

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.

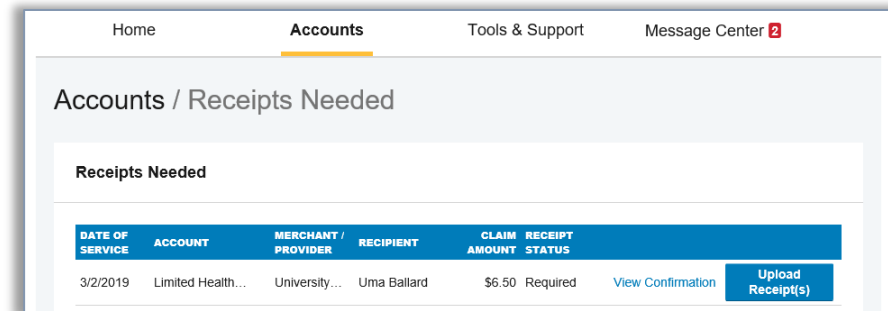
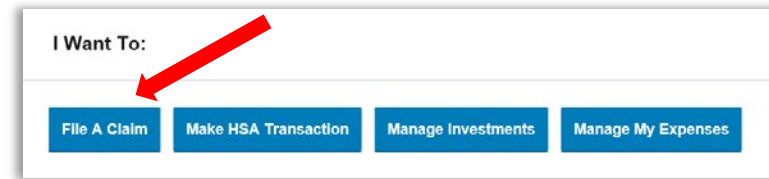
You can also hover over the tabs at the top of the page.

The screenshot displays the Summit Member Home Page. At the top, there are navigation tabs: Home, Accounts, Tools & Support, and Message Center. A user profile for Uma Ballard is visible in the top right corner. Below the navigation is a 'Welcome' banner with a photo of a woman. Underneath the banner is an 'I Want To:' section with buttons for 'File A Claim', 'Make HSA Transaction', 'Manage Investments', and 'Manage My Expenses'. The 'Accounts' section is divided into two columns. The left column shows the 'HEALTH SAVINGS ACCOUNT' with a 'Cash Account' of \$4,050.00 and an 'Investment Account' of \$1,103.00. The right column shows the period '01/01/2019 - 12/31/2019' with an 'Available' balance of \$2,683.50 and several other accounts with zero balances. Below the accounts are 'Tasks' and a 'Healthcare Savings Goal' progress indicator showing 74% completion towards a goal of \$5,153 of \$7,000. The 'Recent Transactions' section features a table with columns for Date, Expense, Recipient/Patient, Merchant/Provider, Amount, and Status. The 'Quick View' section contains two bar charts: 'HSA Contributions & Distributions' for 2018 and 2019, and 'HSA Contributions by Tax Year' for 2018 and 2019.

DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	QUOTED AMOUNT	STATUS
3/2/2019	Dental	Uma Ballard	University Clinic	\$6.50	\$
2/4/2019	Vision	Jonathan Ballard	LenCrafters	\$25.00	\$ Pay
2/1/2019	Dependent Care	Uma Ballard	Rocking Horse Childcare	\$7.00	\$

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.

HEALTH SAVINGS ACCOUNT		01/01/2018 - 12/31/2018	
	AVAILABLE		AVAILABLE
Cash Account	\$2,012.50	Limited Health Care Flex...	\$2,445.95
Advance	\$0.00	Dependent Care Flexible...	\$1,918.30
Investment Account	\$795.00	Parking Reimbursement...	\$1,280.00
Available to spend <small>Includes Advance</small>	\$2,807.50		

[Contact Us](#) | [Uma Ballard](#) | [\(0\)](#) | [Logout](#)

[Home](#) | **[Accounts](#)** | [Tools & Support](#) | [Message Center](#)

Accounts / Account Summary

The information displayed on the Account Summary page will vary depending upon your specific healthcare benefits. [View More](#)

Health Savings Account

TOTAL AVAILABLE BALANCE	\$5,153.00
AVAILABLE CASH BALANCE	INVESTMENT BALANCE
\$4,050.00	\$1,103.00 * Current as of 3/13/2019

01/01/2019 - 12/31/2019 ESTIMATED PER PAY PERIOD DEDUCTION: \$1,161.66

ACCOUNT	ELIGIBLE AMOUNT	SUBMITTED CLAIMS	PAID	PENDING	DENIED	AVAILABLE BALANCE
+ Limited Health Care Flexible Spend...	\$2,700.00	\$26.50	\$0.00	\$16.50	\$10.00	\$2,683.50
+ Dependent Care Flexible Spending...	\$5,000.00	\$14.00	\$0.00	\$14.00	\$0.00	(\$14.00)
+ Parking Reimbursement Account	\$3,120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
+ Transit Pass Reimbursement Account	\$3,120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

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

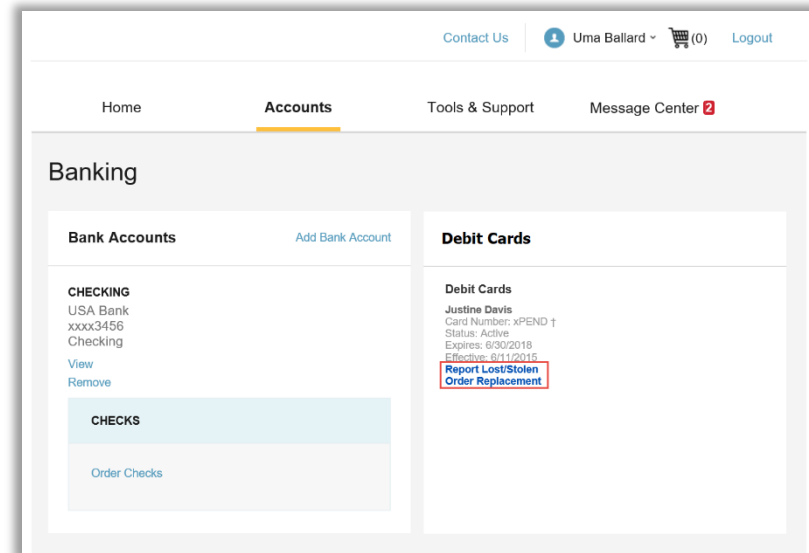
HOW DO I VIEW MY PAYMENT (REIMBURSEMENT) HISTORY?

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

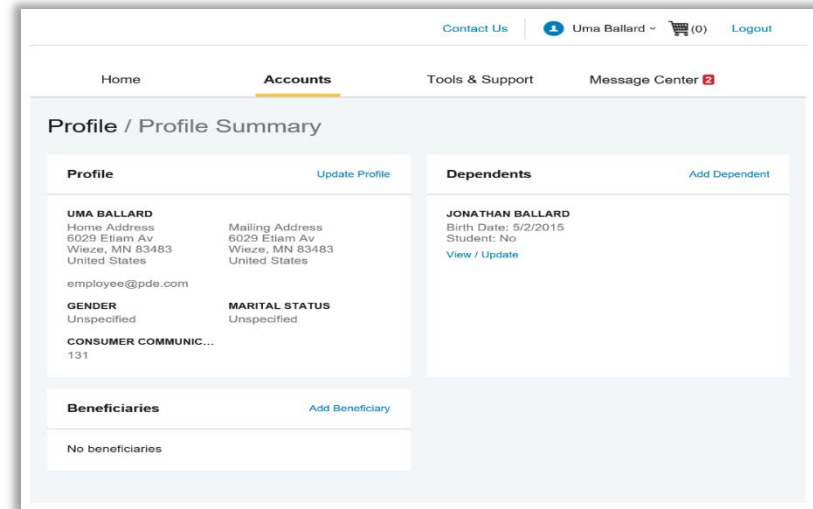
HOW DO I REPORT A DEBIT CARD MISSING AND/OR REQUEST A NEW CARD?

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)



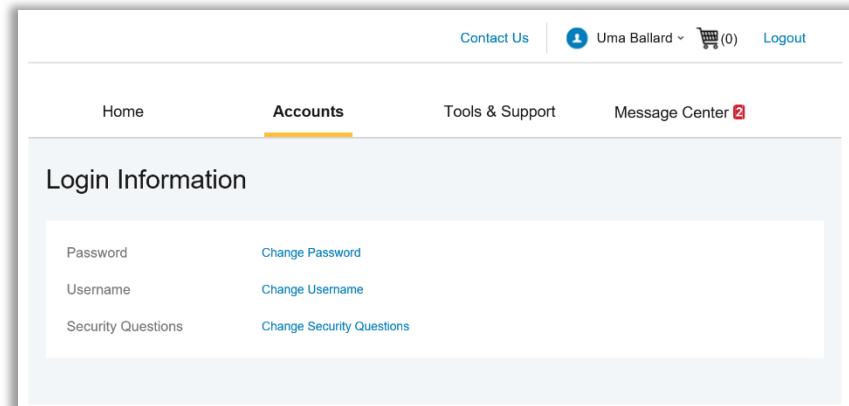
HOW DO I UPDATE MY PERSONAL PROFILE?

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.
OR 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.

The screenshot shows the 'Message Center' page. At the top, there are navigation tabs: Home, Accounts, Tools & Support, and Message Center (which is highlighted). Below the tabs, there are links for 'Update Notification Preferences' and 'View Statements'. The main section is titled 'Current Messages' and contains a table of messages. Each message row includes a checkbox, a date and time, the sender (Auto-generated), the subject, and the attachment name.

DATE/TIME	FROM	SUBJECT	ATTACHMENT
<input type="checkbox"/> 3/5/2019 8:15 AM	Auto-genera...	HSA Account Summary (2/1/2019 - 2/28/...	HSA Account Summary (2/1/2019 - 2/28/...
<input type="checkbox"/> 2/5/2019 10:06...	Auto-genera...	HSA Account Summary (1/1/2019 - 1/31/...	HSA Account Summary (1/1/2019 - 1/31/...
<input type="checkbox"/> 1/12/2019 1:08 AM	Auto-generated	1099-SA (2018)	1099-SA (2018)
<input type="checkbox"/> 1/4/2019 7:20 AM	Auto-generated	HSA Account Summary (12/1/2018 - 12/31/...	HSA Account Summary (12/1/2018 - 12/31/...
<input type="checkbox"/> 12/5/2018 9:54 AM	Auto-generated	HSA Account Summary (11/1/2018 - 11/30/...	HSA Account Summary (11/1/2018 - 11/30/...
<input type="checkbox"/> 11/5/2018 3:11 PM	Auto-generated	HSA Account Summary (10/1/2018 - 10/31/...	HSA Account Summary (10/1/2018 - 10/31/...
<input type="checkbox"/> 10/10/2018 12:00 AM	Auto-generated	Advice of Deposit	Advice of Deposit

The screenshot shows the 'Accounts / Account Summary' page. At the top, there are navigation tabs: Home, Accounts (highlighted), Tools & Support, and Message Center. Below the tabs, there is a note: 'The information displayed on the Account Summary page will vary depending upon your specific healthcare benefits. View More'. The main section is titled 'Health Savings Account' and shows the following balances:

TOTAL AVAILABLE BALANCE	\$5,163.00
AVAILABLE CASH BALANCE	INVESTMENT BALANCE
\$4,050.00	\$1,103.00 * Current as of 3/15/2019

Below the balances, there is a table for the period 01/01/2019 - 12/31/2019. The table has columns for ACCOUNT, ELIGIBLE AMOUNT, SUBMITTED CLAIMS, PAID, PENDING, DENIED, and AVAILABLE BALANCE. The estimated per pay period deduction is \$1,161.66.

ACCOUNT	ELIGIBLE AMOUNT	SUBMITTED CLAIMS	PAID	PENDING	DENIED	AVAILABLE BALANCE
+ Limited Health Care Flexible Spend...	\$2,700.00	\$26.50	\$0.00	\$16.50	\$10.00	\$2,683.50
+ Dependent Care Flexible Spending...	\$5,000.00	\$14.00	\$0.00	\$14.00	\$0.00	(\$14.00)
+ Parking Reimbursement Account	\$3,120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
+ Transit Pass Reimbursement Account	\$3,120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

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.