

Online Member Guide

A member's guide to the BenefitWallet portal

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What can I find on the home page?

Account Balance →

Yearly growth →

Transactions →

The screenshot displays the BenefitWallet HSA home page. At the top, the user is identified as HOMER SIMPSON. The main header shows the HSA account status as 'Open' with a total value of \$645.23 and an available balance of \$645.23. Below this, there are navigation links for 'Make an HSA Contribution', 'Reimburse Myself', 'Pay a Provider', 'Direct Deposit Information', 'Investments', 'Most Recent Statement', and 'Beneficiaries'. The 'My Contributions' section features a chart showing the \$4,500 Individual Coverage Limit and \$8,000 Family Coverage Limit, with a 'Your Year-to-date Contributions' of \$0.00 and 'Year-to-date Distributions' of \$2.00. The 'My Balance' section includes a line graph showing the account balance growth from Jan 2017 to Jun 2020. A sidebar on the right highlights 'Higher maximum contribution limits for 2019!' with bullet points for Individual (\$3,500) and Family (\$7,000) limits, and a note to maximize tax savings by increasing payroll contributions.

How do I access recent account activity?

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

Transactions						
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?

- 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 Home, My Account(s), My Money, Resource Center, and Contact Us. The main header displays HSA account details: Total Value of \$645.23, Available balance of \$645.23, and Investments of \$0.00. A navigation menu below the header contains several options, with 'Reimburse Myself' and 'Pay a Provider' highlighted with red boxes. The dashboard is divided into three main sections: 'My Contributions' showing a bar chart of contributions and coverage limits (\$4,500 Individual and \$8,000 Family), 'My Balance' showing a line chart of account balance over time, and 'HSA Beneficiaries' with a message and an 'Act Now' button.

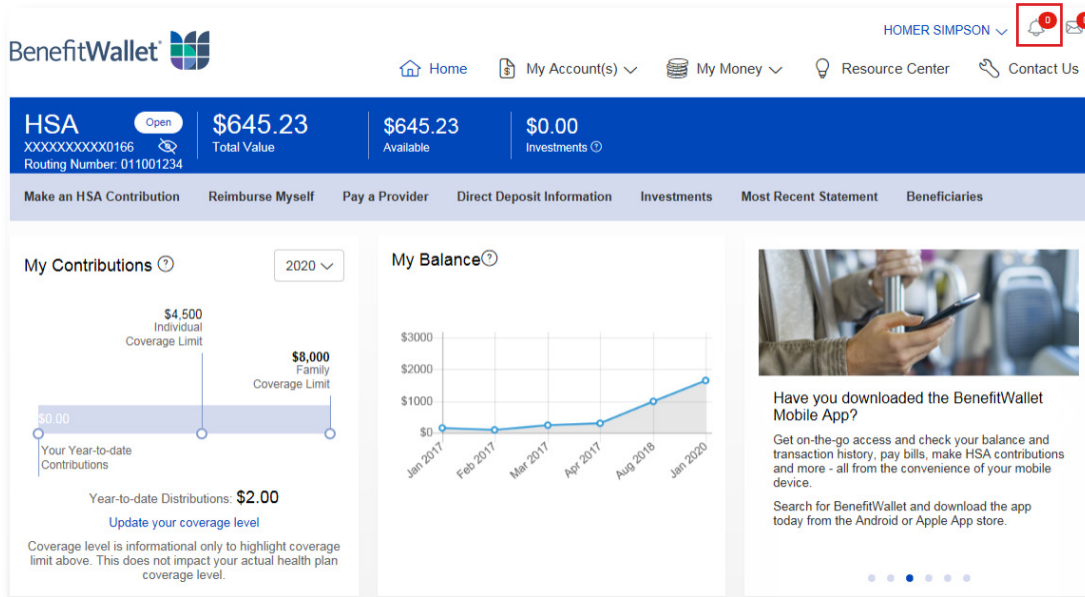
How do I make an electronic contribution?

- Select **Make an HSA Contribution** from the quick links.

This screenshot is identical to the one above, showing the BenefitWallet HSA dashboard. In this version, the 'Make an HSA Contribution' link in the navigation menu is highlighted with a red box, while 'Reimburse Myself' and 'Pay a Provider' are not. The rest of the dashboard content, including the account balances, charts, and beneficiary information, remains the same.

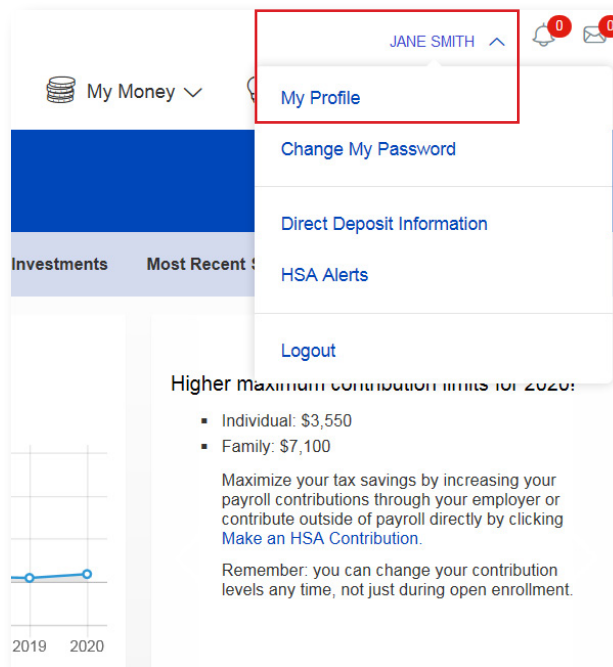
How do I set up HSA alerts?

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



How do I access my profile?

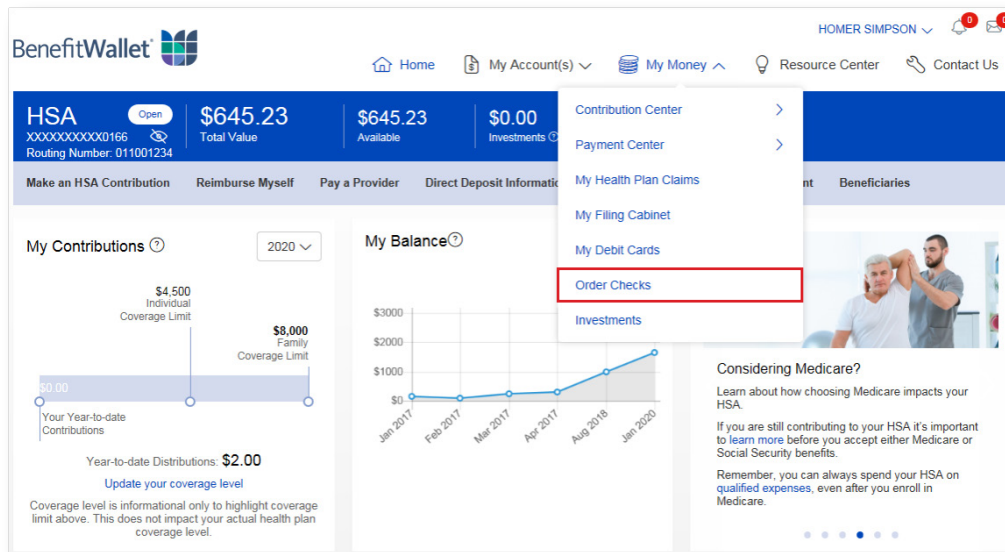
- Click on **your name** in the upper right corner and then click **My Profile**.



How do I order checks?

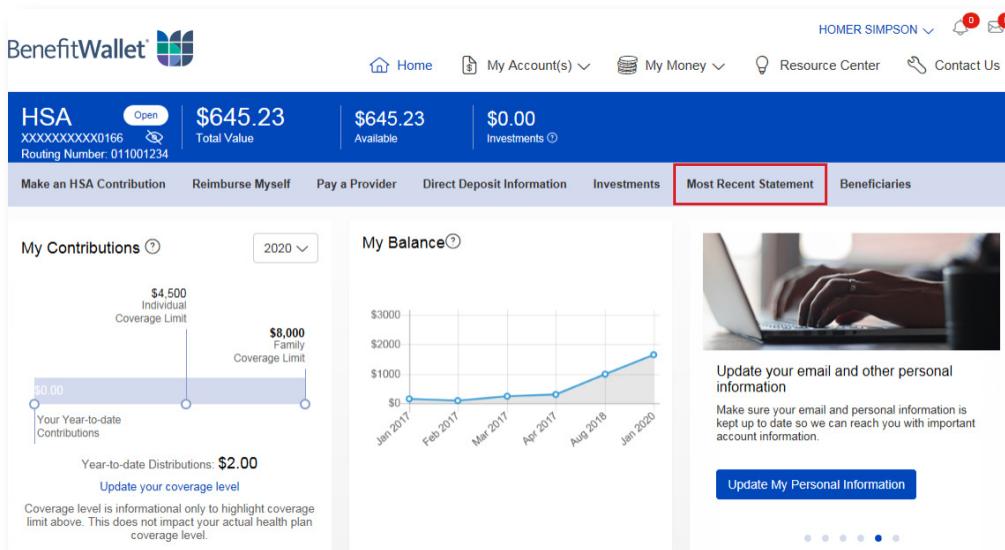
- Go to **Order Checks** from the **My Money** menu.

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



How do I access HSA statements?

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



How do I reorder a debit card?

- Go to **My Debit Cards** 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 main header displays HSA account details: Total Value \$645.23, Available \$645.23, and Investments \$0.00. A dropdown menu is open under 'My Money', with 'My Debit Cards' highlighted in a red box. Other menu items include Contribution Center, Payment Center, My Health Plan Claims, My Filing Cabinet, My Debit Cards, Order Checks, and Investments. The dashboard also features sections for 'My Contributions' (with a chart showing \$0.00 year-to-date contributions and \$2.00 distributions) and 'My Balance' (with a line chart showing a balance increase from Jan 2017 to Jan 2020).

Where is my HSA filing cabinet?

- Go to **My Filing Cabinet** from the **My Money** menu.

This screenshot is identical to the one above, showing the BenefitWallet HSA dashboard. In this instance, the dropdown menu under 'My Money' is open, and 'My Filing Cabinet' is highlighted in a red box. The rest of the dashboard content, including the account balances, contribution charts, and navigation links, remains the same.

How do I access forms and educational material?

- Go to the **Resource Center**.

The screenshot shows the BenefitWallet Resource Center page. At the top, there is a navigation bar with the BenefitWallet logo, a user profile for 'HOMER SIMPSON', and links for Home, My Account(s), My Money, Resource Center, and Contact Us. Below the navigation bar, a blue header displays account information: 'HSA' with an 'Open' button, 'Total Value' of \$645.23, 'Available' of \$645.23, and 'Investments' of \$0.00. A routing number 'XXXXXXXXXX0166' and 'Routing Number: 011001234' are also visible. A secondary navigation bar 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 titled 'Resource Center' and is divided into three columns: 'HSA Education Materials' (listing items like HSA Overview, Five Reasons to Open Your HSA, etc.), 'Videos' (listing items like HSA Overview, HSA Tax Savings, etc.), and 'Personal Information Forms' (listing items like Master Signature Card, Additional Signature Authorization Form, etc.).

Additional information

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

The screenshot shows the BenefitWallet 'My Contributions' and 'My Balance' pages. The top navigation and account information are identical to the previous screenshot. The 'My Contributions' section features a bar chart for the year 2020, showing 'Your Year-to-date Contributions' at \$0.00. It also displays coverage limits: '\$4,500 Individual Coverage Limit' and '\$8,000 Family Coverage Limit'. Below the chart, it states 'Year-to-date Distributions: \$2.00' and provides an 'Update your coverage level' link. A disclaimer notes that the coverage level is informational only. The 'My Balance' section features a line chart showing the balance from Jan-2017 to Jan-2020, with values starting at \$0 and rising to approximately \$1,500. To the right of the charts is a section titled 'HSA Beneficiaries' with a photo of a family and a message: 'According to our records, you have not named a beneficiary for your HSA. Save yourself potential tax consequences by naming your beneficiary today.' Below this message is a green 'Act Now' button.

