

Infinisource provides all Flexible Spending Account (FSA) and Health Reimbursement Arrangement (HRA) participants with an online portal that provides anytime access to view and manage account information. One of the many features available is the capability to review your account.

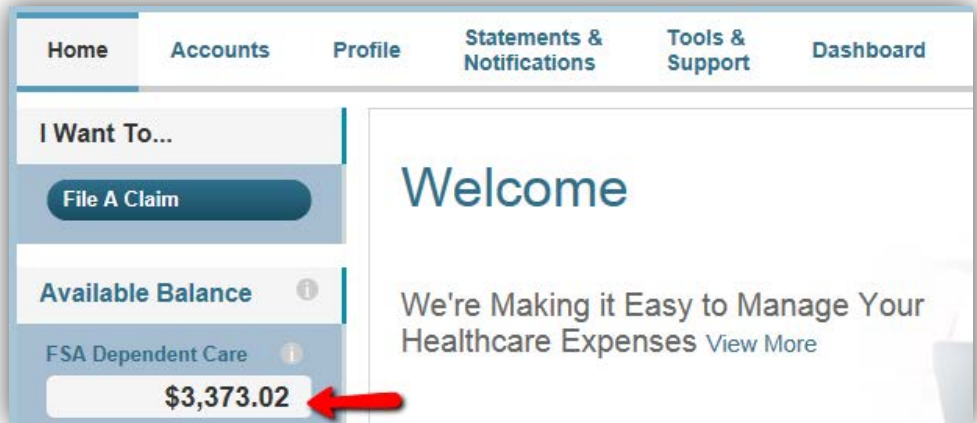
## Account Balance

To view your balance, follow these steps:

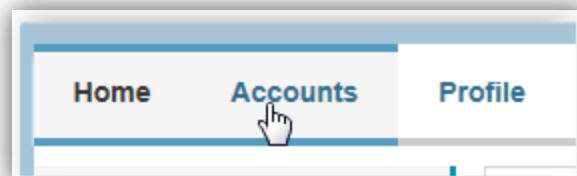
1. Navigate to the [Infinisource login page](#).
2. Enter your Username and Password. First time users will login using lower case first initial, last name and last four digits of your Social Security Number as both Username and Password.

3. On the **Home Page**, under **Available Balance** is the available amount for your account.

To review an Account Summary of your account(s) that includes current account balance(s), click on **Available Balance** or click Accounts on the top menu, it will take you directly to the **Account Summary**.



OR



Account Summary	<b>Accounts / Account Summary</b>						
<b>Account Activity</b>	The information displayed on the Account Summary page will vary depending upon your specific healthcare benefits. <a href="#">View More</a>						
<b>Claims</b>	<b>PY 2015</b>						Total Payroll Deductions: \$511.91 ▲
<b>Payments</b>	Account	Eligible Amount	Submitted Claims	Paid	Pending	Denied	Available Balance
	FSA Healthcare	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,000.00
	FSA Dependent Care	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,373.02
	Health Reimbursement	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,000.00
	Parking	\$4,750.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,204.39

The Account Summary page provides you with balance details and election details. This page displays all plan years you have been enrolled in by plan year name. If no plans are available the system will display the message “No accounts available”. Past plan years are collapsed, but can be expanded to see the details. Only active plans are automatically expanded, with the option to collapse.

<b>PY 2014</b>						Total Payroll Deductions: \$96.15 ▲
Account	Eligible Amount	Submitted Claims	Paid	Pending	Denied	Available Balance
FSA Healthcare	\$2,500.00	\$101.01	\$41.01	\$0.00	\$60.00	\$2,458.99
<b>PY 20141</b>						Total Payroll Deductions: \$60.00 ▲
Account	Eligible Amount	Submitted Claims	Paid	Pending	Denied	Available Balance
Parking	\$1,560.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,560.00
<b>PY 2013</b>						Total Payroll Deductions: \$96.15 ▼
<b>PY 2012</b>						Total Payroll Deductions: \$46.15 ▼

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

Your Election Summary Details are viewable for each plan year listed on your Account Summary page. Election summary details for a plan will display prior to initialization. However, balances will not display until when the plan year begins.

**Accounts / Account Summary**

The information displayed on the Account Summary page will vary depending upon your specific healthcare benefits.

**Health Savings Account**

Available Cash Balance	Investment Balance	Total Available Balance
\$0.00	\$0.00 <small>* Current as of 2/25/2015</small>	\$0.00

**2015 Plan Year** Total Payroll Deductions: \$326.92 ▲

Account	Eligible Amount	Submitted Claims	Paid	Pending	Denied	Available Balance
<b>Flex Spending Account</b>	\$1,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,500.00
<b>Election Details</b>	Effective: 1/1/2015 My Annual Election: \$1,500.00 Company Contribution to-date: \$0.00		My Contributions to Date: \$230.76 Estimated Payroll Deductions: \$57.69 Plan Year Balance: \$1,500.00			
Dependent Care FSA	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$769.24
HSA15	-	-	-	-	-	\$0.00
Individual Premium	\$1,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,500.00

**Expanded view display.**

**Accounts / Account Summary**

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

**Health Savings Account**

Available Cash Balance	Investment Balance	Total Available Balance
\$3,377.00	\$0.00 <small>* Current as of 2/25/2015</small>	\$3,377.00

**2016 Plan Year** Total Payroll Deductions: \$48.08 ▲

Account	Eligible Amount	Submitted Claims	Paid	Pending	Denied	Available Balance
<b>Flex Spending</b>	Your balances will be available when the plan year begins.					
<b>Election Details</b>	Effective: 1/1/2016 My Annual Election: \$2,500.00 Company Contribution to-date: \$0.00		Estimated Payroll Deductions: \$48.08 Plan Year Balance: \$2,500.00			
HRA	Your balances will be available when the plan year begins.					

**Future election details.**

## Account Activity

This page will provide you with your transaction summaries including pending and processed transactions.

First, chose the Account you want to view from the drop down box and click on "View":

### Account Activity

Account:	<a href="#">Health Reimbursement (1/1/2015 - 12/31/2015)</a> <a href="#">FSA Dependent Care (6/1/2014 - 12/31/2015)</a> <a href="#">FSA Healthcare (6/1/2014 - 12/31/2015)</a> <a href="#">Health Reimbursement (6/1/2014 - 12/31/2015)</a> <a href="#">Parking (6/1/2014 - 12/31/2015)</a> <a href="#">FSA Healthcare (1/1/2014 - 12/31/2014)</a> <a href="#">Parking (1/1/2014 - 12/31/2014)</a> <a href="#">FSA Healthcare (1/1/2013 - 12/31/2013)</a> <a href="#">Health Reimbursement (1/1/2013 - 12/31/2013)</a> <a href="#">FSA Healthcare (1/1/2012 - 12/31/2012)</a>	View
Activity Det		
No records		

When you click on an activity, it will open up the details:

6/26/2014	<a href="#">Denied Claim</a>	\$30.00	\$2,458.99		
6/26/2014	<a href="#">Denied Claim</a>	\$30.00	\$2,428.99		
6/24/2014	<a href="#">Claim Submission</a>	(\$30.00)	\$2,398.99		
6/24/2014	<a href="#">Claim Submission</a>	(\$30.00)	\$2,428.99		
6/20/2014	Payroll Deduction	\$96.15	--		

### Accounts / Claims

Date of Service ▼	Account	Merchant/Provider	Claim Status	Amount
06/15/2014	FSA Healthcare	-	Denied	<b>\$30.00 !</b>
06/15/2014	FSA Healthcare	-	Denied	<b>\$30.00</b>
01/01/2014	FSA Healthcare	-	Paid to Provider	<b>\$30.00</b>
01/01/2014	FSA Healthcare	-	Paid	<b>\$10.00</b>
01/01/2014	FSA Healthcare	-	Paid	<b>\$0.01</b>
01/01/2014	FSA Healthcare	-	Paid	<b>\$1.00</b>

## Claims

The Claims page provides you with a complete view of all your claims from all account on one page. The page displays your account, claim status, receipt status, claim summary level and details of your claim.

Date of Service	Account	Merchant/Provider	Claim Status	Amount
06/15/2014	FSA Healthcare	-	Denied	\$30.00 !
06/15/2014	FSA Healthcare	-	Denied	\$30.00
01/01/2014	FSA Healthcare	-	Paid to Provider	\$30.00
01/01/2014	FSA Healthcare	-	Paid	\$10.00
01/01/2014	FSA Healthcare	-	Paid	\$0.01
01/01/2014	FSA Healthcare	-	Paid	\$1.00

Click on any claim to view details.

## Accounts / Claims

Date of Service	Account	Merchant/Provider	Claim Status	Amount
06/15/2014	FSA Healthcare	-	Denied	\$30.00 !
06/15/2014	FSA Healthcare	-	Denied	\$30.00
01/01/2014	FSA Healthcare	-	Paid to Provider	\$30.00
01/01/2014	FSA Healthcare	-	Paid	\$10.00
01/01/2014	FSA Healthcare	-	Paid	\$0.01
01/01/2014	FSA Healthcare	-	Paid	\$1.00

Detail view of a claim

06/15/2014	FSA Healthcare	-	Denied	<b>\$30.00</b>
01/01/2014	FSA Healthcare	-	Paid to Provider	<b>\$30.00</b>
<b>Claim Details</b>				
Claim Number: ABC123140307C0000101		Date(s) of Service: 01/01/2014		
Recipient: -		Paid: \$30.00		
Payee: Sample				
Provider Account Number: 4A3377				
Address: 123 Sample Sample, ID 49000				
Source: Administrator				
Receipt Status: Received				
<a href="#">Upload Receipt(s)</a>		<a href="#">View Confirmation</a>		
01/01/2014	FSA Healthcare	-	Paid	<b>\$10.00</b>

<a href="#">Profile</a>	<a href="#">Statements &amp; Notifications</a>	<a href="#">Tools &amp; Support</a>	<a href="#">Dashboard</a>	
<b>Accounts / Claims</b>				
<b>Date of Service</b> ▾	<b>Account</b>	<b>Merchant/Provider</b>	<b>Claim Status</b>	<b>Amount</b>
03/01/2015	Flex Spending	-	Hold	<b>\$230.69</b>
02/28/2015	HRA	Dr Smith	Pending Receipt	<b>\$20.00 !</b>
02/15/2015	Flex Spending	-	Denied	<b>\$16.25 !</b>
<b>Claim Details</b>				
Claim Number: just2150305C0000101		Date(s) of Service: 02/15/2015		
Recipient: Tracey Zima		Denied: <b>\$16.25</b>		
Payee: Tracey Zima				
Source: Administrator				
Receipt Status: New Needed				
<a href="#">Upload Receipt(s)</a>		<a href="#">View Confirmation</a>		
06/04/2014	Flex Spending	Stillwater Medical Group	Paid	<b>\$25.00</b>

Headers are sortable.

Expanded claim details.

**Receipt Status**

- All Receipt Statuses
- ! Needed
- Required
- Overdue
- New Needed
- Not Needed
- Received
- Uploaded
- Less Options ▲

10/03/2013	Medical Flex	\$
10/01/2013	Medical Flex	T
09/23/2013	Medical Flex	T
09/21/2013	Medical Flex	T
08/03/2013	Medical Flex	-
08/01/2013	Medical Flex	-
08/01/2013	Medical Flex	-

Dynamic filter options.

Sort claims by Dynamic Filter Options:

**Note:** Click on the “Receipts Needed” link from the Message Center on your Home Page displays the Claims page and filters by Needed Receipt Status claims.

You can see when a receipt is needed from this page and click on the link to upload and view receipts.

01/01/2014	FSA Healthcare	-	Paid to Provider	\$30.00
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**Claim Details**

Claim Number: ABC123140307C0000101      Date(s) of Service: 01/01/2014

Recipient: -      Paid: \$30.00

Payee: Sample

Provider Account Number: 4A3377

Address: 123 Sample  
Sample, ID 49000

Source: Administrator

Receipt Status: Received

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[Upload Receipt\(s\)](#)      [View Confirmation](#)

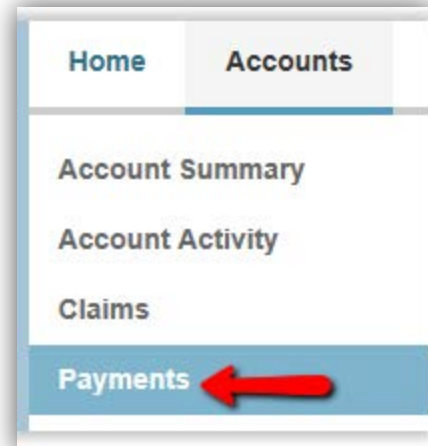
## Payments

The Payments page provides you with a complete view of all payment details on one page. This page will display when a payment when:

- Claims are posted for reimbursements
- Debit Card transactions are settled
- There are refunds from a Debit Card transaction

If there is no payment the message will displays as “There are no records to display”.

To view details, click on the Payment link item.

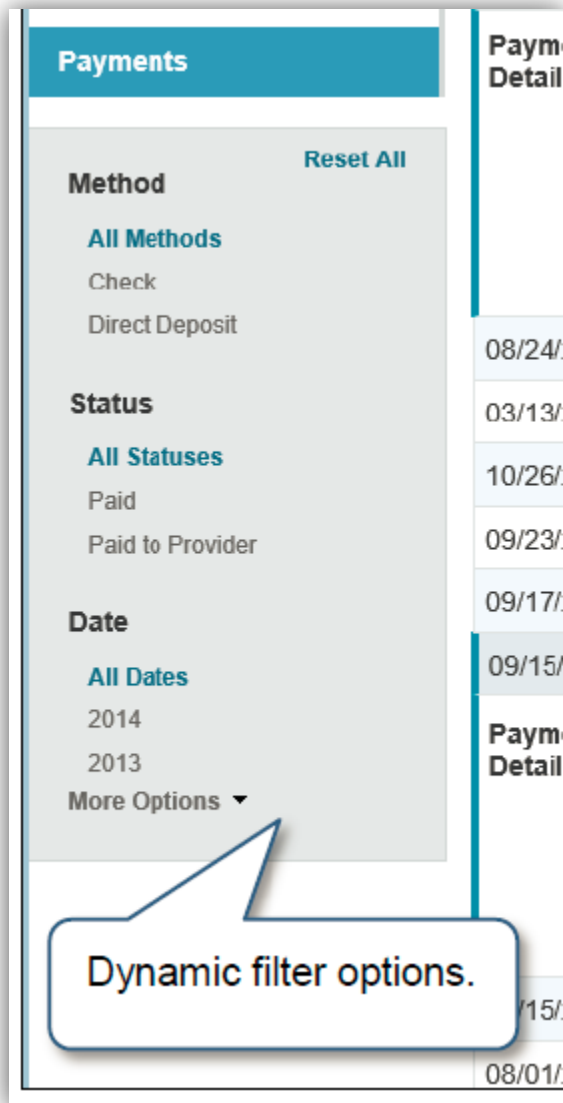


Accounts / Payments				
Date ▾	Number	Method	Status	Amount
11/20/2014	0000001092	Check	Void Provider Check	\$30.00
11/20/2014	0000001090	Check	Void Provider Check	\$30.00
			Void Provider	

Accounts / Payments				
Date ▾	Number	Method	Status	Amount
11/20/2014	0000001092	Check	Void Provider Check	\$30.00
<b>Payment Details</b>	Account: FSA Healthcare Type: Claim Reimbursement		Date of Service: 01/01/2014 Claim Amount: <b>\$30.00</b> Payment Amount: \$30.00	
			<b>Total Payment Amount: \$30.00</b>	

You can filter your information on this page by method, status or date.





Remember, you can now **go mobile** by using your smart phone to access:

- FSA Account balances
- Submit claims for reimbursement
- Send receipts using a mobile device's camera
- Configure alerts via text message

Easily check information now using an iPhone, iPod Touch, iPad or Android-powered device.

