

# CONSUMER PORTAL QUICKSTART GUIDE

## Welcome...

to your PBA Benefit Accounts Consumer Portal. This one-stop portal gives you 24/7 access to view information and manage your Flexible Spending Account (FSA), Health Reimbursement Account (HRA), or Commuter (Parking/Transit) Accounts. 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
- Request a Dependent Card (18 or older)
- Update your personal profile information
- Download plan information, forms and notifications

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.

The Home Page is easy to navigate:

- Easily access the **Available Balance** and **“I Want To”** sections from the left-hand navigation area.
- The **I Want To...** section contains the most frequently used features for the Consumer Portal.
- In the left-hand column **Available Balance** links to the Account Summary page, where you can see and manage your accounts.
- 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.

You can also hover over the tabs at the top of the page.

Last Login: 6/1/2015 - Online April Clarke (0) Logout

Home Accounts Profile Statements & Notifications Tools & Support Dashboard

### I Want To...

- File A Claim
- Make HSA Transaction
- Manage Investments
- Manage My Expenses

### Available Balance

My HSA

Cash Account	\$200.00
Investment Account	\$3,065.00

My LPFSA: \$684.89

My Wellness: \$100.00

My DCFSA: \$217.24

### Welcome!

We're Making it Easy to Manage Your Healthcare Expenses

### Message Center

- 1 repayment(s) totaling \$72.85 due for paid claims that were later denied
- 3 receipt(s) needed to approve your claims

[Download Mobile App](#) [View More](#)

[Link Healthcare Claim Data](#)

### Quick View

#### HSA Contributions by Tax Year

Year	Contributions	Maximum Contribution
2015	\$3,110.00	\$3,350.00
2014	\$200.00	\$3,300.00
2013	\$200.00	\$3,050.00

Maximum Contribution: \$3,050.00 (93.8%)

#### Paid Claims By Category

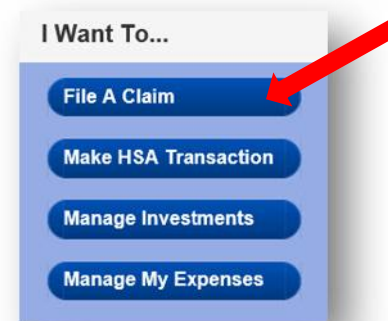
Category	Amount
Dental	\$283.25
Vision	\$60.69

\*Represents your contributions year to date compared to the maximum amount you can contribute based on IRS guidelines.  
\*Contribution amounts do not include pending contributions or rollovers.  
\*Represents all paid claims for the active plan year, including debit card, insurance premiums and claims paid directly to the health provider.

## HOW DO I FILE A CLAIM AND UPLOAD A RECEIPT?

1. On the **Home Page**, you may simply select the “**File a Claim**” under the “I want to...” section which can be located on the lefthand side of the home page.  
OR from any page on the portal, expand the “I want to...” section on the right hand side of the screen.
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. You may print the **Claim Confirmation Form** as a record of your submission. If you did not upload a receipt, you can upload the receipt from this screen or print a **Claim Confirmation Form** to submit to the administrator with the required receipts.

NOTE: If you see a **Receipts Needed** link in the Message Center 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**.



The screenshot shows a web portal interface. At the top, it says "Last Login: 5/19/2015 - Online" and "April Clarke (0) Logout". The navigation bar includes "Home", "Accounts", "Profile", "Statements & Notifications", "Tools & Support", and "Dashboard". The "I Want to..." dropdown is open. The main content area is titled "Accounts / Claims" and contains a table of claims. A red arrow points to the "Upload Receipt(s)" link in the "Claim Details" section of the first claim.

Date of Service	Account	Merchant/Provider	Claim Status	Amount
05/20/2015	My LPFSA	Metropolitan DentalCare	Pending Receipt	\$100.00

**Claim Details**

Claim Number: KDC000150520P0000201      Date(s) of Service: 05/20/2015  
Recipient: Cindy Clarke      Pending: \$100.00  
Payee: April Clarke  
Source: Online  
Receipt Status: Required

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

Date of Service	Account	Merchant/Provider	Claim Status	Amount
01/22/2015	My LPFSA	Target Eyes	Pending Receipt	\$73.87
01/15/2015	My Wellness	Dr. Sickets	Denied	\$98.65

## HOW DO I VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY?

1. For current Account Balance only, on the **Home Page**, see the **Available Balance** section.
2. For all Account Activity, click on the **Available Balance** link from the Home Page to bring you to the Account Summary page. Then you may select the underlined dollar amounts for more detail. For example, click on the amount under “Eligible Amount” to view enrollment detail.

NOTE: You can see election details by clicking to expand the line item for each account.



The screenshot displays the 'Accounts / Account Summary' page. It features a navigation menu on the left with options like 'Home', 'Accounts', 'Profile', 'Statements & Notifications', 'Tools & Support', and 'Dashboard'. The main content area is titled 'Accounts / Account Summary' and includes a 'Health Savings Account' summary table and a detailed table for '01/01/2015 - 12/31/2015'.

Account	Eligible Amount	Submitted Claims	Paid	Pending	Denied	Available Balance
My LPFSA	\$1,500.00	\$815.11	\$343.94	\$471.17	\$0.00	\$684.89
My DCFSA	\$750.00	\$100.00	\$0.00	\$100.00	\$0.00	\$188.40
My Wellness	-	\$98.65	\$0.00	\$0.00	\$98.65	\$100.00

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

1. From the **Home Page**, under the **Profile**, click the **Banking/Cards** link on the lefthand side of the screen.
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 the **Profile**, 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 answer an additional security question.
3. Complete your changes in the form.
4. Click **Submit**.

## 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. Before you begin, make sure that your employer is offering direct deposit setup online.

1. From the **Home Page**, under the **Tools&Support** tab, click **Change Payment Method** under the “**How Do I**” section.
2. Select **Reimburse Myself Using Direct Deposit** and click **Change Payment Method**. The **Add Bank Account: Direct Deposit Setup** page displays.
3. Enter your bank account information, and click **Submit**.
4. The **Payment Method Changed** confirmation displays.

## HOW DO I VIEW OR ACCESS...

### ...DOCUMENTS & FORMS?

1. From the **Home Page**, click the **Tools & Support** tab.
2. Click any form or document of your choice.

### ...NOTIFICATIONS?

1. From the **Home Page**, click the **Statements & Notifications** tab.
2. Click any link of your choice. **Receipt Reminders, Account Statements, Advice of Deposits, Denial Letters, or Denial Letters with Repayments** are a few options.

### ...PLAN INFORMATION?

1. On the **Home Page**, under the **Accounts** tab, you will be directed to the **Account Summary** page
2. Click onto the applicable account name and the **Plan Rules** will open in a pop-up window.  
**OR** from the **Home Page**, under the **Tools & Support** tab, you may view **Plan Summaries** for basic information. Then click each applicable plan to see the plan details.