

# WEX HEALTH CLOUD CONSUMER PORTAL QUICKSTART GUIDE



Welcome to your OptiMed Health's 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 ID and/or 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,
2. Hover over or click on the six tabs at the top.

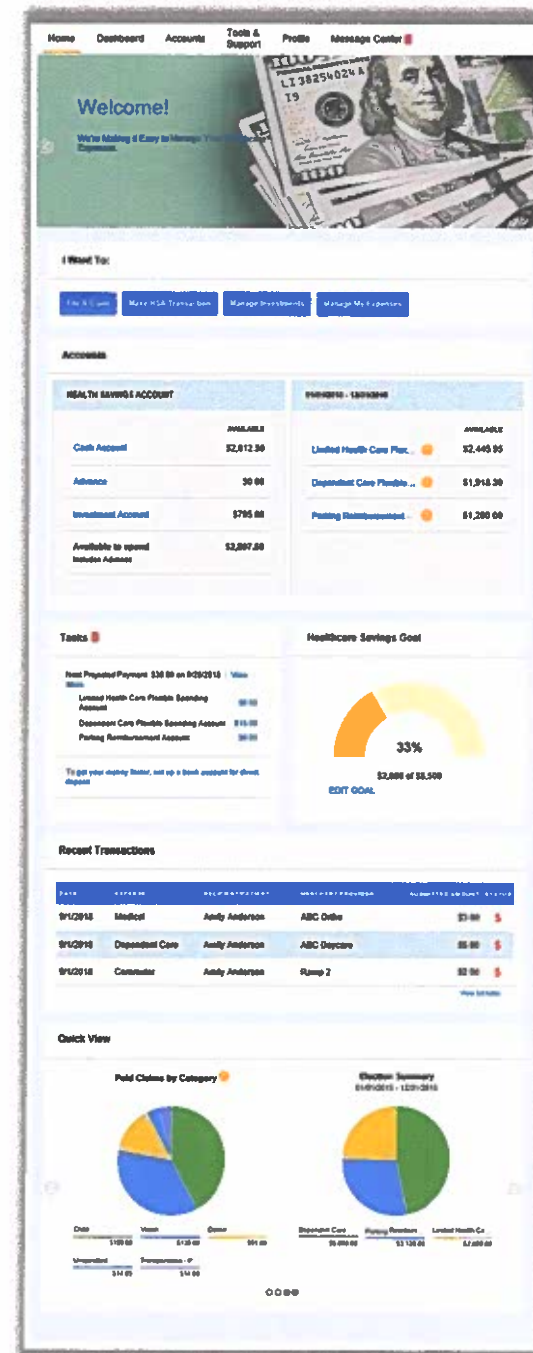
## HOW DO I LOG ON TO HOME PAGE?

1. Go to <https://optimed.lh1ondemand.com>
2. Enter your login ID and password (both provided by OptiMed Health)
3. Click **Login**.

The Home Page is easy to navigate:

- Easily access the **Available Balance** and **"I Want To"** sections to work with your accounts right away.
- The **I Want To...** section contains the most frequently used features for the Consumer Portal.
- The **Accounts** section links to the Account Summary page, where you can see and manage your accounts.
- The **Tasks** section displays alerts and relevant links that enable you to keep current on your accounts.
- The **Healthcare Savings Goal** section graphically displays your HSA savings goals progress.
- 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.

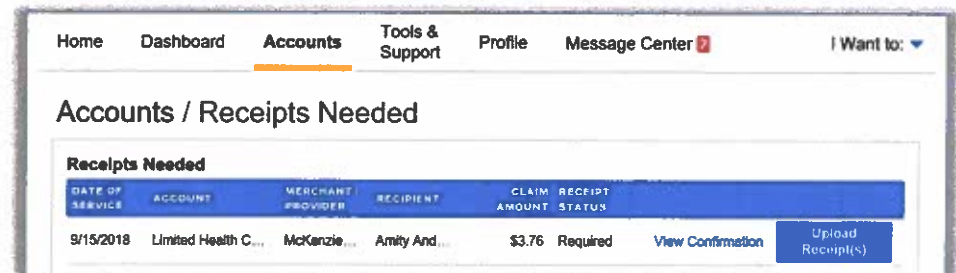


## HOW DO I FILE A CLAIM AND UPLOAD A RECEIPT?

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 **"I want to..."** section on the right-hand side 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. Simply click to expand the line item to view claim details and the **upload receipts link**.



## 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 Includes Advance	\$2,807.50		

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Accounts / Account Summary						
The information displayed on the Account Summary page will vary depending upon your specific healthcare benefits. <a href="#">View More</a>						
Health Savings Account						
	AVAILABLE CASH BALANCE	INVESTMENT BALANCE	TOTAL AVAILABLE BALANCE			
Education	\$2,012.50	\$795.00	\$2,807.50			
<small>* Current as of 01/01/2018</small>						
	ADVANCE BALANCE	ADVANCE REPAYMENT BALANCE				
Portfolio Performance	\$0.00	\$0.00				
01/01/2018 - 12/31/2018						
	ELIGIBLE AMOUNT	SUBMITTED CLAIMS	PAID	PENDING	DEBITED	AVAILABLE BALANCE
Limited Health Care Flexible Spending Account	\$2,650.00	\$211.55	\$195.05	\$9.00	\$7.50	\$2,445.95
Dependent Care Flexible Spending Account	\$5,000.00	\$165.00	\$150.00	\$15.00	\$0.00	\$1,918.30
Parking Reimbursement Account	\$3,120.00	\$20.00	\$14.00	\$6.00	\$0.00	\$1,280.00

Pay check deductions are based on your election and the number of scheduled pay periods within the plan year.

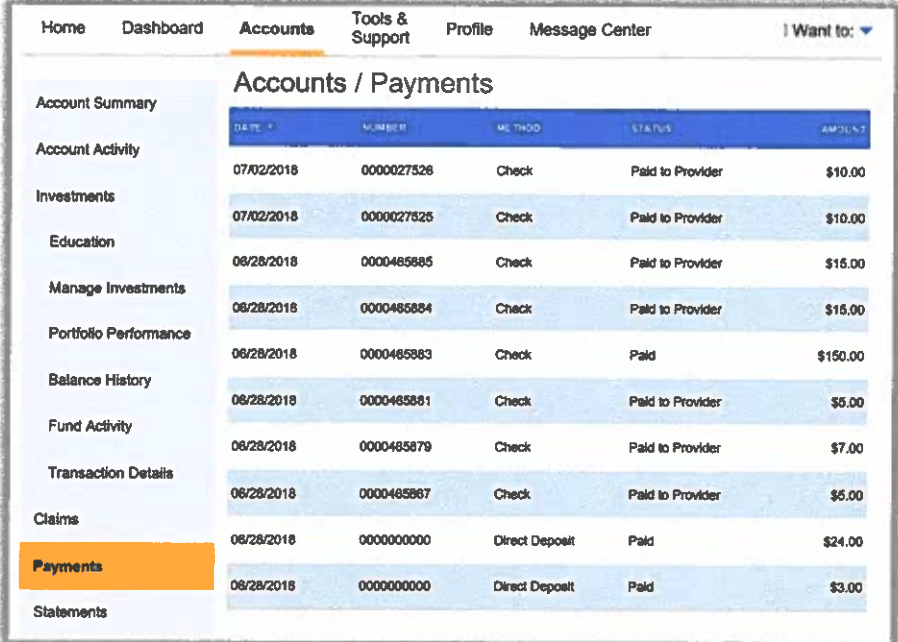
## HOW DO I VIEW MY CDH CLAIMS HISTORY AND STATUS?

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 left-hand side 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	REIMBURSEMENT PROVIDER	CLAIM STATUS	AMOUNT
09/01/2018	Dependent Care Flexible Spending Account	ABC Daycare	Pending Reimbursement	\$5.00
09/01/2018	Limited Health Care Flexible Spending Account	ABC Ortho	Pending Reimbursement	\$3.00
09/01/2018	Parking Reimbursement Account	Ramp 2	Pending Reimbursement	\$2.00
08/01/2018	Dependent Care Flexible Spending Account	ABC Daycare	Pending Reimbursement	\$5.00
08/01/2018	Limited Health Care Flexible Spending Account	ABC Ortho	Pending Reimbursement	\$3.00
08/01/2018	Parking Reimbursement Account	Ramp 2	Pending Reimbursement	\$2.00
07/01/2018	Dependent Care Flexible Spending Account	ABC Daycare	Pending Reimbursement	\$5.00
07/01/2018	Limited Health Care Flexible Spending Account	ABC Ortho	Pending Reimbursement	\$3.00
07/01/2018	Parking Reimbursement Account	Ramp 2	Pending Reimbursement	\$2.00
06/04/2018	Limited Health Care Flexible Spending Account	Eyeworks	Denied	\$2.50
06/01/2018	Dependent Care Flexible Spending Account	ABC Daycare	Paid	\$5.00
06/01/2018	Limited Health Care Flexible Spending Account	ABC Ortho	Paid	\$3.00
06/01/2018	Parking Reimbursement Account	Ramp 2	Paid	\$2.00
05/17/2018	Limited Health Care Flexible Spending Account	-	Paid	\$130.00
05/01/2018	Parking Reimbursement Account	-	Paid	\$5.00
05/01/2018	Dependent Care Flexible Spending Account	ABC Daycare	Paid	\$5.00
05/01/2018	Limited Health Care Flexible Spending Account	ABC Ortho	Paid	\$3.00
05/01/2018	Parking Reimbursement Account	Ramp 2	Paid	\$2.00
05/01/2018	Limited Health Care Flexible Spending Account	Bernard Dental	Denied	\$5.00
04/20/2018	Dependent Care Flexible Spending Account	-	Paid	\$120.00

## 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.



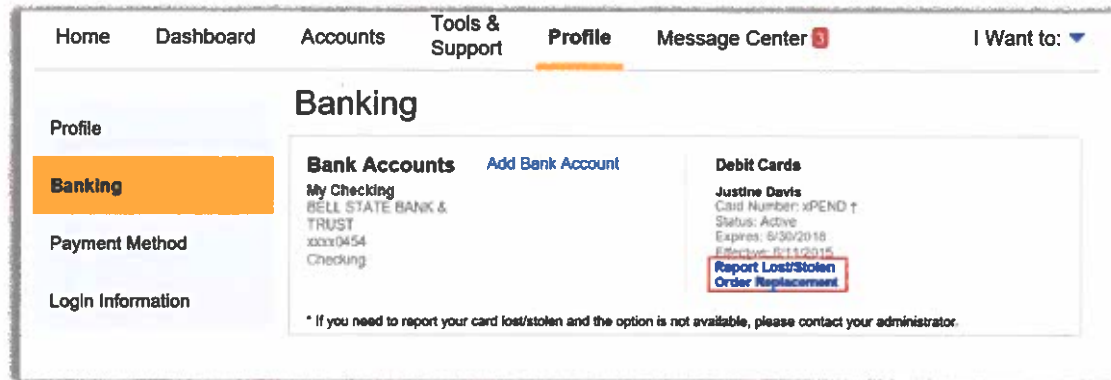
The screenshot shows a web application interface with a navigation menu on the left and a main content area. The navigation menu includes: Account Summary, Account Activity, Investments, Education, Manage Investments, Portfolio Performance, Balance History, Fund Activity, Transaction Details, Claims, **Payments** (highlighted in orange), and Statements. The main content area is titled "Accounts / Payments" and displays a table of payment transactions.

DATE	NUMBER	METHOD	STATUS	AMOUNT
07/02/2018	000027528	Check	Paid to Provider	\$10.00
07/02/2018	000027525	Check	Paid to Provider	\$10.00
08/28/2018	0000465885	Check	Paid to Provider	\$15.00
08/28/2018	0000465884	Check	Paid to Provider	\$15.00
08/28/2018	0000465883	Check	Paid	\$150.00
08/28/2018	0000465881	Check	Paid to Provider	\$5.00
08/28/2018	0000465879	Check	Paid to Provider	\$7.00
08/28/2018	0000465867	Check	Paid to Provider	\$5.00
08/28/2018	000000000	Direct Deposit	Paid	\$24.00
08/28/2018	000000000	Direct Deposit	Paid	\$3.00



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

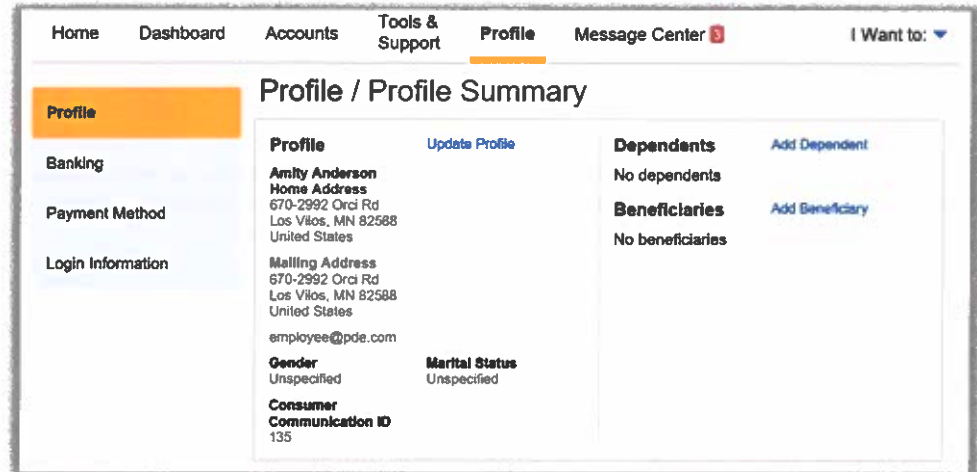
1. From the **Home Page**, under the **Profile**, click the **Banking** link on the left-hand side of the screen.
2. Under the Debit Cards column, click **Report Lost/Stolen** or **Order Replacement** and follow instructions.



3.

## HOW DO I UPDATE MY PERSONAL PROFILE?

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



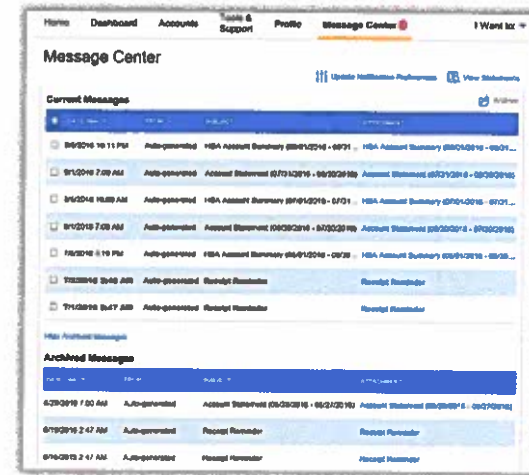
## HOW DO I VIEW OR ACCESS:

### ...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** tab, you may view **Plan Summaries** for basic information. Then click each applicable plan to see the plan details.

The screenshot shows the 'Accounts / Account Summary' page. The left sidebar contains navigation options: Account Summary (selected), Account Activity, Investments, Education, Manage Investments, Portfolio Performance, Balance History, Fund Activity, Transaction Details, Claims, Payments, and Statements. The main content area displays the 'Health Savings Account' summary. It includes a table for 'AVAILABLE CASH BALANCE' and 'INVESTMENT BALANCE' with a 'TOTAL AVAILABLE BALANCE' of \$2,807.50. Below this, there is a table for 'ADVANCE BALANCE' and 'ADVANCE REPAIRMENT BALANCE' showing a balance of \$0.00. The 'Balance History' section shows the period '01/01/2018 - 12/31/2018' with an estimated per pay period deduction of \$97.49. A table below shows 'ACCOLY\*' transactions with columns for 'TIMELY PAYMENT', 'UNPAID CLAIMS', 'P.O.', 'PENDING', 'DEBIT', and 'AVAILABLE BALANCE'. The table lists transactions for 'United Health Care Flexible Spending Account' and 'Dependent Care Flexible Spending Account'.

ACCOLY*	TIMELY PAYMENT	UNPAID CLAIMS	P.O.	PENDING	DEBIT	AVAILABLE BALANCE
United Health Care Flexible Spending Account	\$2,000.00	\$211.56	\$195.06	\$9.00	\$7.50	\$2,448.06
Dependent Care Flexible Spending Account	\$3,000.00	\$100.00	\$150.00	\$19.00	\$0.00	\$1,811.00