



Online Member Guide

A member's guide to the
BenefitWallet portal

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What can I find on the home page?

Home

Account Balance

Important graphs

Transactions

The screenshot shows the BenefitWallet interface for an HSA account. At the top, the user is identified as HOMER SIMPSON. The main account summary displays a balance of \$645.23, with \$645.23 available and \$0.00 in investments. Below this, there are navigation options: Make an HSA Contribution, Reimburse Myself, Pay a Provider, Direct Deposit Information, Investments, Most Recent Statement, and Beneficiaries.

Two graphs are featured: 'My Contributions' and 'My Balance'. The 'My Contributions' graph shows a year-to-date contribution of \$0.00, with coverage limits of \$4,500 for individual and \$8,000 for family. The 'My Balance' graph shows a balance starting at \$0 in Jan 2017 and rising to approximately \$1,500 by Jan 2020.

Additional information includes 'Higher maximum contribution limits for 2019!' with a list: Individual: \$3,500 and Family: \$7,000. A note encourages maximizing tax savings by increasing payroll contributions or contributing outside of payroll.

Month	Balance
Jan 2017	\$0
Feb 2017	\$0
Mar 2017	\$200
Apr 2017	\$300
Aug 2018	\$1,000
Jan 2020	\$1,500

Category	Limit
Individual Coverage Limit	\$4,500
Family Coverage Limit	\$8,000
Your Year-to-date Contributions	\$0.00
Year-to-date Distributions	\$2.00

How do I access recent account activity

Home

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

Transactions	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	

[More transactions](#)

How do I make payments and reimbursements?

Home

Select
*Reimburse
Myself*

or

*Pay a
Provider
from the
quick links*

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](#)

My Contributions 2020

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

Your Year-to-date Contributions: \$0.00

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

Date	Balance
Jan 2017	\$0
Feb 2017	\$0
Mar 2017	\$0
Apr 2017	\$0
Aug 2018	\$1,000
Jan 2020	\$1,500

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

BenefitWallet HOMER SIMPSON

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

HSA Open
XXXXXXXXXX0166
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
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[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*

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

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

Have you downloaded the BenefitWallet Mobile App?
Get on-the-go access and check your balance and transaction history, pay bills, make HSA contributions and more - all from the convenience of your mobile device.
Search for BenefitWallet and download the app today from the Android or Apple App store.

How do I access my profile?

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

The screenshot displays the BenefitWallet user interface. In the top right corner, the user's name "JANE SMITH" is shown with a dropdown arrow. A red box highlights this name and the "My Profile" option in the dropdown menu. Other options in the menu include "Change My Password", "Direct Deposit Information", "HSA Alerts", and "Logout". Below the menu, there is a section titled "Higher maximum contribution limits for 2020:" with a bulleted list:

- Individual: \$3,550
- Family: \$7,100

Below the list, there is a paragraph of text: "Maximize your tax savings by increasing your payroll contributions through your employer or contribute outside of payroll directly by clicking [Make an HSA Contribution](#)." and another paragraph: "Remember: you can change your contribution levels any time, not just during open enrollment." In the bottom left corner, there is a line graph showing data for the years 2019 and 2020.

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 HSA account interface. At the top, the user is identified as HOMER SIMPSON. The main header displays the HSA balance: \$645.23 Total Value, \$645.23 Available, and \$0.00 Investments. A dropdown menu is open from the 'My Money' section, with 'Order Checks' highlighted in a red box. Other menu items include Contribution Center, Payment Center, My Health Plan Claims, My Filing Cabinet, My Debit Cards, and Investments. The main content area is divided into 'My Contributions' and 'My Balance' sections. 'My Contributions' shows a year-to-date contribution of \$0.00 and a year-to-date distribution of \$2.00. 'My Balance' shows a line graph of the account balance from Jan 2017 to Jan 2020, with a projected balance of \$1,500.00 for Jan 2020. A 'Considering Medicare?' section is also visible at the bottom right.

How do I access HSA statements?

Home

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

The screenshot displays the BenefitWallet HSA account dashboard. At the top, the user is identified as HOMER SIMPSON. The main navigation bar includes links for Home, My Account(s), My Money, Resource Center, and Contact Us. The HSA account summary shows a Total Value of \$645.23, Available balance of \$645.23, and Investments of \$0.00. The 'Most Recent Statement' link in the navigation menu is highlighted with a red box. Below the navigation, there are sections for 'My Contributions' (showing a \$0.00 year-to-date total and coverage limits of \$4,500 for individual and \$8,000 for family) and 'My Balance' (showing a line graph of account activity from Jan 2017 to Jan 2020). A sidebar on the right contains a prompt to 'Update your email and other personal information' with a corresponding button.

How do I reorder a debit card?

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

The screenshot shows the BenefitWallet HSA dashboard. At the top, the user is identified as HOMER SIMPSON. The main header displays HSA account information: Total Value of \$645.23, Available balance of \$645.23, and Investments of \$0.00. A navigation menu is open, showing options like Contribution Center, Payment Center, My Health Plan Claims, My Filing Cabinet, My Debit Cards (highlighted with a red box), Order Checks, and Investments. Below the menu, the 'My Contributions' section shows a bar chart with coverage limits of \$4,500 for individual and \$8,000 for family, and a year-to-date contribution of \$0.00. The 'My Balance' section features a line chart showing the account balance from Jan 2017 to Jan 2020, with a year-to-date distribution of \$2.00.

Where is my HSA filing cabinet?

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

The screenshot shows the BenefitWallet HSA dashboard for user HOMER SIMPSON. The top navigation bar includes Home, My Account(s), My Money, Resource Center, and Contact Us. The HSA summary shows a Total Value of \$645.23, Available balance of \$645.23, and Investments of \$0.00. A dropdown menu is open under 'My Money', with 'My Filing Cabinet' highlighted in a red box. Other menu items include Contribution Center, Payment Center, My Health Plan Claims, My Debit Cards, Order Checks, and Investments. The main content area features 'My Contributions' (2020) with coverage limits of \$4,500 Individual and \$8,000 Family, and 'My Balance' with a line chart showing contributions from Jan 2017 to Jan 2020. A sidebar on the right contains information about 2019 contribution limits and a note about tax savings.

How do I access forms and educational material?

Home

Go to the Resource Center

The screenshot shows the BenefitWallet user interface for an HSA account. At the top, the user is identified as HOMER SIMPSON. The account status is 'Open' with a balance of \$645.23. Below this, a navigation bar includes links for 'Make an HSA Contribution', 'Reimburse Myself', 'Pay a Provider', 'Direct Deposit Information', 'Investments', 'Most Recent Statement', and 'Beneficiaries'. The 'Resource Center' is prominently displayed, divided into three columns:

- HSA Education Materials:** Includes links for 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.
- Videos:** Includes links for 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.
- Personal Information Forms:** Includes links for 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.

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

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 Investments Most Recent Statement Beneficiaries

My Contributions 2020

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

Your Year-to-date Contributions: \$0.00

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

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