CONSUMER PORTAL QUICKSTART GUIDE

MEDSURETY
Maximize Your Health Savings

Welcome to your MEDSURETY Reimbursement Account Consumer Portal. This one-stop portal gives you 24/7 access to view information and manage your Account(s). 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
- Update your Beneficiaries for HSA Accounts

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.

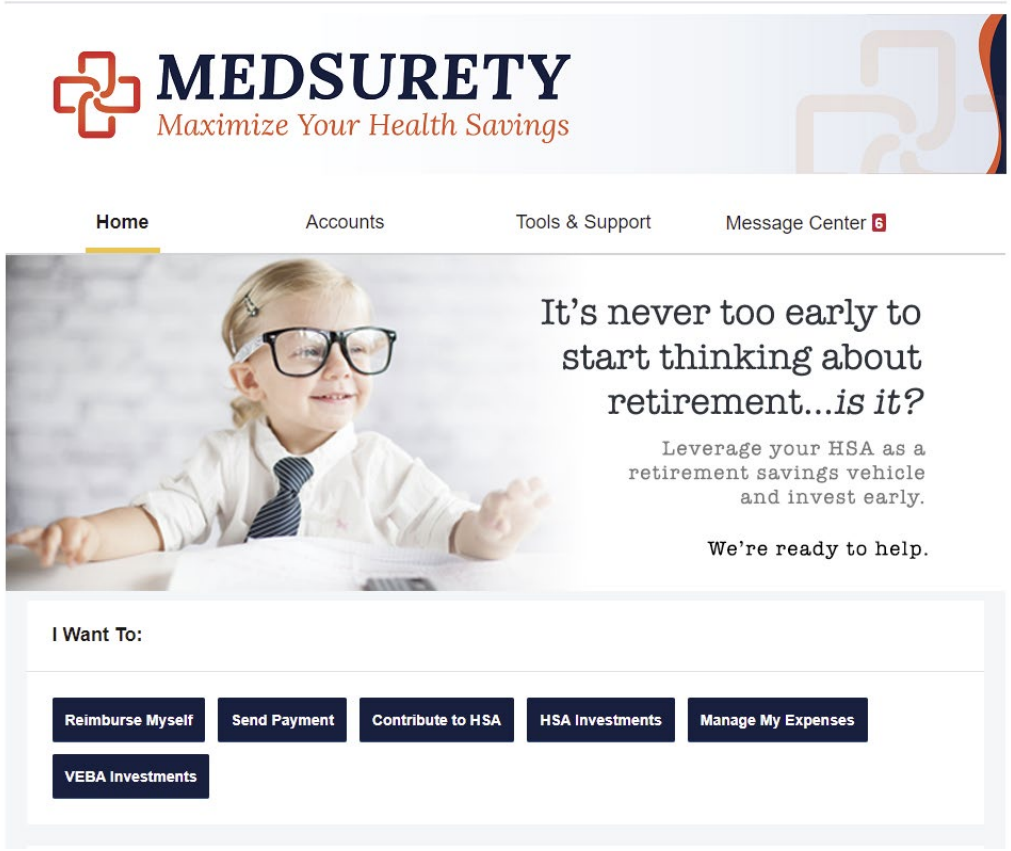
MEDSURETY, LLC
18001 HWY 7, Suite 204
Minnetonka, MN 55345
Fax: 952-856-2656, Main: 952-303-5700
www.medsurety.com

HOW DO I LOG ON TO HOME PAGE?

1. Go to **www.medsurety.com and click Login**
2. **Choose EMPLOYEE Login**
3. Enter your User ID (first time logging in - Last name and last 4 digits of your SSN). Click Next
4. Enter your password (first time logging in = SetUp01!)
5. Click **Login**.

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

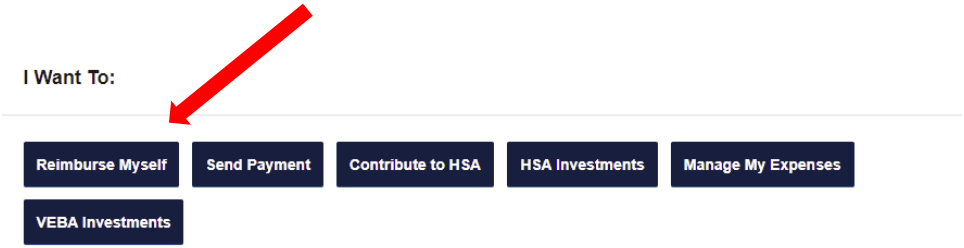
- Easily view your Accounts and **Available Balance(s)**
- The **I Want To** section contains the most frequently used features for the Consumer Portal.
- Across the top of the page, you can hover on **Accounts** to access accountactivity, claims details, payments, statements, HSA Investments, and profile information.
- **Tools & Support** will take you to all the forms you could need for your account(s) as well as Plan summaries, quick links, and other helpful information on your account(s).
- The **Message Center** section displays alerts and relevant links that enable you to keep current on your accounts.
- The **Quick View** section graphically displays some of your key account information.
- **Tasks** section notifies you of action items such as needed receipts, or the next projected payment amount and date.



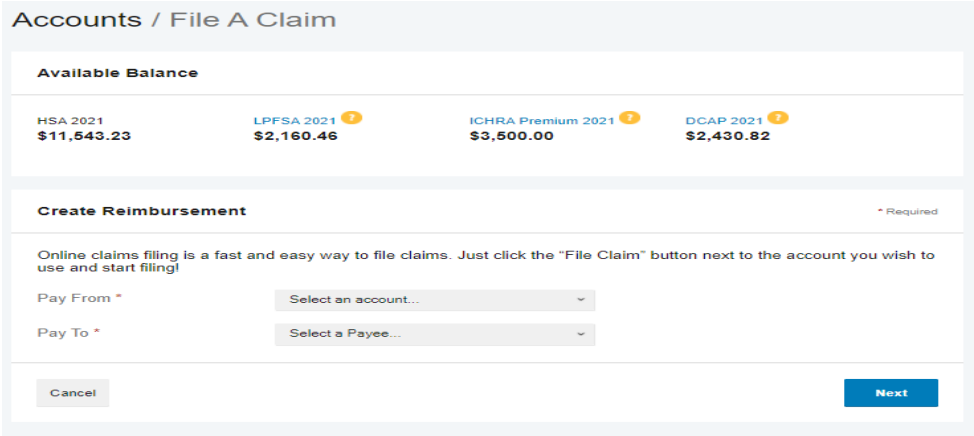
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HOW DO I FILE A CLAIM AND UPLOAD A RECEIPT?

1. On the **Home Page**, you may simply select the "**Reimburse Myself**" under the"I want to…" section.
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. If you did not upload a receipt, you will see a message in your tasks that will allow you to click on a link to upload your EOB or Receipt at a later time, or print a **Claim Confirmation Form** to submit to the administrator with the required receipts via email, fax, or mail.



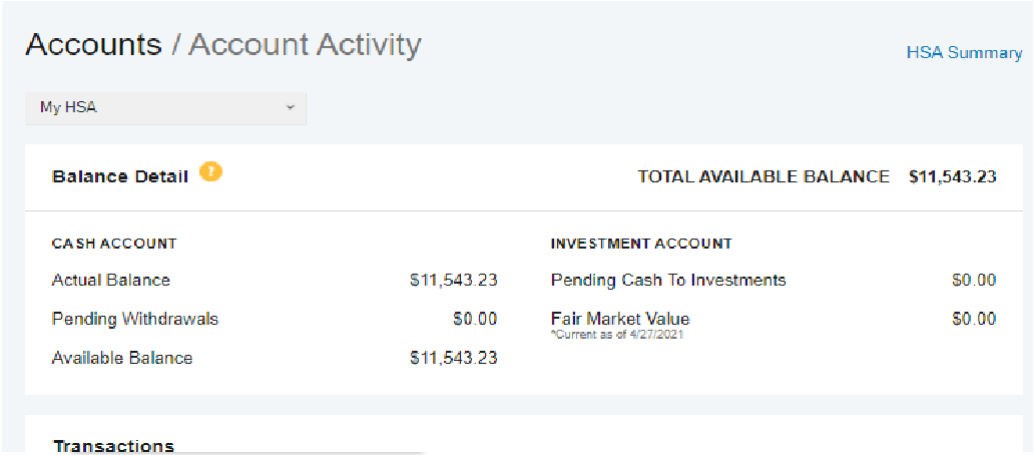
NOTE: If you see a **Receipts Needed** link under your Tasks section of your Home Page, click on it. You will be taken to the **Claims** page where you can see the claims that require documentation. You can easily upload the receipts from this page. Simply click to expand the line item to view claim details and the **upload receipts link.**

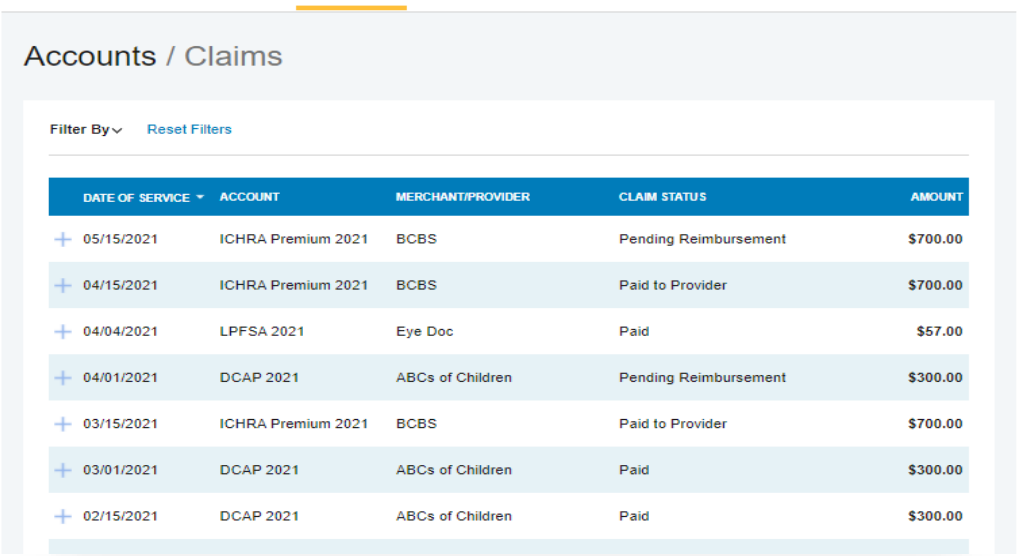


Note: FSA and HRA plans are regulated by the IRS. We are required to collect valid documentation for your expenses to ensure the plan is in compliance. Some but not all, Debit Card payments are able to auto-substantiate, and you will not need to upload documentation. Please be advised that it is best practice to keep copies of all receipts, itemized bill copies.

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/Claims Activity, either click on the **Account Name** from the Home Page to bring you to the Account Summary or Claims Detail page, or Hover on Accounts along the top of the home page and choose Account Summary or Activity. If you have multiple accounts, you can click the drop-down box to toggle between accounts.



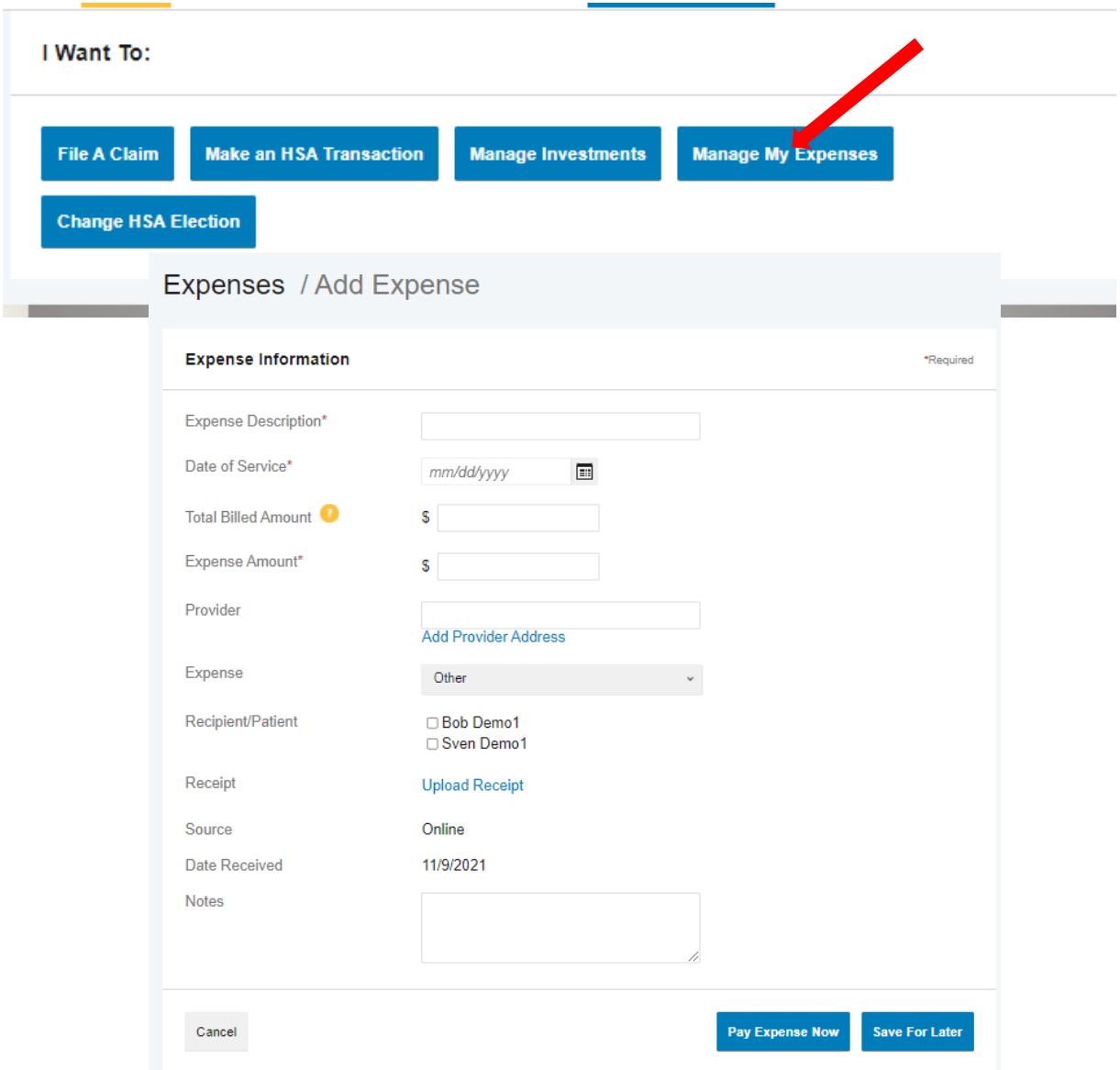


NOTE: You can see claim details by clicking the Plus sign to expand the line item for each claim.

HOW DO I ADD AN EXPENSE TO MANAGE MY EXPENSES?

Manage my Expenses is a tool that is available to you that allows you to file your expenses without seeking reimbursement at the time you are filing. This feature is most commonly used by HSA account holders to store their receipts and itemized bill copies in the event that they are audited.

1. From the **I Want To section on your home screen,** click on the **Manage My Expenses** button.
2. Complete the expense detail fields. You can even upload a copy of the receipt and, add notes for your records.
3. Once the expense has been added to the dashboard you can pay the expense, if desired.

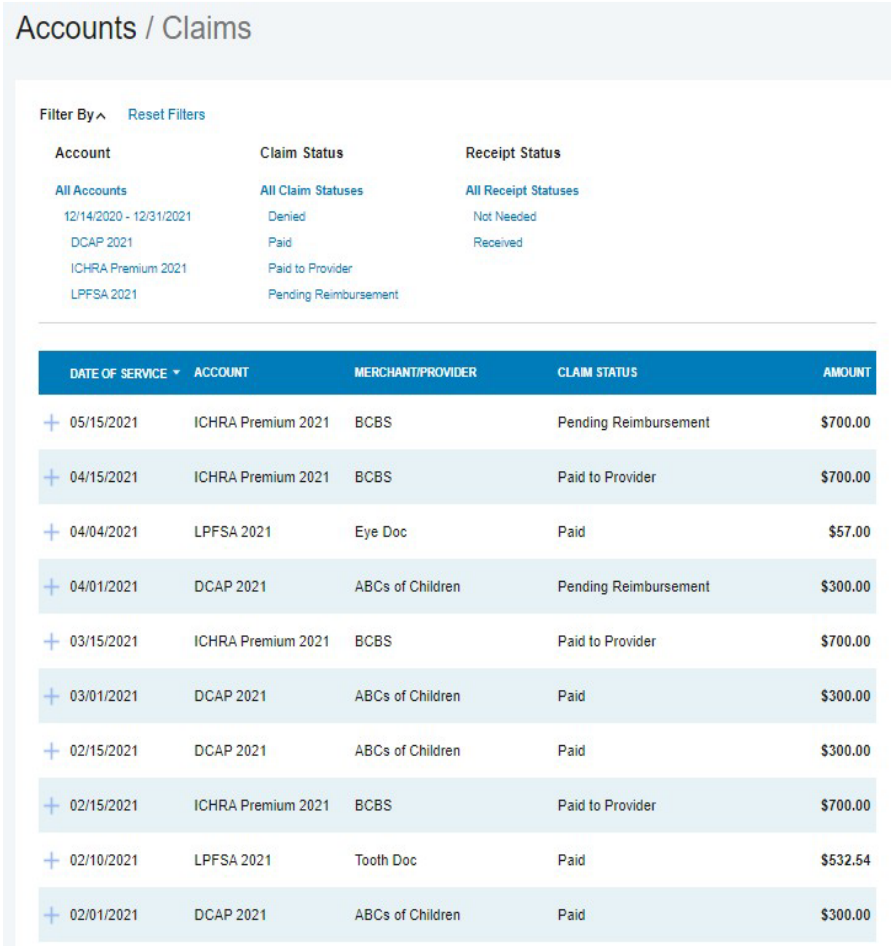


HOW DO I PAY AN EXPENSE?

1. You may process payments/ reimbursements for unpaid expenses directly from the **Manage My Expenses** page.
2. Expenses will be categorized, and **payment** canbe initiated for unpaid expenses by clicking onthe button to the to the right of the expense details.
3. Simply choose which expenses you would like paid and you will be presented with the eligible accounts from which you can initiate payment.
4. When you click **Pay,** the claim details from the **Expense** will be pre-populated within the claim form. Review & edit the claim details as needed.

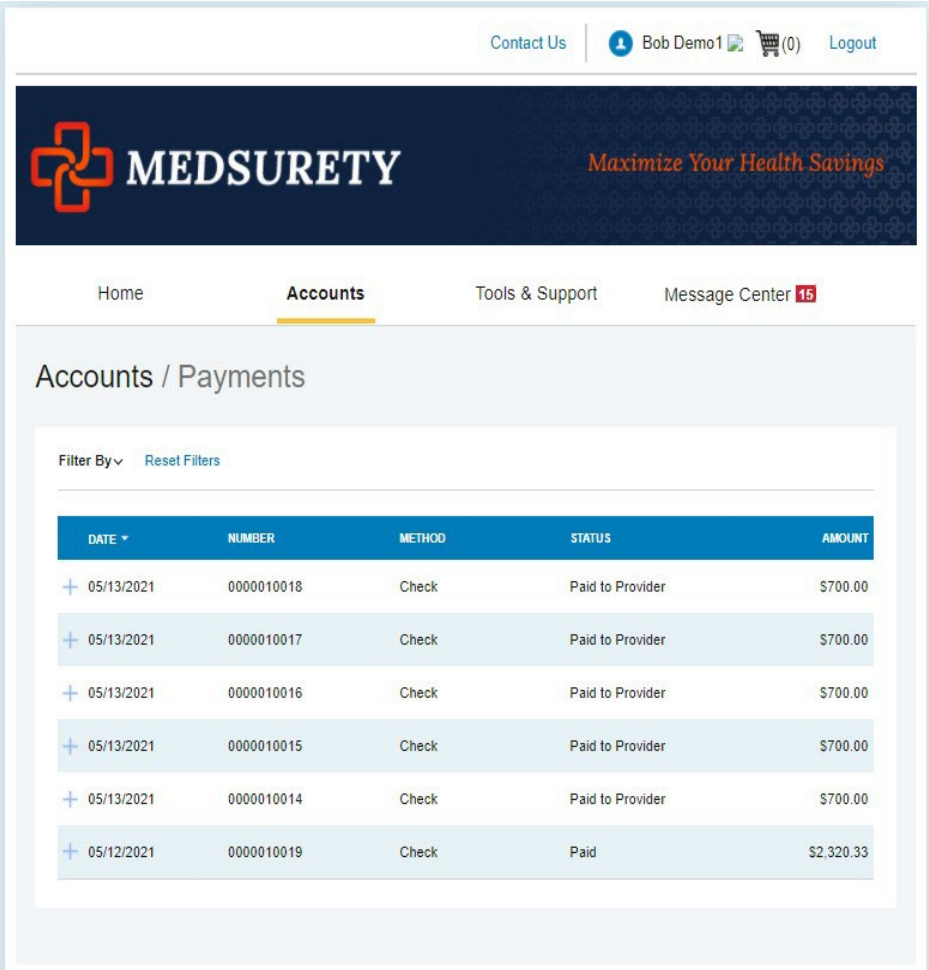
HOW DO I VIEW MY CLAIMS HISTORY AND STATUS?

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



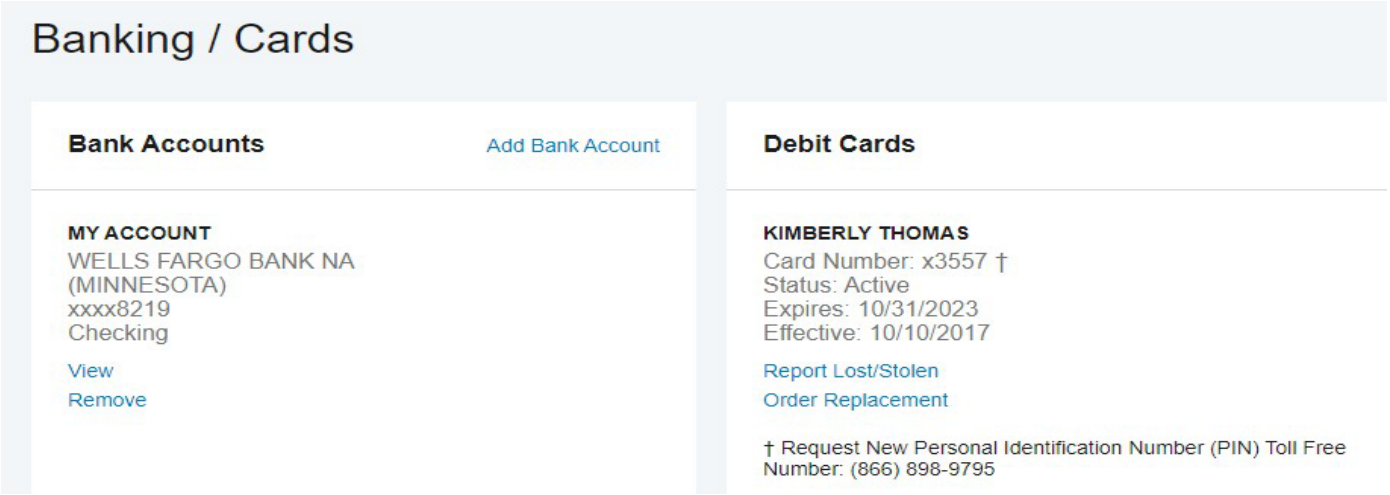
HOW DO I VIEW MY PAYMENT (REIMBURSEMENT) HISTORY?

1. From the **Home Page**, under the **Accounts**, 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.



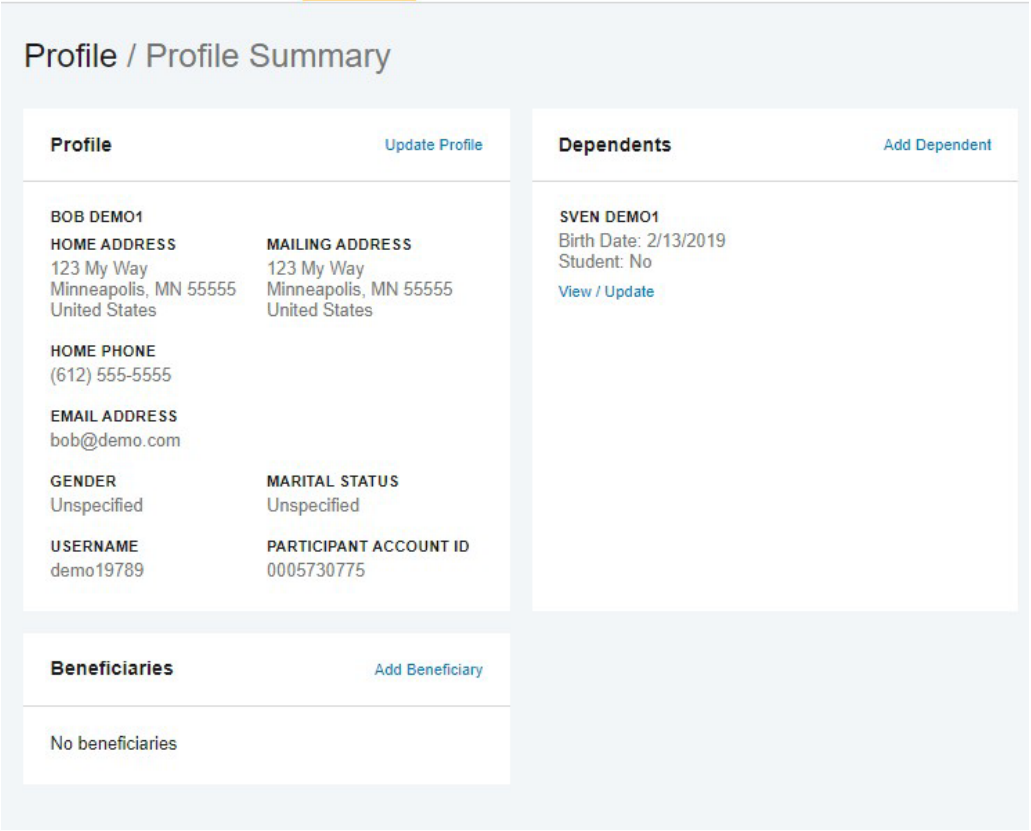
HOW DO I REPORT A DEBIT CARD MISSING AND/OR REQUEST A NEW CARD?

1. From the **Home Page**, under **Accounts/Profile**, click the **Banking/Cards** link.
    2. Under the Debit Cards column, click **Report Lost/Stolen** or **Order Replacement** and follow instructions.



HOW DO I UPDATE MY PERSONAL PROFILE?

1. From the **Home Page**, under **Accounts,** 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 reach out to customer service team such as address. This is a security feature.
3. Complete your changes in the form.
    4. Click **Submit**.

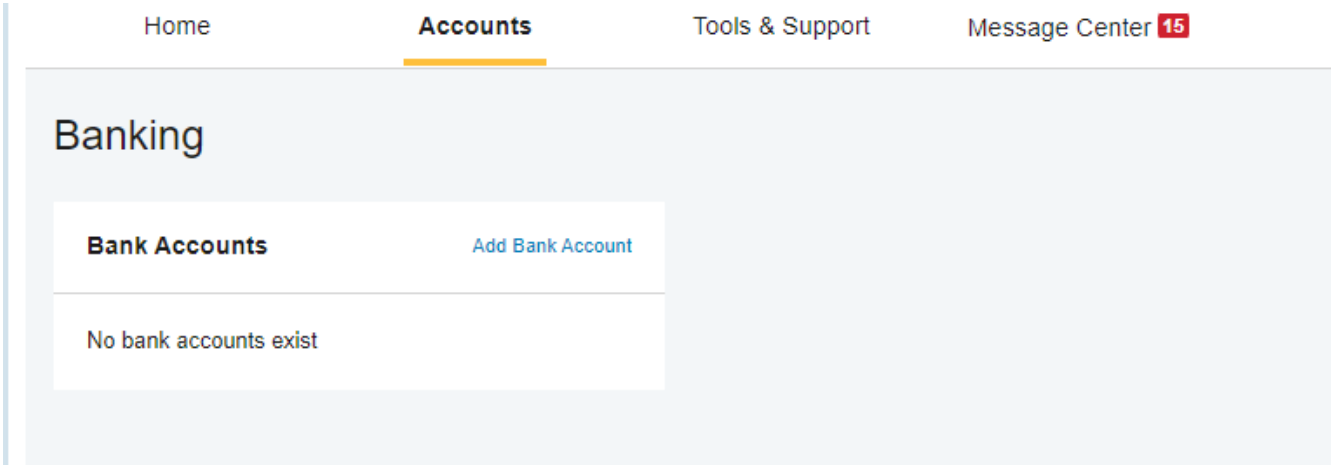


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HOW DO I GET MY REIMBURSEMENT FASTER?

The fastest way to get your money is to sign up online for direct deposit to your personal checking account. Under your Tasks section of your home screen, you should see a link that reads, "Get Your Money Faster". You can click on that link to be brought to the Banking/ Cards section of the portal to set up your direct deposit account. Otherwise, you can...

1. From the **Home Page**, under Accounts click on **Banking/Cards**
2. Click Add Bank Account
3. Enter your bank account information and click **Submit**.



HOW DO I CHANGE MY LOGIN AND/OR PASSWORD?

1. From the **Home Page**, Hover on Accounts, and click **Login Information**.
2. Follow instructions on the screen. (For a new account, the first time you log in, you will be prompted to change the password that was assigned by your plan administrator. Follow the instructions.)
3. Click **Save**.

HOW DO I VIEW OR ACCESS DOCUMENTS AND FORMS?

1. Click the **Tools & Support** tab along the top of the page.
2. Under **Documents & Forms** you will find any documents or forms you will need for your account(s).
3. Under **Plan Summaries** you will find plan descriptions for each plan your employer offers.
4. Under Rules & Agreements you will find the HSA terms and conditions documents that you will be asked to review and accept the first time you log in if you enroll on the HSA.
5. Under Contact Us you have quick access to our mailing address, and customer service contact information.
6. Under Quick Links, you have access to short educational videos related to CDH plans, Clever Rx and HealthShopper by Amazon.

