



# TAG Member Portal

Simplify your healthcare finances with convenient, online access to your tax-advantaged benefit account

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## Getting started

The TAG Member Portal can be accessed by visiting the following URL:

- [enrollwithtag.wealthcareportal.com](http://enrollwithtag.wealthcareportal.com)

### Registration

- **Step 1:** If this is your first time accessing the TAG Member Portal, click the *register* button atop the right corner of the home screen.
- **Step 2:** Complete the registration form (as shown in the images on the right).
- **Step 3:** If you do not have a debit card, you will need to enter your Employer ID. If you do not know your Employee ID, please email us at [support@enrollwithtag.com](mailto:support@enrollwithtag.com)
- **Step 4:** Create your username, email, and password

STEP 1 STEP 2 STEP 3 STEP 4 STEP 5 STEP 6

Let's get you registered - please provide the information below.

First Name \*

Last Name \*

Zip Code \*

Debit Card \*

I don't have a debit card

STEP 1 STEP 2 STEP 3 STEP 4 STEP 5 STEP 6

Enter your employer information and we'll securely retrieve your information!

Employer ID \*

Employee ID \*

To register with this site, you must have an **Employee ID** which could be your Health Plan Member Number, Social Security Number, an ID provided by your Employer or an alternate ID created by your Administrator, and a **Registration ID** which could be your Benefit Debit Card Number or your Employer.

If you do not know your ID or were not provided an ID, please contact your Administrator.

required

### Secure authentication

The next phase of registration involves setting up your secure authentication. This crucial step helps ensure your account is secure and private.

After the registration form is successfully completed, you will be prompted to complete the secure authentication setup process.

- **Step 1.** Select your security questions. From the list, please select four security questions and provide your answers. These questions will be randomly asked during subsequent logins to ensure security. When finished, click *next*.
- **Step 2.** Verify your email address.

On the next page, you will be prompted to verify your email. Click *next*.

Register - Secure Authentication

STEP 1 > STEP 2 > STEP 3 > STEP 4 > **STEP 5** > STEP 6

First Name

Last Name

 Confirm Email \*

required

 The email address entered is used for security encryption only. It is not used for solicitation purposes.

 CANCEL  NEXT

- **Step 3.** Submit setup information. On the next page, you'll be asked to verify the information you entered during the secure authentication process. After you've reviewed and confirmed the accuracy of this information, click *submit setup information*.

A confirmation page will display the successful completion of your registration.

### Your first login

Once registered, you will be able to enter your username, answer security questions, and enter your password on all subsequent login attempts.

## Checking your account balance(s)

Navigate to the *benefit account summary* page to access a quick view of your account balance(s). Each of your accounts displays in its own box, and provides at-a-glance details regarding your balance, funds spent, and important dates.

The screenshot shows the 'Flexible Spending Account' summary for the period 01/01/2016-12/31/2016. It features a donut chart for the account balance and a table for the account summary. Callouts provide context for various elements:

- Account Balance:** A donut chart showing a total of \$1,456.00. A red segment represents the available balance (\$589.49), and a blue segment represents the amount spent (\$866.51).
- Account Summary Table:**

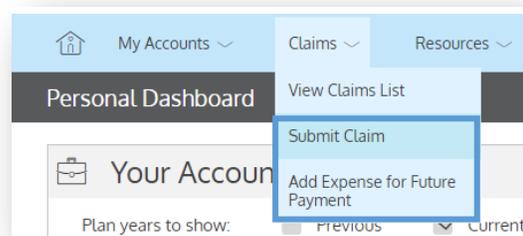
Annual Election	\$1,456. <sup>00</sup>
Payroll Deposits YTD	\$1,568. <sup>99</sup>
Spent	(\$866. <sup>51</sup> )
Balance	\$589. <sup>49</sup>
- Deadlines:** A section listing key dates: Plan Start (Jan 1, 2016), Plan End (Dec 31, 2016), Last Day to Submit Claims (Mar 31, 2017), and Last Day for Spending (Dec 31, 2016).
- Navigation:** Buttons for 'VIEW DETAILS', 'TRANSACTIONS', and 'SUBMIT CLAIM' are located at the bottom.

## Submitting expenses and filing claims

The TAG Member Portal allows you to enter new claims and expenses, as well as view and edit pending claims. If you have receipts or documentation to substantiate your claim, you can attach these to expedite the reimbursement process.

What is the difference between a claim and expense?

- **Claim.** Claims are simply reimbursement requests submitted for costs incurred when receiving eligible services, products, or procedures.
- **Expense.** Expenses are used to track & manage your medical, dental, vision, prescription, and other potentially eligible expenses. Expenses can be manually entered by you, or can also be automated fed into your profile via electronic data feeds from your insurance carrier. Once entered, expenses can be submitted for reimbursement (just like a claim). Expenses can be submitted now or later.



## Submitting a claim

To enter a claim and request reimbursement, navigate to the *add claim* page (by clicking *submit claim* or via the menu bar) and complete the form. Be sure to upload a receipt image if you have one. You can click *browse* to navigate to the file, or you can drag and drop from your computer. Click *submit* to send the request for processing.

Add Claim

\* - Required Field

 Claimant

 Reimbursement Method

 Service Start Date \*

 Service End Date \*

 Service Type \*

 Claim Amount \*

 Would you like to submit this as a recurring payment?

Yes  No

 Provider Name

 Comments

 Upload Receipt \*

 DRAG & DROP  
your receipts here

## Adding an expense for future payment

Similar to claim submission, to enter an expense, open the *add expense for future payment* page and complete the form. Be sure to include a receipt, if you have one.

- **Amount your provider charged.** Full amount billed for services provider.
- **Insurance allowed amount.** The maximum amount your health insurance plan will pay for services provided.
- **Amount covered by insurance.** The amount covered by your health insurance plan.
- **Amount you paid out-of-pocket.** The cost included in the insurance allowed amount that are for ineligible items or services.
- **My responsibility.** Any part of the insurance allowed amount that is not covered by your health insurance plan.
- **Reimbursed from my accounts.** The amount reimbursed from your benefit accounts.
- **My remaining responsibility.** The remaining amount you can submit for reimbursement.

## Viewing claims and expenses

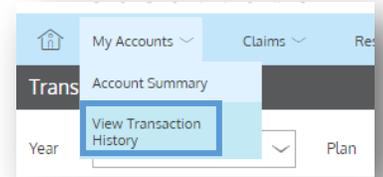
Once entered, claims and expenses can be viewed on the *claims list* page. From here, you can view claim status, attach receipts, and request reimbursement for eligible expenses.

Action Needed			
\$100.00	Eligible for Reimbursement	Claim Date of Service: Oct 26, 2016	REQUEST REIMBURSEMENT
Approved/Paid/Submitted			
(\$32.99)	Paid	Claim Date of Service: Nov 4, 2016 Date of Transaction: Nov 9, 2016	
(\$43.99)	Paid	Claim Date of Service: Nov 2, 2016 Date of Transaction: Nov 9, 2016	
(\$54.00)	Paid	Claim Date of Service: Nov 9, 2016 Date of Transaction: Nov 9, 2016	
(\$8.00)	Paid	Claim Date of Service: Nov 7, 2016 Date of Transaction: Nov 9, 2016	
\$100.00	Submitted	Claim Date of Service: Oct 26, 2016	ADD RECEIPT
Page 1 of 1			
Denied			
\$34.00	Denied	Claim Date of Service: Nov 9, 2016 Date of Transaction: Nov 9, 2016	

## Resolving pending debit card transactions

If you swipe your debit card for eligible products or services, you may be required to submit a receipt or other documentation before the debit card transaction can be approved. To aid in resolving pending debit card transactions, you can take the following action:

- **Step 1.** Navigate to the *transactions* page.
- **Step 2.** Located the pending transaction (using the search filters)
- **Step 3.** Click to expand the transaction, and click *add receipt* to attach your supporting documentation to the transaction.



We will review the documentation you've submitted and update the transaction accordingly.

Year: 2017 Plan: Dependent Care FSA (Curr) Type: All

Which transactions do you want to see? Select here

Approved/Posted  Pending/Processing  Denied

SEARCH FOR TRANSACTIONS

(\$40.00)	Dependent Care FSA Pending	Card	Feb 27, 2017	
Date Of Service	Feb 27, 2017	RECEIPTS		
Description	DR. SMITH	No receipts to display.		
Claimant	NewApp Two			
Account Type	DCA			
Plan Start Date	Jan 1, 2017			
Plan End Date	Dec 31, 2017			
Merchant Name	DR. SMITH			

## Updating your user profile

To access and edit your user profile, click the username hyperlink on the right side of the navigation bar. From this page, you can:

1. Update your phone number and address
2. Change your password
3. Update your reimbursement method
4. Add a new dependent
5. Update or remove an existing dependent



The image below shows where each item in the list above is located.

**Profile Information:**

- Name: NewApp Two
- Date of Birth: Jan 1, 1950
- Employee ID: \*\*\*\*\*P002
- Marital Status: None
- Gender: None

**Contact Information:**

- Phone: 555-444-1234
- Email Address: [edit](#) [delete](#) ksmith@email.com

**Addresses:**

- Address: 1 Main Street, Beverly, MA, 00000, US
- Alternate Address: 40 Elm St, Orlando, FL, 32801, US

**Employer & Reimbursement:**

- Employer: New Mobile App One
- SSN: XXX-XX-5678
- Employee Status: New
- Reimbursement Method: Direct Deposit (edit 3)
- Bank: Eastern Bank
- Account Number: \*\*\*\*2356
- Routing Number: \*\*\*\*1798
- Checking

**Family Members:**

- Spouse: NewApp Two (Spouse Or Common Law Spouse)
- Date of Birth: Mar 3, 1975
- SSN: \*\*\*\*\*1555
- Address: 1 Main Street, Beverly, 00000, US
- EDIT DEPENDENT (5)

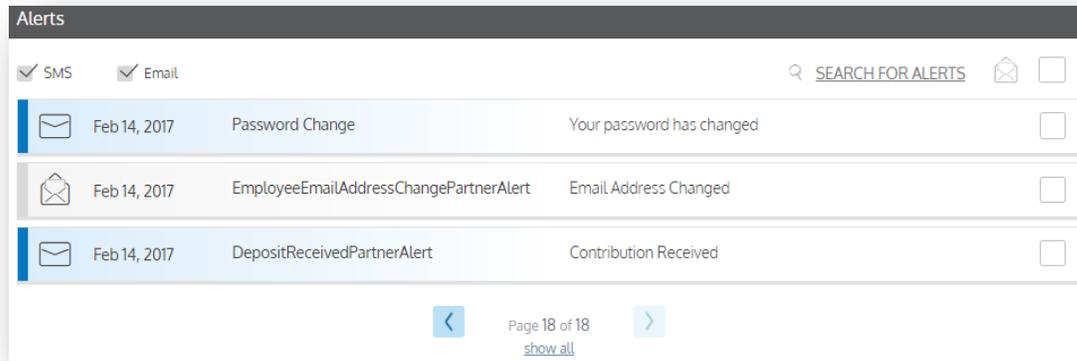
**Actions:**

- EDIT PROFILE (1)
- change password (2)
- ADD FAMILY MEMBER (4)

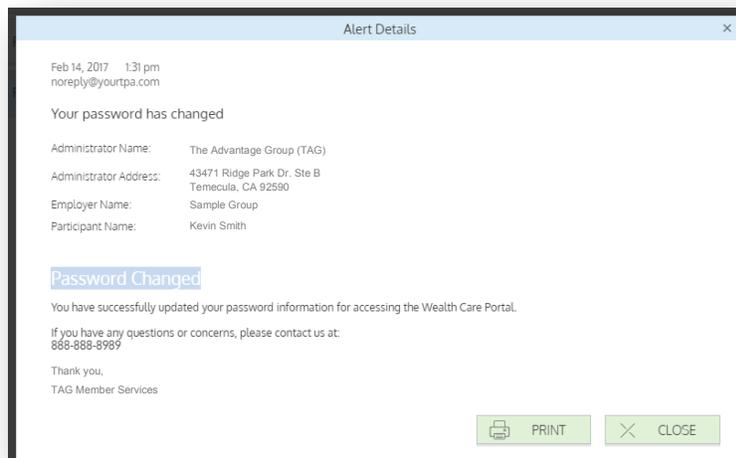
## Managing alerts & messages

The bell icon in the navigation bar indicates when you have unread alerts awaiting your review. Depending on your communication preferences and your group's setup, these alerts could be anything from confirmation of an email address or password change, to notification that a claim you submitted has been received, to an alert that a card transaction was denied, to a wide variety of other communication types.





Click on an individual message to see the full text:



### Changing your alert preferences

You can change whether you receive certain alert types, as well as how you receive them from the *communication settings* page. This page can be accessed by clicking the sprocket symbol in the navigation bar.

You may choose, for each alert type, whether you receive it via mobile, email, both, or neither. Click *save* when you are done editing your preferences. You can also use this page to update your email address, and to register your mobile phone for SMS text alerts.



### Assigned Notifications

The notifications below are available to you. Please define the delivery method for these notifications. If mobile number and/or email is not an available delivery method, please **make sure you have an active email address and registered mobile number** listed on the right.

	mobile	email	both	none
Account Balance Alert	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Account Deductible Met	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Billing Address Change	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Card Mailed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Card Transaction Approved	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Card Transaction Denied	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Completed HSA Payment Notice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Deposit Received	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enrollee Welcome Email	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Failed HSA Payment Notice	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Manual Claim Entered	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Password Change	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Year End Reminder	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

SAVE

### Email Address

email@email.com

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### Phone Registration Status

11234567891 Pending

You will receive a text to the number shown above asking you to complete the registration process. Once registered, your phone's status will show as Registered instead of Pending. If your number remains in Pending status or if you never receive the registration text, please contact support for assistance in resolving the issue. Once registered, text BAL to 97487 to receive your current year account balances. You can opt-out at anytime by texting STOP. For help with text commands, please text HELP to 97487.

The envelope icon in the navigation bar indicates when you have unread messages awaiting review. These messages include copies of manual claim letters, receipt notification letters, and reimbursement letters. Similar to alerts, you can simply click any message item to see the letter text in full.



Messages

Unread  Read SEARCH FOR MESSAGES

<input type="checkbox"/> May 1, 2018 Pending Letter	<input type="checkbox"/>
<input type="checkbox"/> Apr 17, 2018 Pending Letter	<input type="checkbox"/>
<input type="checkbox"/> Apr 17, 2018 Denial Letter	<input type="checkbox"/>

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