PrimePay®

Participant Portal Quickstart Guide

Welcome to your PrimePay Benefit Accounts Participant Portal.

This one-stop portal gives you 24/7 access to view information and manage your Flexible Spending Account (FSA), Health Reimbursement Account (HRA), Commuter Benefits, and Wellness/Incentive Accounts.

Our one-stop portal 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.

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**, or
2. Hover over or click on the four tabs at the top.

How Do I Log On To The Home Page?

1. Go to **login.primepay.com** and click the
PRIMEPAY BENEFIT PORRTAL PARTICIPANT ACESS* widget.

2. If you have already registered for your account, enter your username and password.

3. Click **Login**.

Login Instructions for New Users

1. If you are creating your account for the first time, select **Get Started**
under the 'New User' icon and follow the instructions.
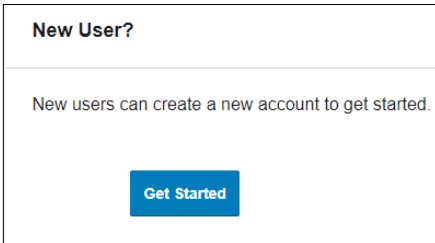
The Home Page is easy to navigate:

- Easily access the Available Balance and "**I Want To:**" sections to
work with your account right away.
    - o The **"I Want To:"** section contains the most frequently
    used features for the Participant Portal.
    - o The **Accounts** section links to your Accounts, Investments,
    and Profile.
- The **Tasks** section displays alerts and relevant links that enable
you to keep current on your accounts.
- The **Healthcare Savings Goal** section graphically displays your
HSA savings goals progress.
- The **Recent Transaction** section displays the last three
transactions on your account(s).
- 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 to navigate.
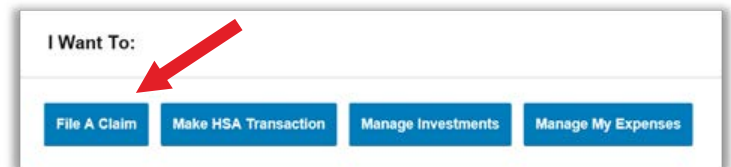
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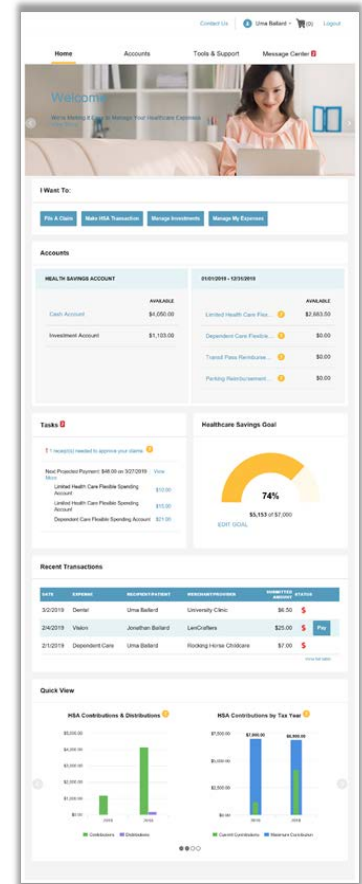
How Do I Get Assistance With My Claim?

1. From any page you can open the **Let's Chat** window from the bottom right icon.

2. Asking about claim denial or claims needing receipt will prompt the chat window to help you review your claims and find where you can attach receipts.
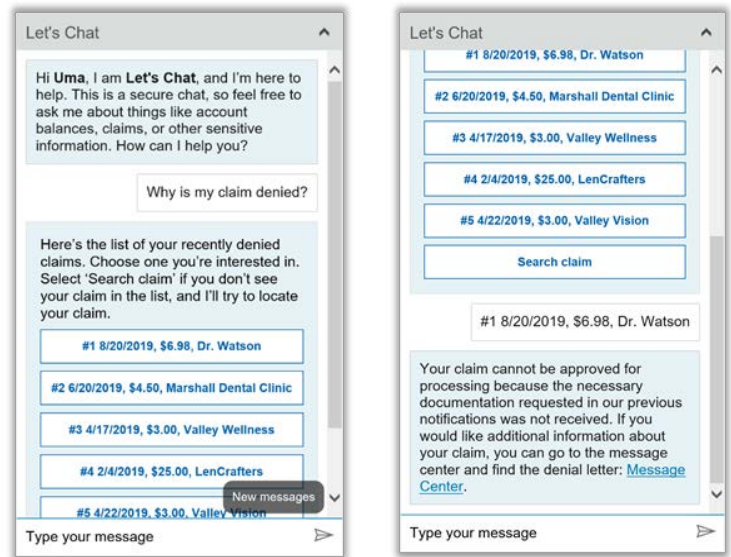
How Do I File A Claim And Upload A Receipt?

1. On the **Home Page**, you may simply select the **"File a Claim"** under the **"I Want To:"** section from any page on the portal, expand the **Accounts** tab on the top 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 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 or use one of your **Mobile Quick Receipts**.

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 Activity, click on the **Accounts** tab 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.

All Health Care Expense Activity in One Place

To view and manage ALL healthcare expense activity from EVERY source, use the **Dashboard**.

1. Under the **Accounts** menu is the **Dashboard**. The **Dashboard** provides you with an easy-to-use consolidated view of healthcare expenses for ongoing management of medical claims, premiums, and card transactions.

2. Easily filter expenses by clicking on the **Filter By Options** on the navigation pane on the left side of the screen or, by clicking on the **field headers** within the **Dashboard**.

3. Expenses can be exported into an Excel spreadsheet by clicking on the **Export Expenses** button on the upper left-hand side of the page.
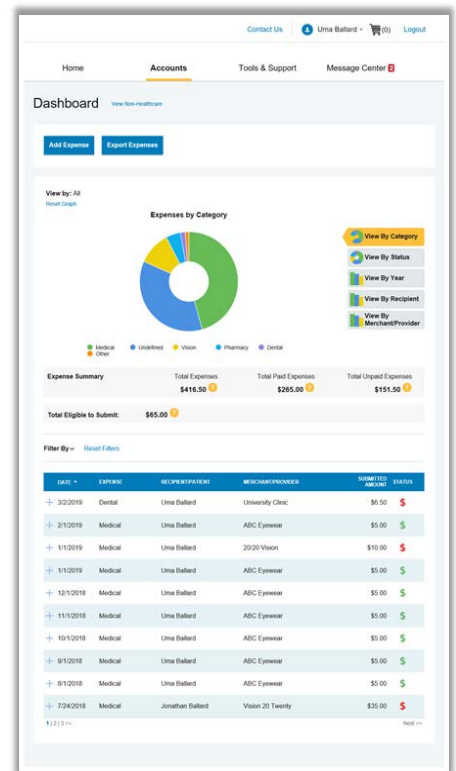
How Do I Add An Expense To The **Dashboard**?

1. From the **Dashboard** click on the **Add Expense** button on the upper left-hand side of the page.

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.
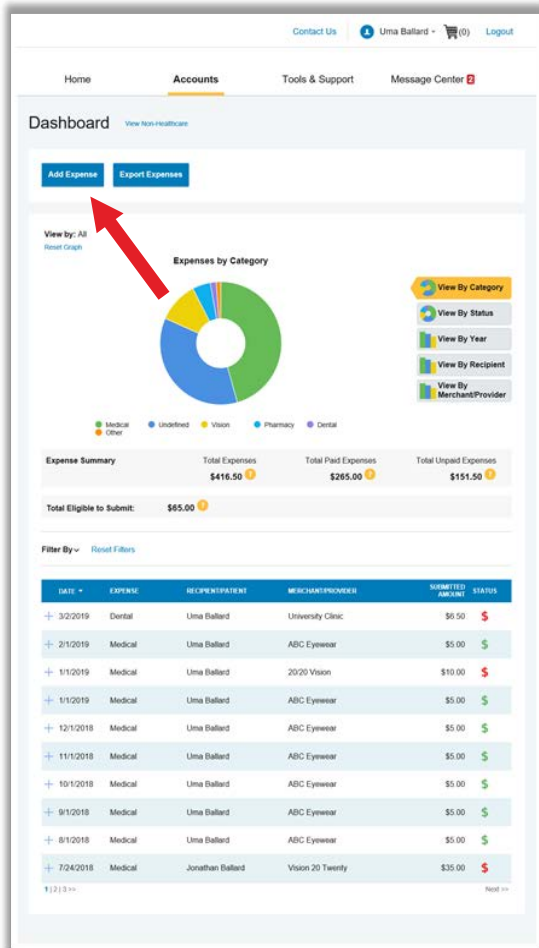
How Do I Pay An Expense?

1. You may process payments/reimbursements for unpaid expenses directly from the **Dashboard** page.

2. Expenses will be categorized, and payment can be initiated for unpaid expenses by clicking on the button to the right of the expense details.

3. You can filter the **Dashboard** to only view unpaid expenses by clicking on the unpaid status from the **Filter By** menu.

4. Simply choose which expenses you would like paid and you will be presented with the eligible accounts from which you can initiate payment.

5. When you click **Pay**, the claim details from the **Dashboard** will be pre-populated within the claim form. Review and edit the claim details by completing any required fields that remain blank.

6. You will have the option to either request a reimbursement to yourself or pay the provider.

Please note: If you choose check as a payment type, a $1.50 check fee applies.

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How Do I Edit An Existing Expense In The Dashboard?

1. You can edit expense details for all claim statuses directly from the **Dashboard** page.

2. Expand the claim details visible by clicking on the expense line item from the **Dashboard**.

3. You will be presented with options to add expense notes, update the expense details, mark the expense as paid/unpaid, or remove the expense for unpaid expenses from the **Dashboard**.

How Do I View My Payment (Reimbursement) History?

1. On the **Home Page**, under the **Accounts** tab, click **Payments** from the left-hand menu.

2. You will see reimbursement payments made to date, including debit card transactions.

3. 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 **Accounts** tab, under the **Profile** menu, click the **Banking/Cards** link.

2. Under the Debit Cards column, click **Report Lost/Stolen** or **Order Replacement** and follow instructions.

Please note: A $5 charge applies to replacement card orders.

How Do I Update My Personal Profile?

1. In the **Accounts** menu, you will find links to update profile information including profile summary details, dependents, and beneficiaries.

2. Click the appropriate link on the **Profile** 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**.
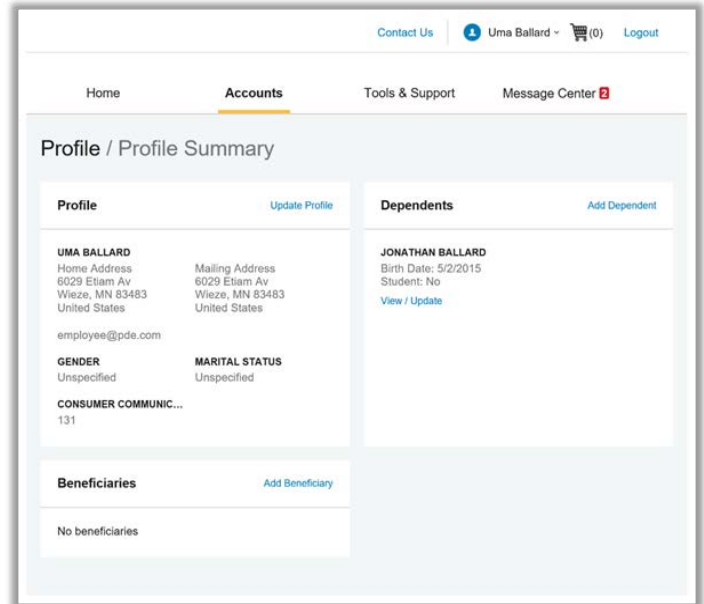
How Do I Get My Reimbursement Faster?

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.
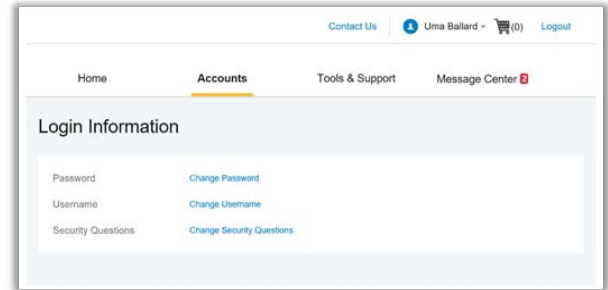
1. From the **Home Page**, under the **Tools & Support** tab, click **Change Payment Method** under the **"How Do I?"** section.

2. Select the **Update** for the appropriate plans. **The Payment Method/Update Payment Method** page displays.

3. Select **Reimburse Myself Using Direct Deposit** and **Update Bank Account**.

4. Enter your bank account information and click **Submit**.

5. The **Payment Method Changed** confirmation displays.

6. If there is a bank validation requirement, you will be notified on the portal to look for a small transaction or "micro-deposit" in your designated bank account in the next couple of days to enter online, which will validate your account.
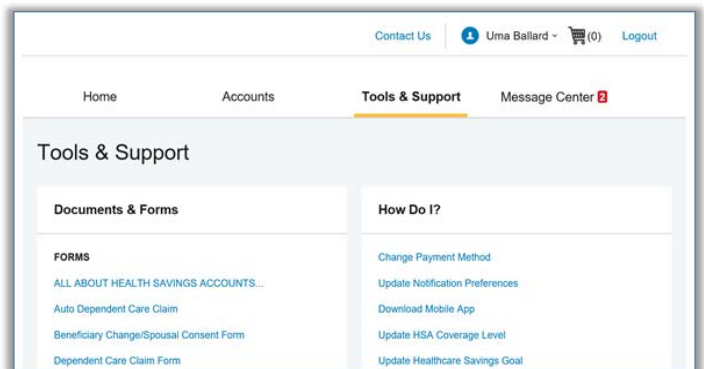
How Do I Change My Login And/Or Password?

1. In the **Accounts** menu, under the Profile section, and click **Login Information** on the left-hand navigation bar.

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 The Following Items:

1. **DOCUMENTS & FORMS**

    1. From the **Home Page**, click the **Tools & Support** tab.

    2. Click any form or document of your choice.

2. **NOTIFICATIONS**

    1. From the **Home Page**, click the **Message Center** tab.

    2. Click any link of your choice. You will be able to view and archive current documents, as well as reference documents archived previously.

    3. In addition, you can **Update Notification Preferences** by clicking on the link next to Notifications.
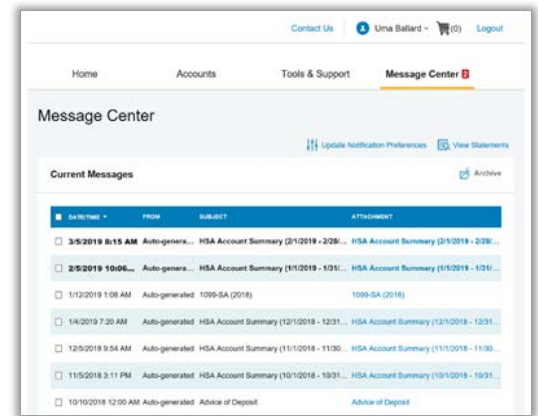
3. **PLAN INFORMATION**

    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** page, you may view **Plan Summaries** for basic information. Then click each applicable plan to see the plan details.
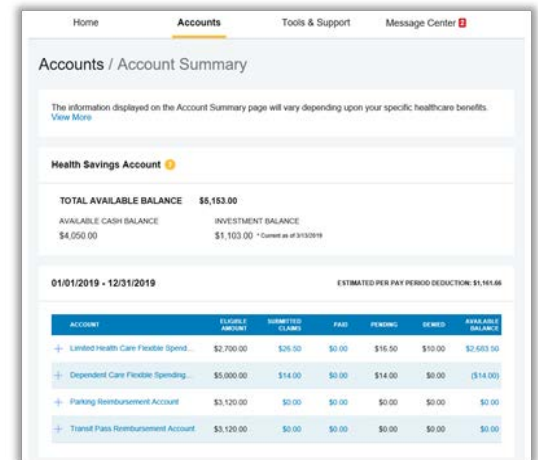
More Helpful Information if Enabled By Partner

From the **Home Page**, under the **Tools & Support** tab, you may find links that connect you to helpful information supplied by PrimePay. These may be links to PrimePay's website or to other valuable resources that enable you to manage your healthcare more effectively.