign Address Update Form, and Spousal consent form.

BenefitWallet

HOMER SIMPSON

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

**HSA** Open **\$645.23** **\$645.23** **\$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 Beneficiaries

**Resource Center**

**HSA Education Materials**

- HSA Overview
- Five Reasons to Open Your HSA
- Investments
- Making HSAs Work for You
- HSA/FSA/HRA Compare
- HSA Transfer Process
- HSA Eligible Expenses

**Videos**

- HSA Overview
- HSA Tax Savings
- Tax Guidelines for HSAs
- HSA Tax Forms
- Saving With Your HSA
- Spending With Your HSA
- Investing With Your HSA
- Mobile App Experience

**Personal Information Forms**

- Master Signature Card
- Additional Signature Authorization Form
- Reopen Account Form
- Personal Data Change Form
- Durable Power of Attorney
- Tax Form Reprint Form
- Account Statement Reprint Form
- Foreign Address Update Form
- Spousal consent form

If you have questions, please contact the BenefitWallet Service Center by going to *Contact Us*.

The screenshot shows the BenefitWallet member portal. At the top, the user is logged in as HOMER SIMPSON. The navigation bar includes links for Home, My Account(s), My Money, Resource Center, and Contact Us (highlighted with a red box). Below the navigation bar, the HSA account summary is displayed: HSA (Open), Total Value \$645.23, Available \$645.23, and Investments \$0.00. The account number is XXXXXXXXXXXX0166 and the routing number is 011001234. A menu bar below the summary includes links for Make an HSA Contribution, Reimburse Myself, Pay a Provider, Direct Deposit Information, Investments, Most Recent Statement, and Beneficiaries. The main content area is divided into three sections: My Contributions (showing a bar chart for 2020 with a \$4,500 Individual Coverage Limit and \$8,000 Family Coverage Limit, and a year-to-date contribution of \$0.00), My Balance (showing a line chart of the balance from Jan 2017 to Jan 2020, with a year-to-date distribution of \$2.00), and HSA Beneficiaries (a notice stating that no beneficiary has been named and an 'Act Now' button).

BenefitWallet

HOMER SIMPSON

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

HSA [Open](#) \$645.23 Total Value \$645.23 Available \$0.00 Investments

XXXXXXXXXXXX0166 Routing Number: 011001234

Make an HSA Contribution Reimburse Myself Pay a Provider Direct Deposit Information Investments Most Recent Statement Beneficiaries

**My Contributions** 2020

\$4,500 Individual Coverage Limit \$8,000 Family Coverage Limit

\$0.00 Your Year-to-date Contributions

Year-to-date Distributions: \$2.00

[Update your coverage level](#)

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**My Balance**

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