WEX HEALTH CLOUD CONSUMER PORTAL QUICKSTART GUIDE

Welcome to your Summit Administration Services Benefit Accounts Consumer Portal. This one-stop portal gives you 24/7 access to view information and manage your Flexible Spending Account (FSA). It enables you to:

- File a claim online
- Upload receipts and track expenses
- View up-to-the-minute account balances
- View your account activity, claims history and payment (reimbursement) history
- Report a lost/stolen Card and request a new one
- Update your personal profile information
- Change your login password
- Download plan information, forms and notifications

The portal is designed to be easy to use and convenient. You have your choice of two ways to navigate this site:

1. Work from sections within the Home Page, or
2. Hover over or click on the four tabs at the top.

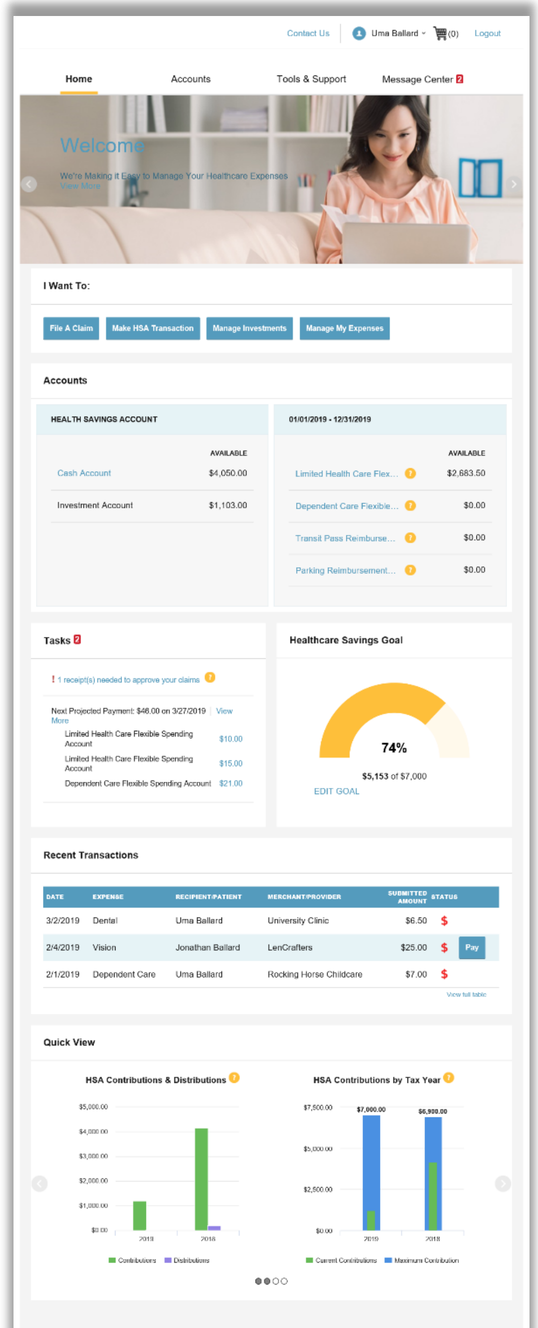
HOW DO I LOG ON TO HOME PAGE?

1. Go to https://SummitMember.LH1OnDemand.com
2. Enter your login ID and password (both provided by Summit). You will use the 1st initial of your first name, full last name, and the last 4 digits of your social security number for initial log in.
3. Click **Login**.

The **Home Page** is easy to navigate:

- Easily access the **Available Balance** and **"I Want To"** sections to work with your account right away.
- The **I Want To**…section contains the most frequently used features for the Consumer Portal.
- The **Accounts** section links to your Accounts and Profile.
- The **Tasks** section displays alerts and relevant links that enable you to keep current on your accounts.
- The **Recent Transaction** section displays the last 3 transactions on your account(s).
- The **Quick View** section graphically displays some of your key account information.

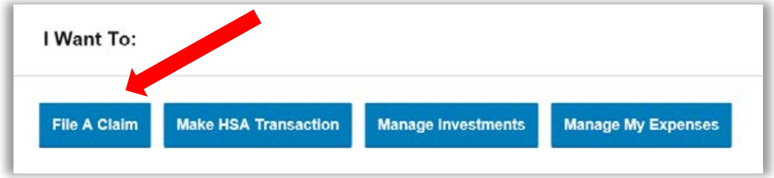
You can also hover over the tabs at the top of the page.

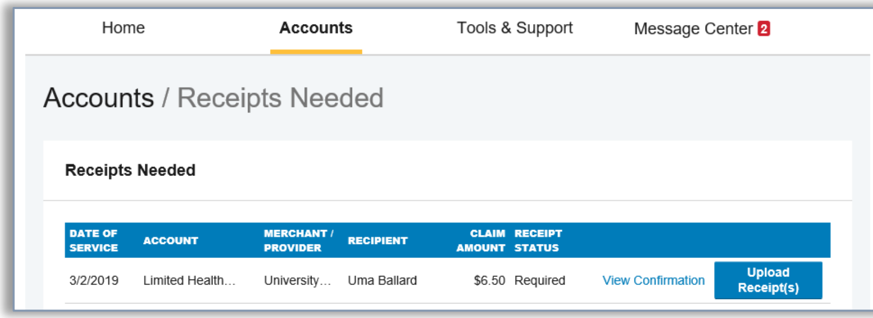


HOW DO I FILE A CLAIM AND UPLOAD A RECEIPT?

1. On the **Home Page**, you may simply select the "**File a Claim**" under the "I want to…" section, **OR** from any page on the portal, expand the **Accounts** tab on the top of the screen.
2. The claim filing wizard will walk you through the request including entry of information, payee details and uploading a receipt.
3. For submitting more than one claim, click **Add Another**, from the **Transaction Summary** page.
4. When all claims are entered in the **Transaction Summary**, agree to the terms and conditions click **Submit** to send the claims for processing.
5. The **Claim Confirmation** page displays. You may print the **Claim Confirmation Form** as a record of your submission. If you did not upload a receipt, you can upload the receipt from this screen or print a **Claim Confirmation Form** to submit to the administrator with the required receipts.

NOTE: If you see a **Receipts Needed** link in the Tasks section of your Home Page, click on it. You will be taken to the **Claims** page where you can see the claims that require documentation. You can easily upload the receipts from this page or use one of your **Mobile Quick Receipts**.



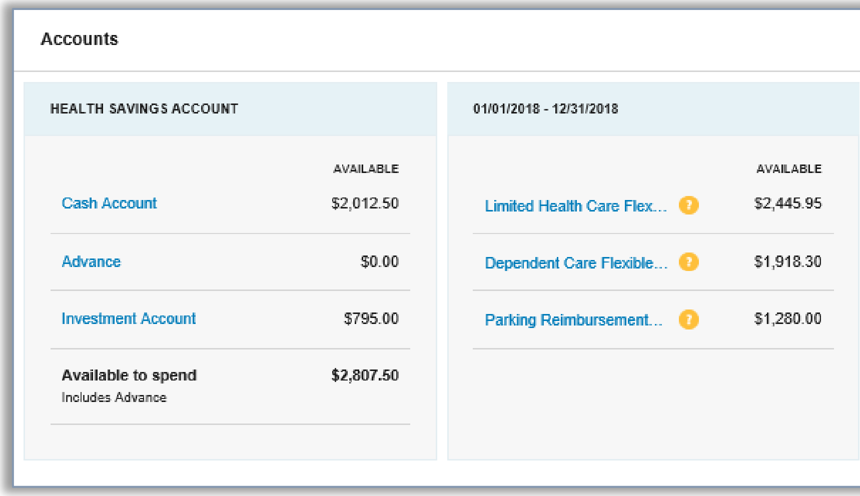


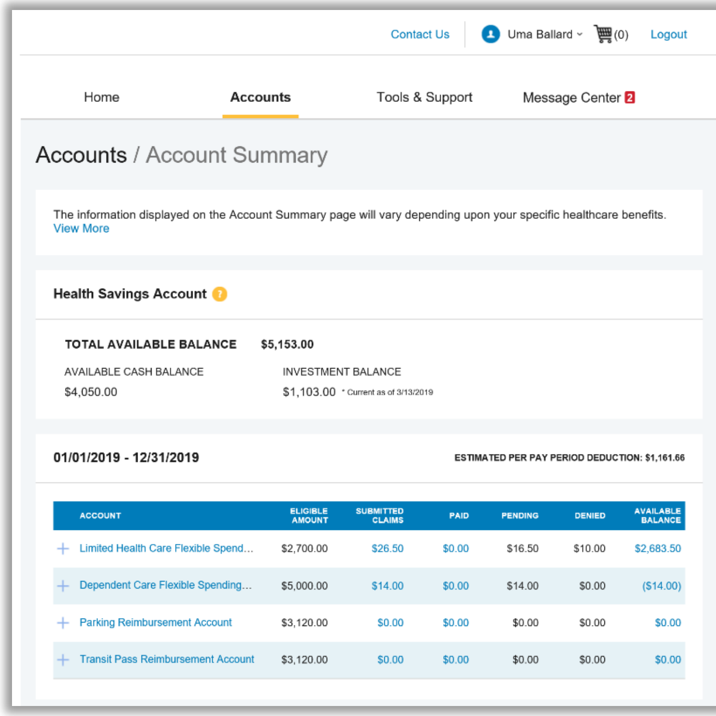
HOW DO I VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY?

1. For current Account Balance only, on the **Home Page**, see the **Accounts** section.

2. For all Account Activity, click on the **Accounts** tab from the Home Page to bring you to the Account Summary page. Then you may select the underlined dollar amounts for more detail. For example, click on the amount under "Eligible Amount" to view enrollment detail.

NOTE: You can see election details by clicking to expand the line item for each account.





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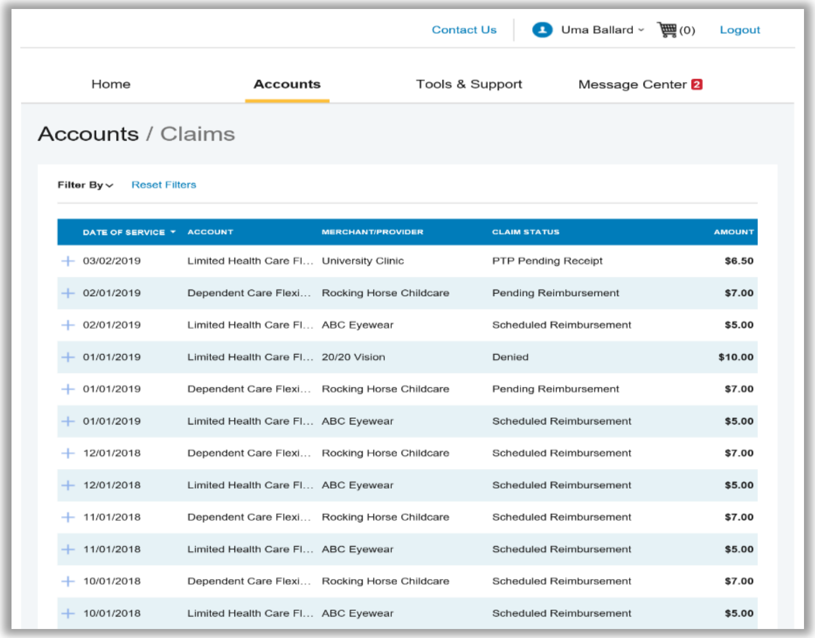
HOW DO I VIEW MY CLAIMS HISTORY AND STATUS?

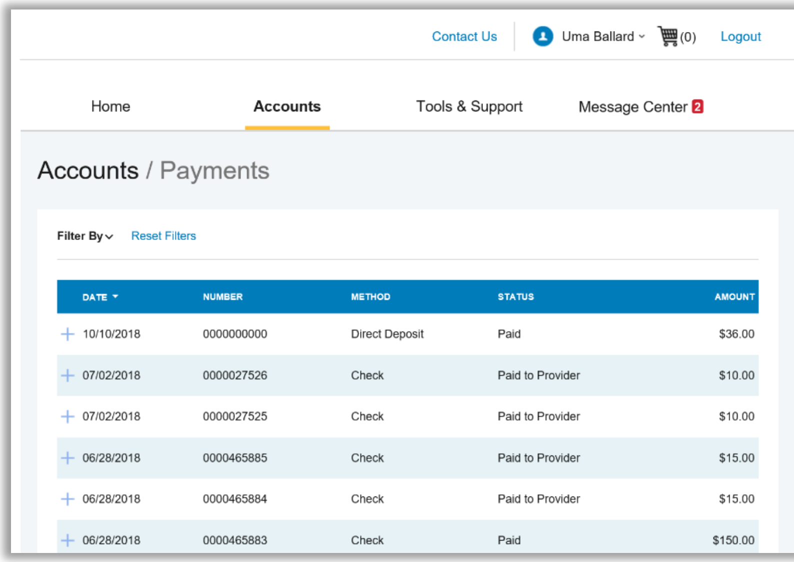
1. From the **Home Page**, click on the **Accounts Tab,** and then click on the **Claims** link to see your claims history. You can apply filters from the top of the screen. You can filter by plan year, account type, claim status or receipt status.
2. By clicking on the line of the claim, you can expand the data to display additional claim details.



DATE OF SERVICE	ACCOUNT	MERCHANT/PROVIDER	CLAIM STATUS	AMOUNT
03/02/2019	Limited Health Care Fl...	University Clinic	PTP Pending Receipt	$6.50
02/01/2019	Dependent Care Flexi...	Rocking Horse Childcare	Pending Reimbursement	$7.00
02/01/2019	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	$5.00
01/01/2019	Limited Health Care Fl...	20/20 Vision	Denied	$10.00
01/01/2019	Dependent Care Flexi...	Rocking Horse Childcare	Pending Reimbursement	$7.00
01/01/2019	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	$5.00
12/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	$7.00
12/01/2018	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	$5.00
11/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	$7.00
11/01/2018	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	$5.00
10/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	$7.00
10/01/2018	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	$5.00

HOW DO I VIEW MY PAYMENT (REIMBURSEMENT) HISTORY?

1. From the **Home Page**, under the **Accounts** tab, click **Payments**. You will see reimbursement payments made to date, including debit card transactions.
2. By clicking on the line of a payment, you can expand the data to display additional details about the transaction.



DATE	NUMBER	METHOD	STATUS	AMOUNT
10/10/2018	0000000000	Direct Deposit	Paid	$36.00
07/02/2018	0000027526	Check	Paid to Provider	$10.00
07/02/2018	0000027525	Check	Paid to Provider	$10.00
06/28/2018	0000465885	Check	Paid to Provider	$15.00
06/28/2018	0000465884	Check	Paid to Provider	$15.00
06/28/2018	0000465883	Check	Paid	$150.00

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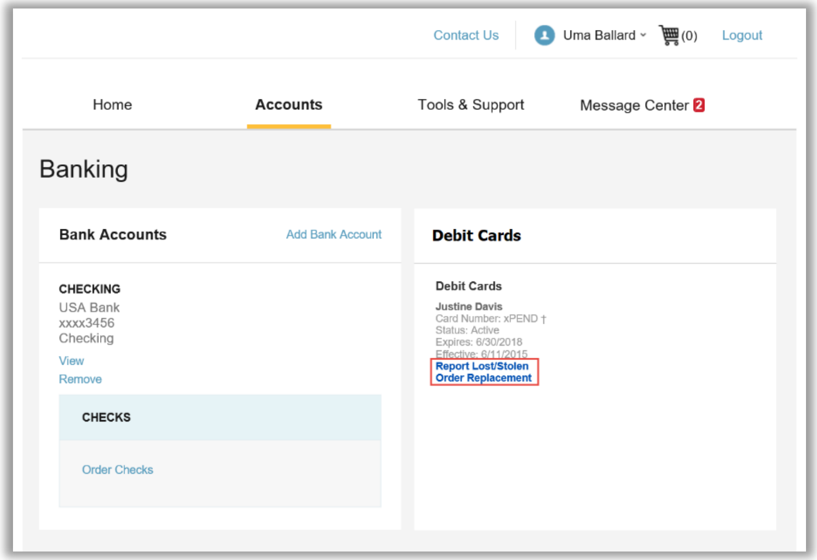
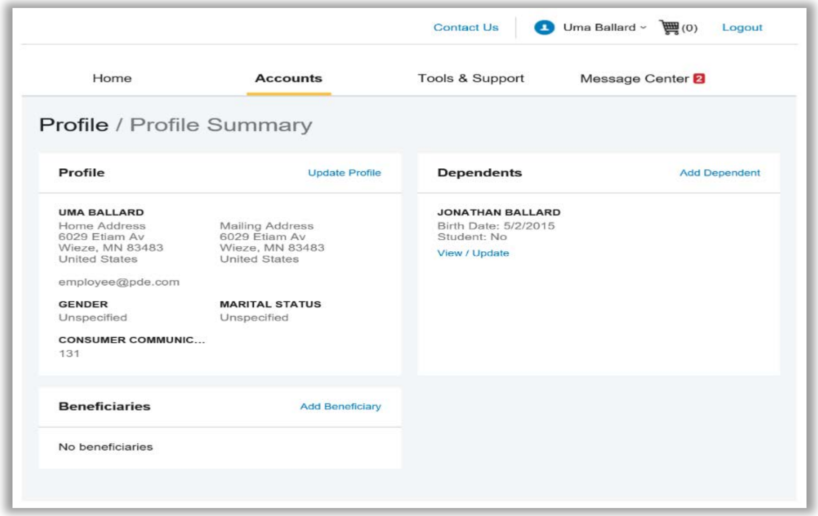
HOW DO I REPORT A DEBIT CARD MISSING AND/OR REQUEST A NEW CARD?

1. From the **Home Page**, under the **Accounts Tab**, click the **Banking** link.
2. Under the Debit Cards column, click **Report Lost/Stolen** or **Order Replacement** and follow instructions. There is a $10 fee for replacement cards. (funds are automatically taken from account balance)



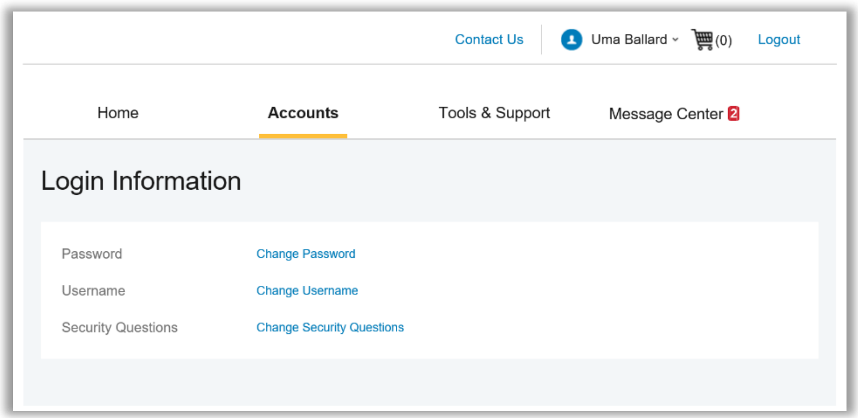
HOW DO I UPDATE MY PERSONAL PROFILE?

1. From the **Home Page**, under the **Accounts Tab,** you will find links to update profile information including profile summary details & dependents.
2. Click the appropriate link under Profile for your updates: **Update Profile** or **Add/Update Dependent.** Some profile changes will require you to answer an additional security question.
3. Complete your changes in the form.
4. Click **Submit**.



HOW DO I CHANGE MY PASSWORD?

1. From the **Home Page**, click on the **Accounts Tab**, and click **Login Information**.
2. Follow instructions on the screen.
3. Click **Save**.



HOW DO I VIEW OR ACCESS:

…DOCUMENTS & FORMS?

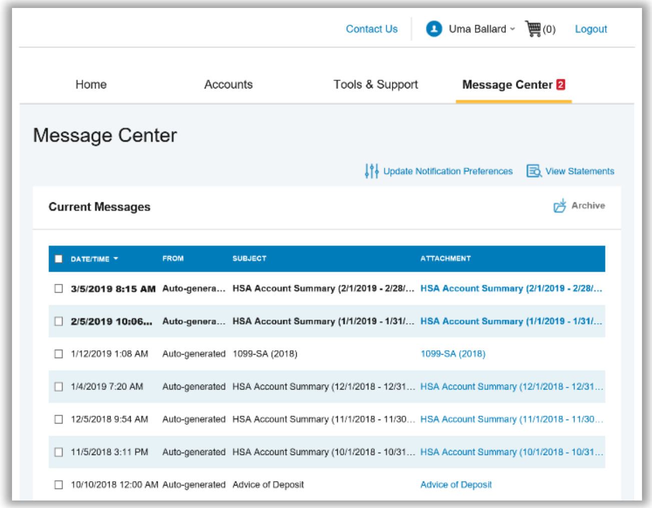
1. From the **Home Page**, click the **Tools & Support** tab.
2. Click any form or document of your choice.

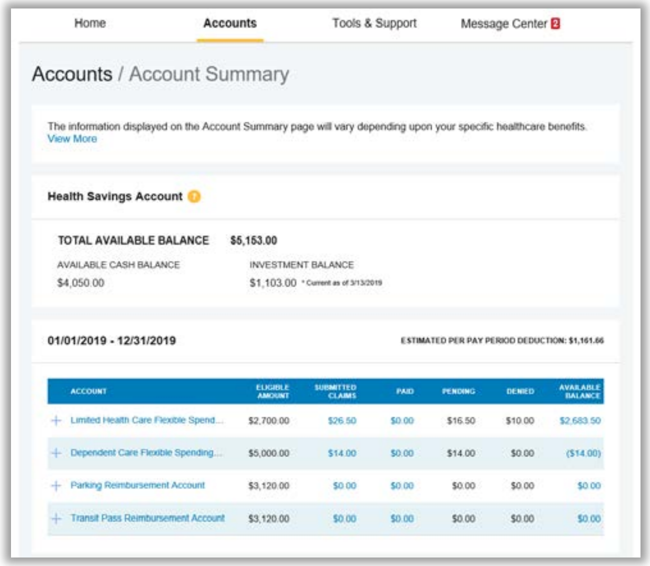
…NOTIFICATIONS?

1. From the **Home Page**, click the **Message Center** tab.
2. Click any link of your choice. You will be able to view and archive current documents, as well as reference documents archived previously.
3. In addition, you can **Update Notification Preferences** by clicking on the link next to Notifications.

…PLAN INFORMATION?

1. On the **Home Page**, under the **Accounts Tab**, you will be directed to the **Account Summary** page
2. Click onto the applicable account name and the **Plan Rules** will open in a pop-up window.
   <u>**OR**</u> from the **Home Page**, under the **Tools & Support** page, you may view **Plan Summaries** for basic information. Then click each applicable plan to see the plan details.





MORE HELPFUL INFORMATION

From the **Home Page**, under the **Tools & Support** tab, you may find links that connect you to helpful information supplied by your account administrator. These may be links to your employer's/account administrator's website or to other valuable resources that enable you to manage your healthcare more effectively.

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