Consumer Portal Quick Start Guide

Welcome to your Infinisource Benefits Accounts Consumer Portal. This portal gives you anytime access to view information and manage your account.

It enables you to:

- File a claim online
- Upload receipts
- View up-to-minute account balances
- View your account activity, claim history and payment (reimbursement) history
- Update your personal profile information
- Change your login ID and/or password
- Download plan information, forms and notifications

Note: If your employer is providing you with the Infinisource prepaid Benefit Card, please review the following information.

Since you've enrolled in the Flexible Spending Account you may be receiving two prepaid benefit cards at your home address for you and your family members to use. The cards will arrive in a special envelope that looks like this – so please don't throw it out!

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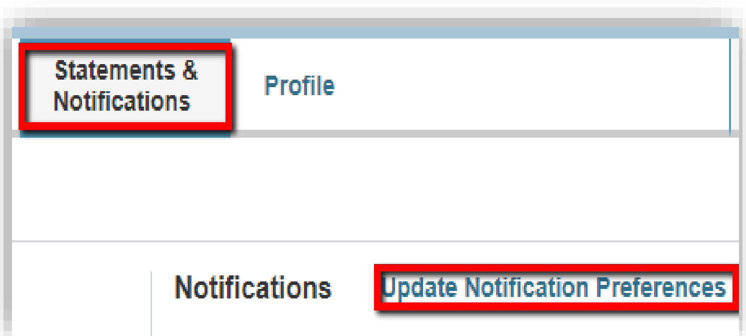
With the card, you don’t have to pay cash up front, file claims and wait for reimbursement. Accessing your account is …

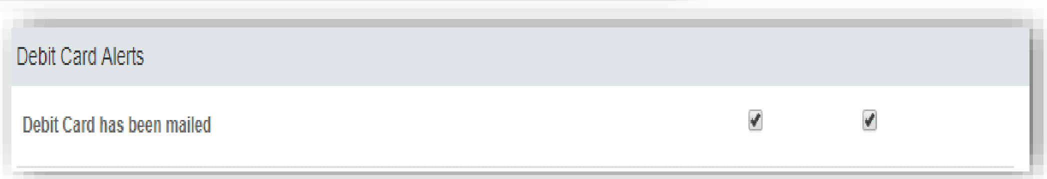
- Easy – a simple swipe of the card makes it hassle free!
- Automatic – funds are immediately transferred from your FSA at the time you incur the expenses
- Convenient – there are no manual claim forms to submit
- Simple to track – your current balance is available 24/7 at www.infinisource.com

Note: The Benefit Card expires after five years. There is a $5.00 replacement fee if the card is destroyed prior to the expiration date, lost/stolen, additional cards requested or not received.

Participants frequently contact Infinisource requesting information on when their debit card will be mailed to them. Participants now have the ability to set up to receive a text message when their debit card is mailed.



To add this feature, participants will access the Participant Online Portal (see below for more information for first-time users logging into the site), select **Statements and Notifications**, **Update Notification Preference** and check the box to receive alerts under **Debit Card Alerts**.

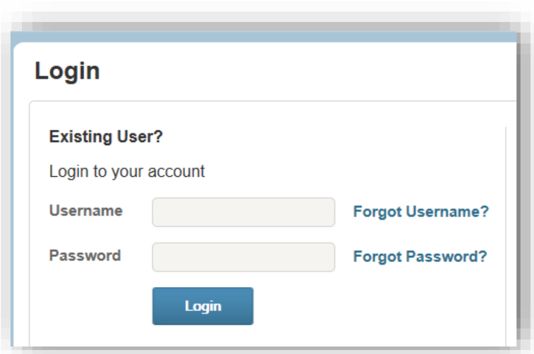


Participants can also set up to receive a text message for claim information including when it has been filed, processed or denied.

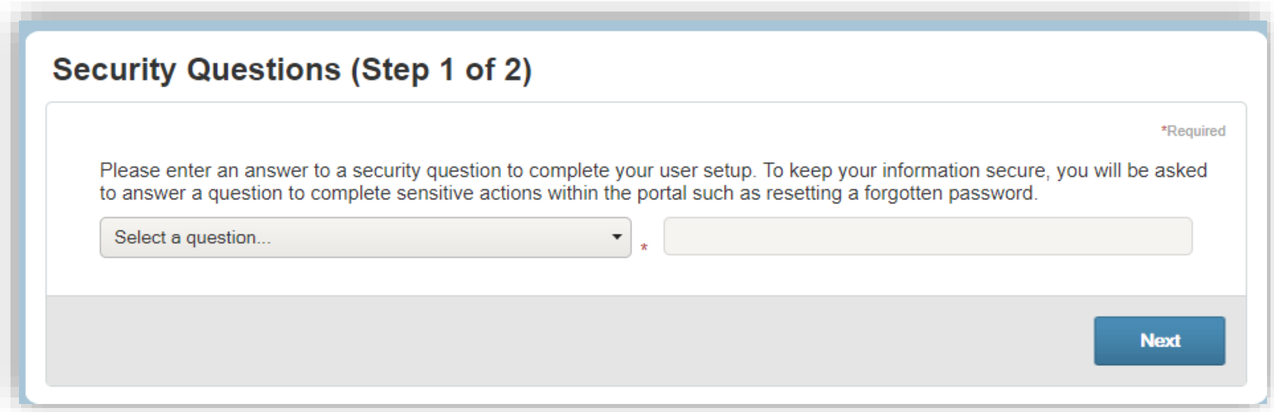
To login to your home page, follow these steps:

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.

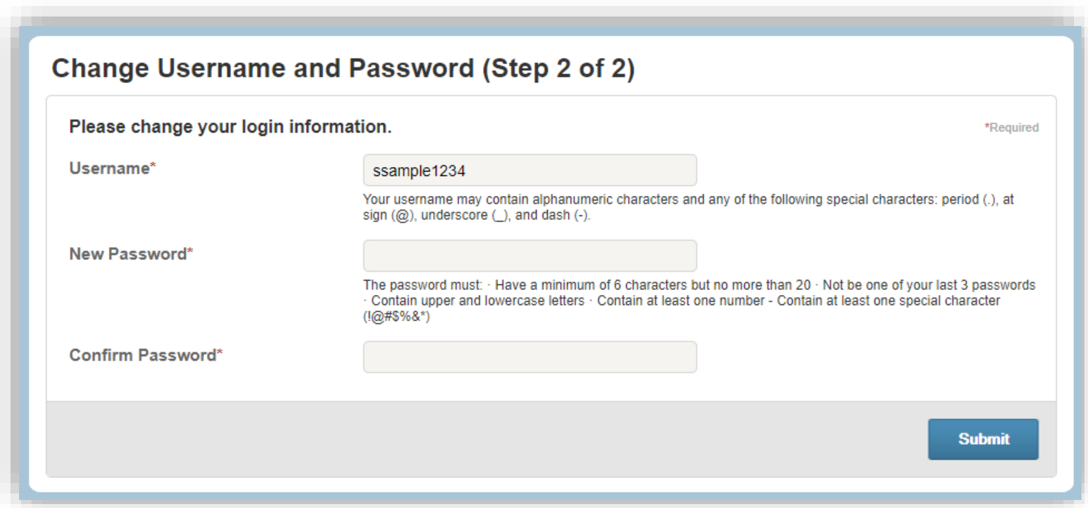


3. You will be prompted to **answer security questions** when you login and change your username and password. (You will only be asked these questions upon logging in to the website the first time.) Answers to security questions are case sensitive.



4. Set up your **Username** and new **Password**.
Your username may contain alphanumeric characters and any of these special characters: period (.), at sign (@), underscore (_) and dash (-).

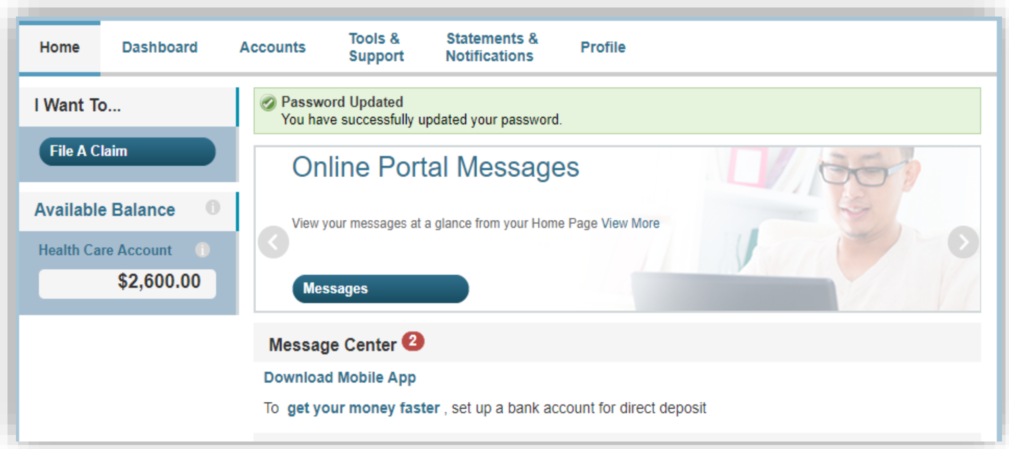
Your password must have a minimum of six characters, not be one of your last three passwords, contain at least one upper and lowercase letter, contain at least one number and at least one special symbol (-+=!@#$%^&*_).

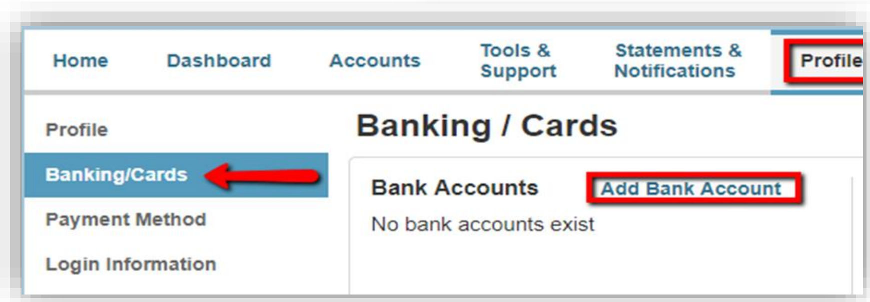


The **Home Page** is easy to navigate:

- The top section shows messages from your employer and links to employee information.
- The **Message Center** section displays alerts and relevant links to keep current on your accounts.
- The **Available Balance** section has a link to account balances and activity details.

- **File a claim** directly from the Home Page.
- **Get your money faster** (direct deposit), under Message Center click on **get your money faster**. This will direct you to enter your bank information and click submit.

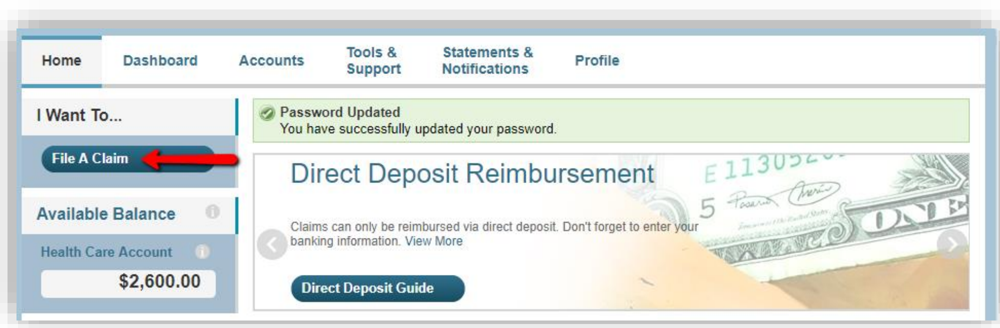




How do I file a claim and upload documentation?

- Important: Itemized receipts or an Explanation of Benefits (EOB) is required. Charge slips or check copies are not eligible documentation.
- Claims can be submitted online or via the Mobile App for iPhone and Androids.

1. On the Home page, click **File a Claim**.



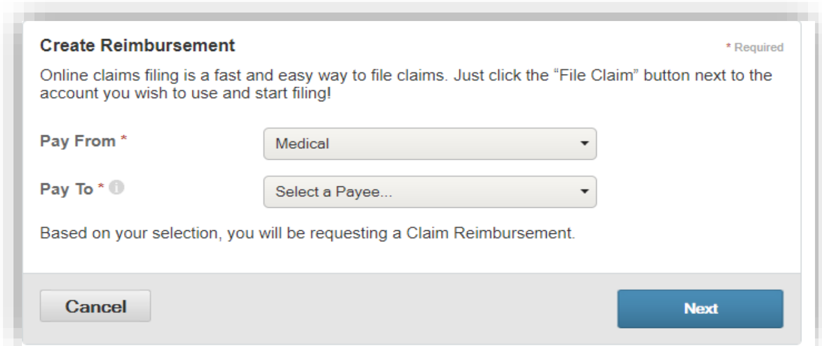
2. Chose the **Pay From and Pay To,** from the drop down box in which you are filing a claim. Select **Next.**

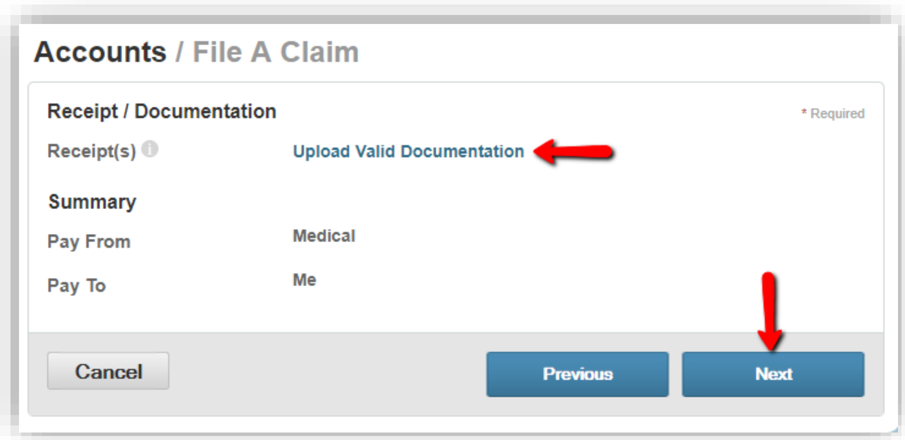
3. Upload your receipt. (When uploading a receipt it must be in .doc, PDF, bmp or gif format.)

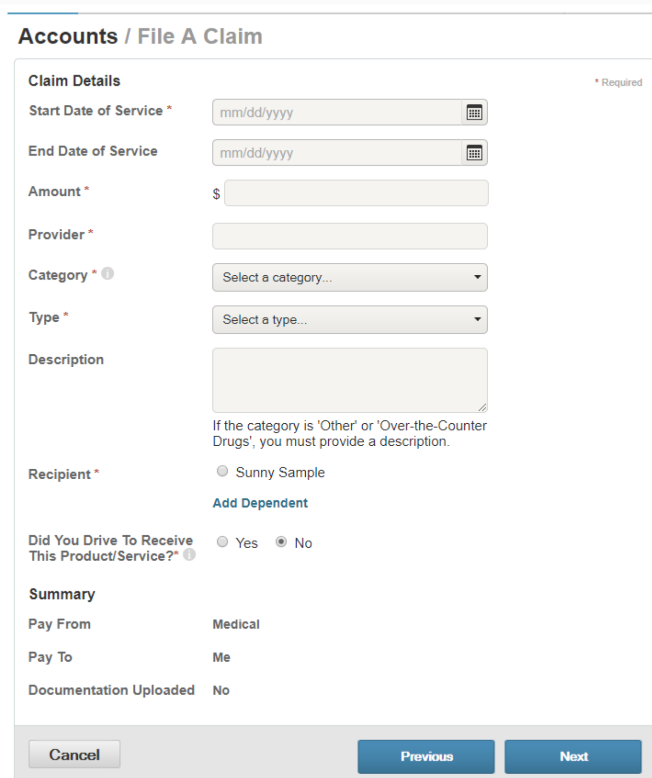
4. Enter your claim information on the form that appears and click **Next**. The claim will be added to the **Claims Basket**.

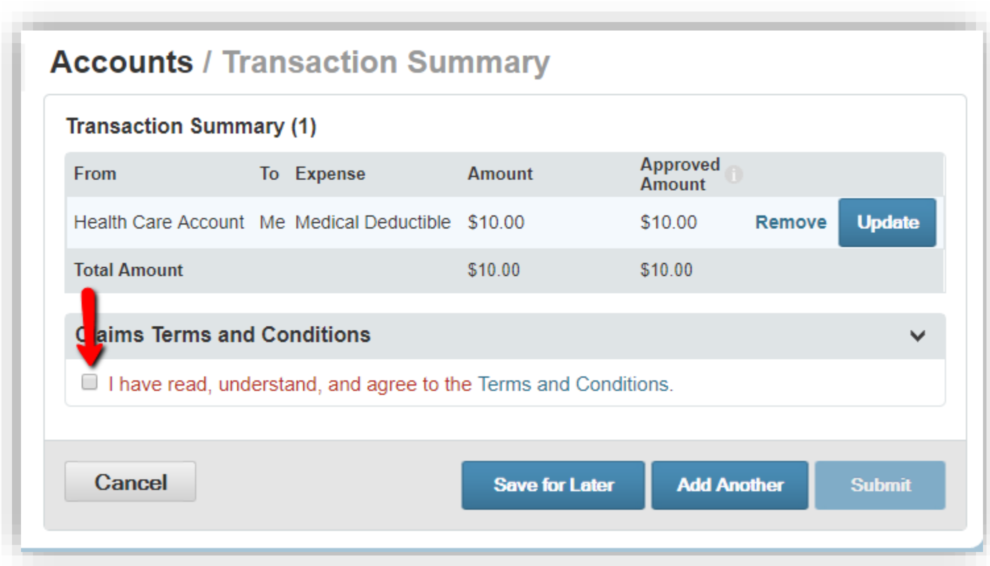
To submit more than one claim, click **Add Another**, select the plan and complete the form and click **Next**.

4. When all claims are entered in the **Claims Basket, check the box** next to *I have read and agree to Terms and Conditions*. Click **Submit** to send the claims for processing.



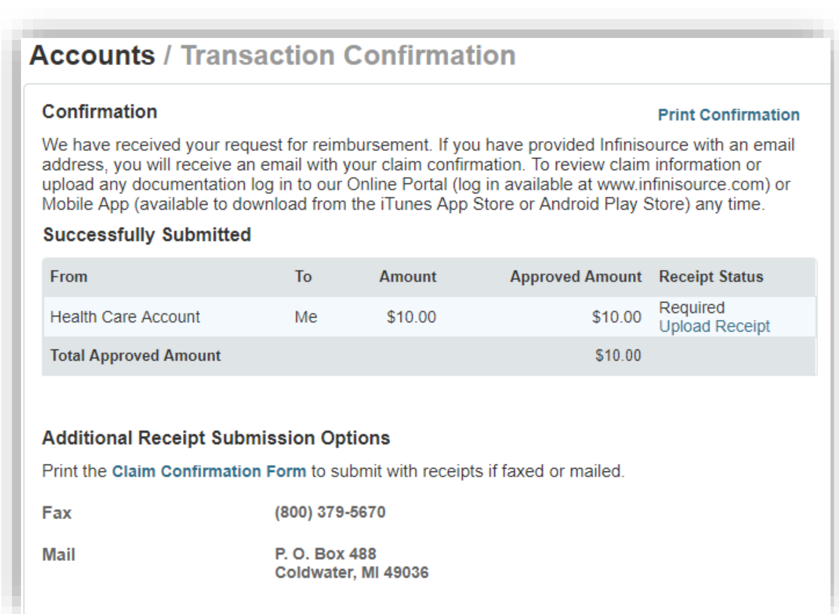






5. The **Claim Confirmation** page will display. Print the Claim Confirmation Form as a record of your submission. If you did not upload your receipt, print another Claim Confirmation Form, attach the required receipts and submit to the administrator. If a receipt is required, you will see the **Upload Receipt** link. Click on it and the **Receipts Needed** screen displays.

Note: If you see Receipts Needed link in the Message Center section of your Home Page, click on it. A listing of the claims requiring receipts will appear.



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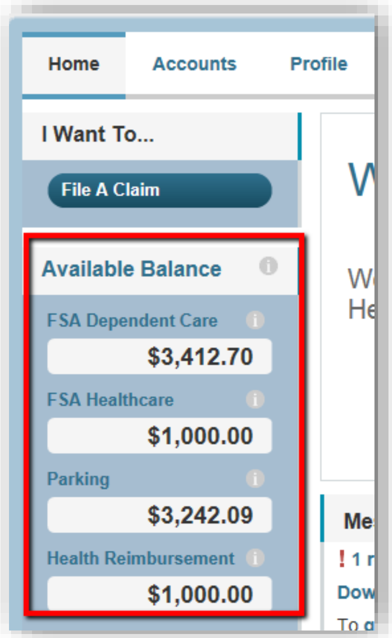
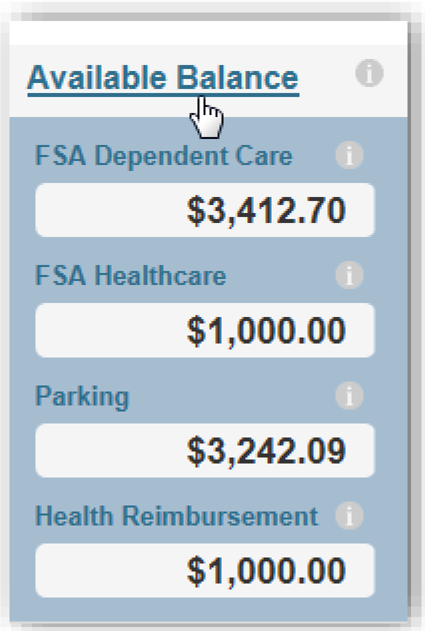
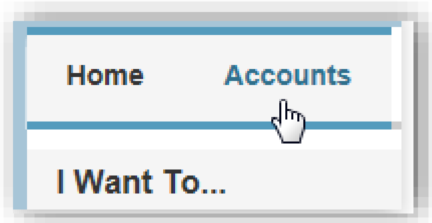
How do I view current account balance and activity?

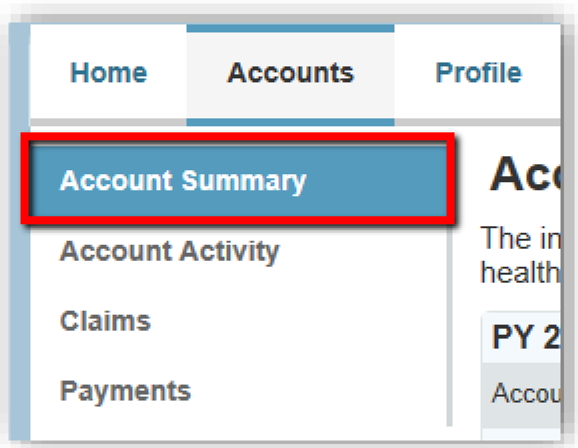
1. For the current Account Balance only, on the **Home Page**, under **Available Balance** shows the available amount next to the applicable account.



2. For an Account Summary of your account(s) that includes current Account Balance(s), click on <u>**Available Balance**</u> link or click on the **Accounts** link on the top menu, which will take you to **Account Summary**.







3. On your iPhone/Android, download the iFlex app and view your account information.

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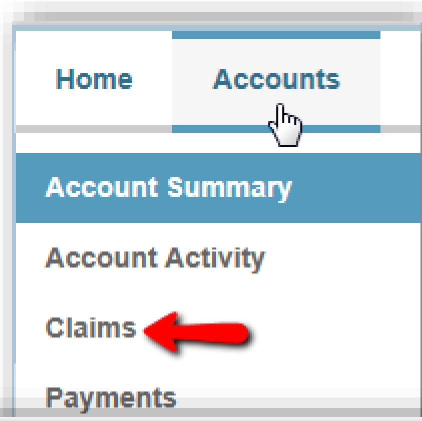
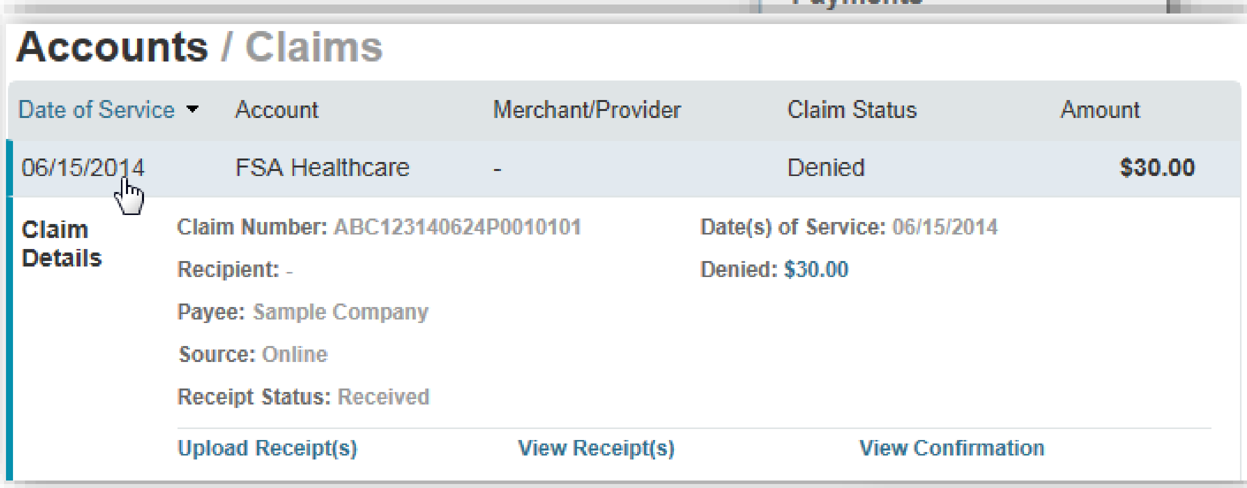
How do I view my claims history?

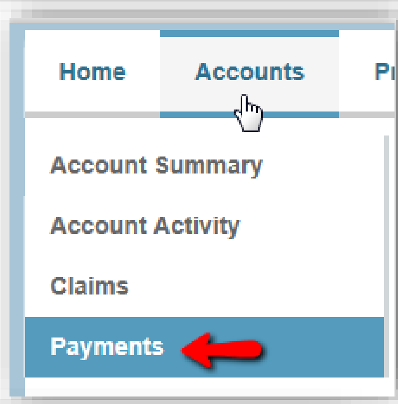
1. On the **Home Page**, click on **Accounts**,
   - **a.** Click **Claims**
   - **b.** Click on any claim to view more details

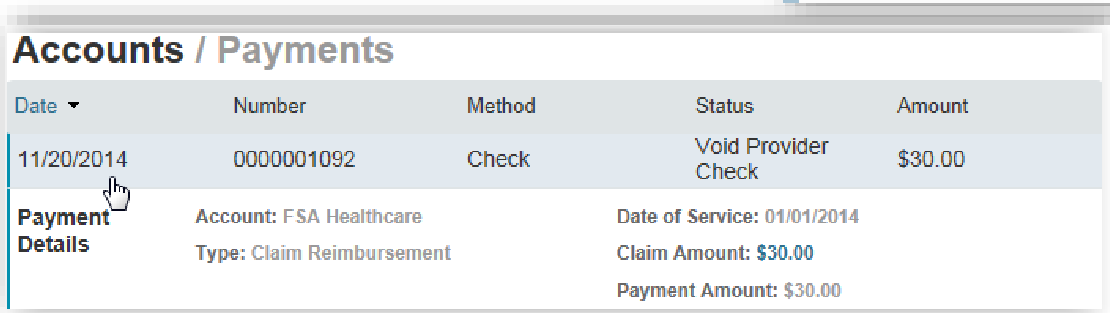




How do I view my payment (reimbursement) history?

1. On the **Home Page**, click on **Accounts**, then on the left menu click on **Payments**. You will see reimbursement payments made to date, including debit card transactions.
2. Click on any claim to see claim details.





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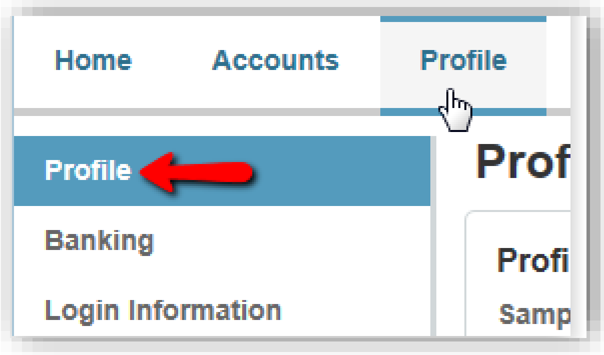
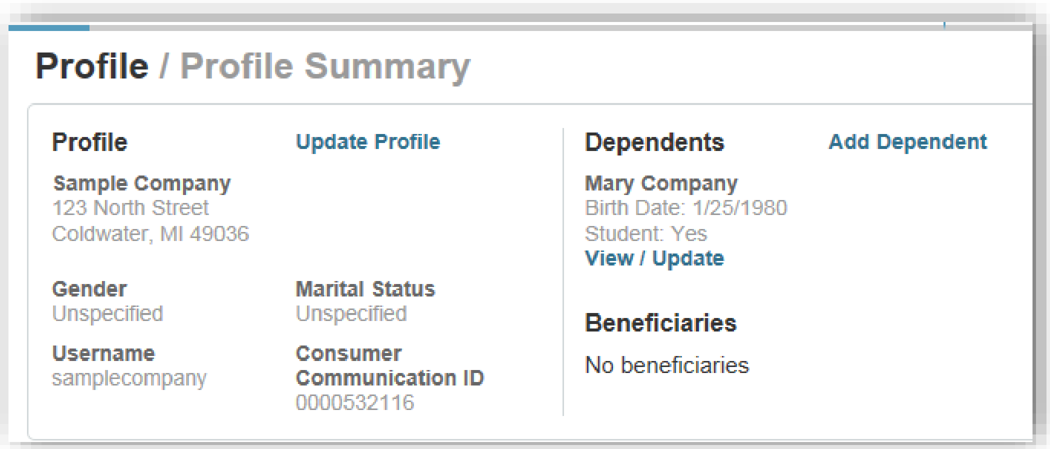
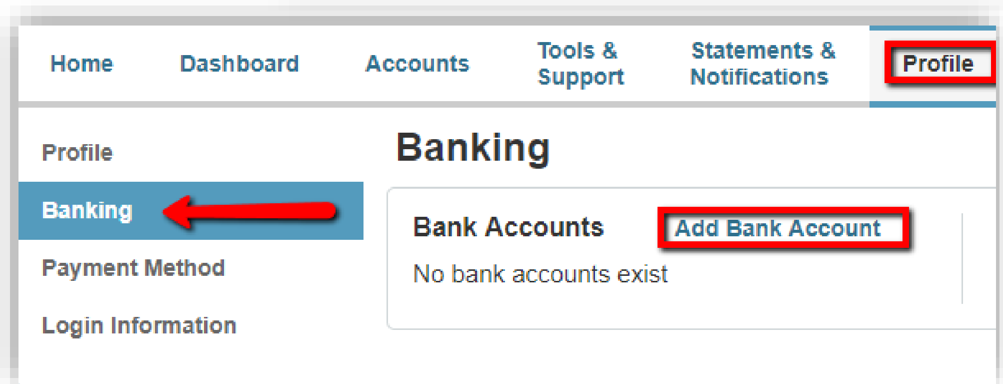
How do I update my personal profile?

1. On the **Home Page**, click on **Profile**, chose either **Profile** or **Banking** from the left menu.
2. Under **Profile**: Click on **Update Profile** or **Add/Update Dependent**
3. Under **Banking,** click on Add Bank Account
4. Some profile changes will require you to answer an additional security question.
5. Complete your changes in the form.
6. Click **Submit.**







How do I change my login and/or password?

1. On the **Home Page**, click on **Profile**, click on **Login Information** from the left menu.
2. You can change your password, username or security questions from this area
3. Follow the 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.)

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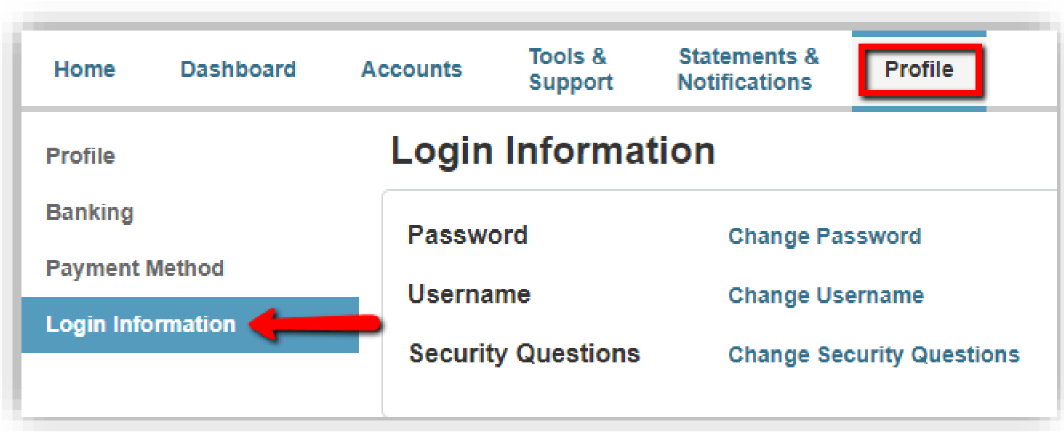
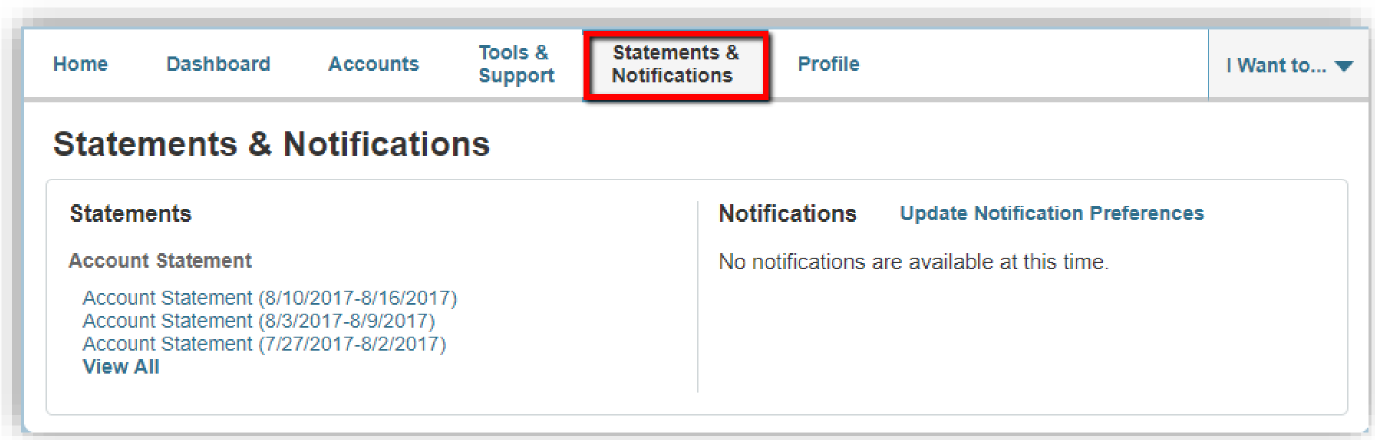


How do I view or access...

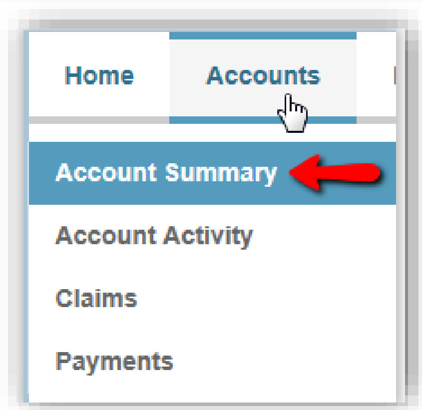
Statements and Notifications

1. On the **Home Page**, click on **Statements & Notifications** from top menu
2. Click any link of your choice: **Account Statements, Advice of Deposits, Denial Letters, Denial Letters with Repayments or Receipt Reminder** are a few options**.**



Plan information

1. On the **Home Page**, click on **Accounts** from top menu then **Account Summary** from the left menu.
2. Click on the applicable account
3. **Plan Rules** open in another browser



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Account	Eligible Amount	Submitted Claims
FSA Healthcare	$1,000.00	$0.00
FSA Dependent Care	$5,000.00	$0.00

Questions?
Contact Infinisource Customer Service Representatives at 866-370-3040 or email at fsa@infinisource.com.