

# WEX HEALTH CLOUD CONSUMER PORTAL QUICKSTART GUIDE



Welcome to your 90 Degree Benefits, Connecticut Benefit Accounts Consumer Portal. This one-stop portal gives you 24/7 access to view information and manage your Flexible Spending Account (FSA), Dependent Care Spending Account (DCA), Health Reimbursement Account (HRA), and Commuter Benefits. 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
- 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 HOME PAGE?

1. Go to <https://90degreesbp.lh1ondemand.com/>
2. Enter your login ID and password.
3. Click **Login**.

**\*If you have never logged in before, you will need to register under the “New Users” section of the login.**

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

- Easily access the **Available Balance** and **“I Want To”** sections to work with your accounts right away.
- The **I Want To...**section contains the most frequently used features for the Consumer Portal.
- 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 **Recent Transaction** section displays the last 3 transactions on your account(s).
- The **Quick View** section graphically displays some of your key account information.

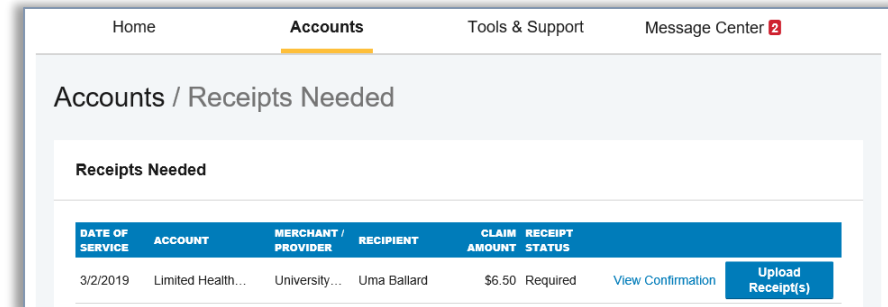
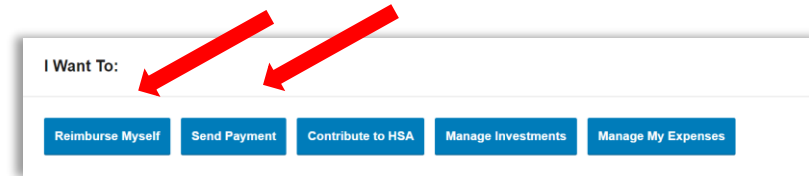
You can also hover over the tabs at the top of the page.

The screenshot displays the WEX Health Consumer Portal Home Page. At the top, there is a navigation bar with links for 'Contact Us', 'Cherokee Blankship', and 'Logout'. Below the navigation bar, there are tabs for 'Home', 'Accounts', 'Tools & Support', and 'Message Center'. A prominent blue banner reads 'Take Action: Manage Your Healthcare Expense'. Underneath, there are five buttons: 'Reimburse Myself', 'Send Payment', 'Contribute to HSA', 'Manage Investments', and 'Manage My Expenses'. The 'Accounts' section is divided into two periods: '1/1/2022 - 12/31/2022' and '1/1/2021-12/31/2021'. The first period shows a 'Cash Account' with an available balance of \$2,000.00 and an 'Investment Account' with \$12,200.00. The second period shows a 'Health Reimbursement A...' account with an available balance of \$2,743.22. The 'Tasks' section includes a notification: 'Need projected payment, \$6.75 on 3/15/2022'. The 'My HSA Planner' section features a piggy bank icon and a 'Launch My HSA Planner' button. The 'Recent Transactions' section shows a table with columns for 'DATE', 'EXPENSE', 'RECIPIENT/TAXID', 'MERCHANT/PROVIDER', 'BLIGHTED AMOUNT', and 'STATUS'. A single transaction is listed for 6/28/2021, categorized as 'Medical' from 'Cherokee Blankship... Delta Dental' for \$10.70. The 'Quick View' section contains two bar charts. The first chart, 'HSA Contributions & Distributions', shows data for 2020, 2021, and 2022. The second chart, 'HSA Contributions by Tax Year', shows data for 2020, 2021, and 2022, with 2021 showing the highest contribution at \$8,200.00. At the bottom, there is a privacy notice and a copyright notice: '© WEX Health Inc. 2004-2022. All rights reserved. Powered by WEX Health'.

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

1. On the **Home Page**, you may simply select “**Reimburse Myself**” or “**Send Payment**” under the “I want to...” section, **OR** 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.

HEALTH SAVINGS ACCOUNT		01/01/2018 - 12/31/2018	
	AVAILABLE		AVAILABLE
<a href="#">Cash Account</a>	\$2,012.50	<a href="#">Limited Health Care Flex...</a>	\$2,445.95
<a href="#">Advance</a>	\$0.00	<a href="#">Dependent Care Flexible...</a>	\$1,918.30
<a href="#">Investment Account</a>	\$795.00	<a href="#">Parking Reimbursement...</a>	\$1,280.00
<b>Available to spend</b> <small>Includes Advance</small>	<b>\$2,807.50</b>		

[Contact Us](#) | [Uma Ballard](#) | [\(0\)](#) | [Logout](#)

[Home](#) | **[Accounts](#)** | [Tools & Support](#) | [Message Center](#)

### Accounts / Account Summary

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

#### Health Savings Account

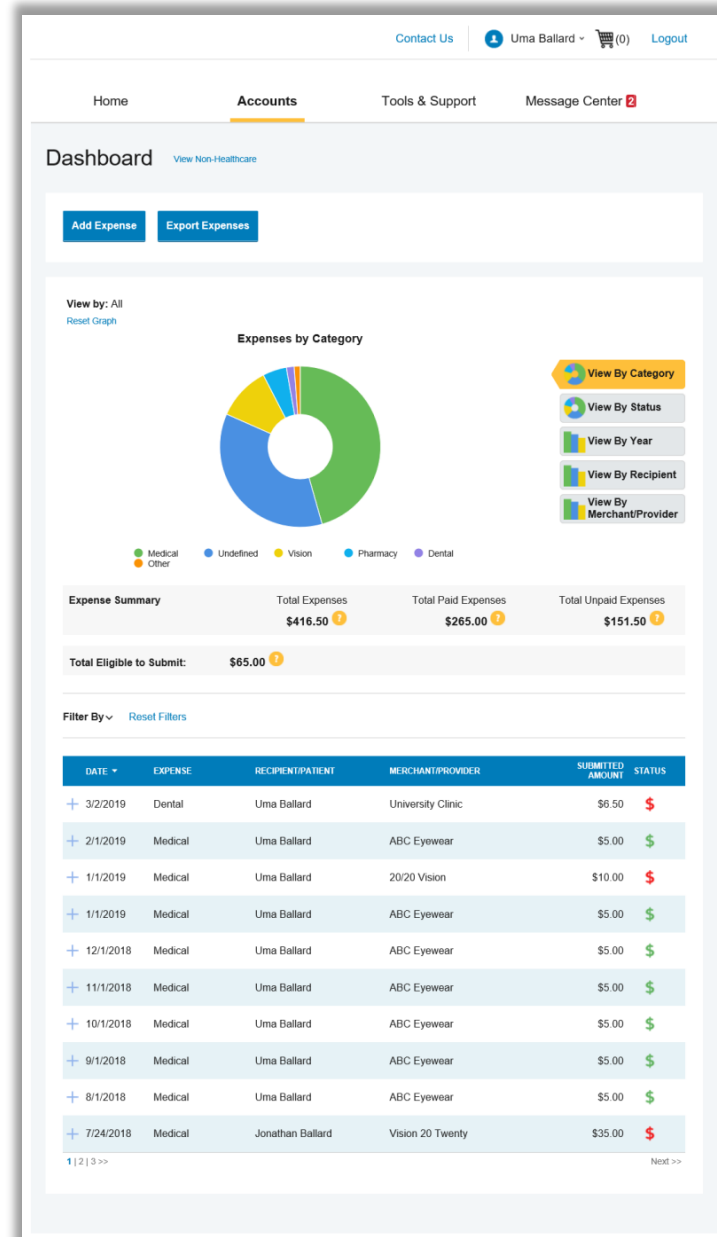
<b>TOTAL AVAILABLE BALANCE</b>	<b>\$5,153.00</b>
AVAILABLE CASH BALANCE	INVESTMENT BALANCE
\$4,050.00	\$1,103.00 * Current as of 3/13/2019

01/01/2019 - 12/31/2019 ESTIMATED PER PAY PERIOD DEDUCTION: \$1,161.66

ACCOUNT	ELIGIBLE AMOUNT	SUBMITTED CLAIMS	PAID	PENDING	DENIED	AVAILABLE BALANCE
+ Limited Health Care Flexible Spend...	\$2,700.00	\$26.50	\$0.00	\$16.50	\$10.00	\$2,683.50
+ Dependent Care Flexible Spending...	\$5,000.00	\$14.00	\$0.00	\$14.00	\$0.00	(\$14.00)
+ Parking Reimbursement Account	\$3,120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
+ Transit Pass Reimbursement Account	\$3,120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

**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 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 top of the page.



## HOW DO I ADD AN EXPENSE TO THE DASHBOARD?

1. From the **Dashboard** click on the **Add Expense** button on the top 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 REIMBURSE AN EXPENSE?

1. You may process reimbursements for unpaid expenses directly from the **Dashboard** page.
2. Expenses will be categorized and reimbursement can be initiated for unpaid expenses by clicking on the button to the right of the expense details.
3. Simply choose which expenses you would like paid and you will be presented with the eligible accounts from which you can initiate reimbursement.
4. When you click **Pay**, the claim details from the **Dashboard** will be pre-populated within the claim form. Review & edit the claim details as needed.
5. You will have the option to either request a reimbursement to yourself or pay the provider.

The screenshot displays the WEX Dashboard interface. At the top, there are navigation links for 'Home', 'Accounts', 'Tools & Support', and 'Message Center'. The 'Accounts' tab is active. Below the navigation, there are two buttons: 'Add Expense' and 'Export Expenses'. A red arrow points to the 'Add Expense' button. The main content area features a 'View by: All' dropdown and a 'Reset Graph' link. A donut chart titled 'Expenses by Category' shows the distribution of expenses across categories: Medical Other (green), Undefined (blue), Vision (yellow), Pharmacy (orange), and Dental (purple). To the right of the chart are five view options: 'View By Category', 'View By Status', 'View By Year', 'View By Recipient', and 'View By Merchant/Provider'. Below the chart is an 'Expense Summary' table with the following data:

Expense Summary	Total Expenses	Total Paid Expenses	Total Unpaid Expenses
	\$416.50	\$265.00	\$151.50

Below the summary is a 'Total Eligible to Submit' of \$65.00. A 'Filter By' dropdown and 'Reset Filters' link are also present. At the bottom, there is a table listing individual expenses with columns for Date, Expense, Recipient/Patient, Merchant/Provider, Submitted Amount, and Status.

DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS
3/2/2019	Dental	Uma Ballard	University Clinic	\$6.50	\$
2/1/2019	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
1/1/2019	Medical	Uma Ballard	20/20 Vision	\$10.00	\$
1/1/2019	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
12/1/2018	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
11/1/2018	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
10/1/2018	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
9/1/2018	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
8/1/2018	Medical	Uma Ballard	ABC Eyewear	\$5.00	\$
7/24/2018	Medical	Jonathan Ballard	Vision 20 Twenty	\$35.00	\$

At the bottom left of the table, there is a pagination indicator '1 | 2 | 3 >>' and at the bottom right, a 'Next >>' link.

## HOW DO I EDIT AN EXISTING EXPENSE IN THE DASHBOARD?

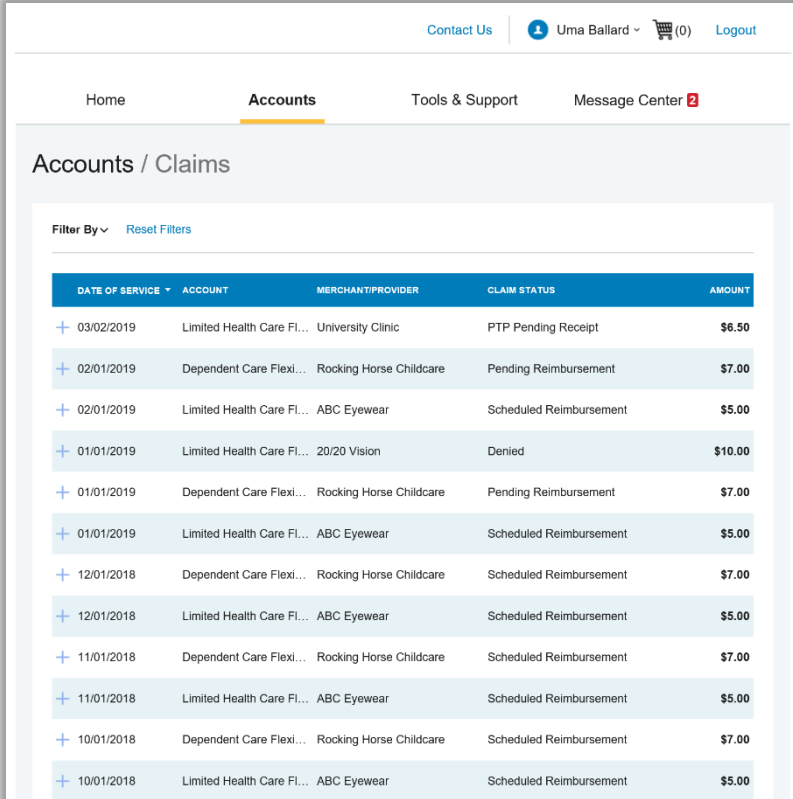
1. You can edit expense details for all claim statuses directly from the **Dashboard** page.
2. Expand the claim details visible by clicking on the expense line item from the Dashboard.
3. You will be presented with options to add expense notes, update the expense details, mark the expense as paid/unpaid or, remove the expense from the **Dashboard**.

Total Eligible to Submit: <b>\$8.00</b>					
DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS
9/1/2018	Medical	Amity Anderson	ABC Ortho	\$3.00	\$
8/1/2018	Medical	Amity Anderson	ABC Ortho	\$3.00	\$
7/1/2018	Medical	Amity Anderson	ABC Ortho	\$3.00	\$
6/6/2018	Dental	Amity Anderson	Downtown Dental	\$3.00	\$ <a href="#">Pay</a>
Expense Details	Description: Cavity		Date(s) of Service: 6/6/2018		
	Source: Online		Total Billed Amount: \$3.00		
	Expense Amount: \$3.00		Received Date: 6/1/18		
	Payable Amount: \$3.00				
	<a href="#">Upload Receipt(s)</a>	<a href="#">Add Expense Note</a>	<a href="#">Mark as Paid</a>		
	<a href="#">Remove Expense</a>	<a href="#">Update Expense</a>			

## HOW DO I VIEW MY CDH CLAIMS HISTORY AND STATUS?

1. From the **Home Page**, click on the **Accounts Tab**, and then click on the **Claims** link to see your claims history. You can apply filters from the top of the screen. You can filter by plan year, account type, claim status or receipt status.
2. By clicking on the line of the claim, you can expand the data to display additional claim details.

**Did you Know?** For an alternative perspective, you may also view claims history and status for all claim types including dependent care on the **Dashboard** page. You can apply filters from the top of the screen. Filter options on the Dashboard screen include: expense type, status, date, recipient or merchant/provider. You may also search for a specific expense by entering a description into the search field.



The screenshot displays the 'Accounts / Claims' page in a web application. At the top right, there are links for 'Contact Us', a user profile for 'Uma Ballard', a shopping cart icon with '(0)', and a 'Logout' button. Below this is a navigation bar with 'Home', 'Accounts' (highlighted), 'Tools & Support', and 'Message Center 2'. The main content area is titled 'Accounts / Claims' and includes a 'Filter By' dropdown and a 'Reset Filters' link. A table lists various claims with the following columns: DATE OF SERVICE, ACCOUNT, MERCHANT/PROVIDER, CLAIM STATUS, and AMOUNT. Each row starts with a plus sign icon.

DATE OF SERVICE	ACCOUNT	MERCHANT/PROVIDER	CLAIM STATUS	AMOUNT
+ 03/02/2019	Limited Health Care Fl...	University Clinic	PTP Pending Receipt	\$6.50
+ 02/01/2019	Dependent Care Flexi...	Rocking Horse Childcare	Pending Reimbursement	\$7.00
+ 02/01/2019	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 01/01/2019	Limited Health Care Fl...	20/20 Vision	Denied	\$10.00
+ 01/01/2019	Dependent Care Flexi...	Rocking Horse Childcare	Pending Reimbursement	\$7.00
+ 01/01/2019	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 12/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	\$7.00
+ 12/01/2018	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 11/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	\$7.00
+ 11/01/2018	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00
+ 10/01/2018	Dependent Care Flexi...	Rocking Horse Childcare	Scheduled Reimbursement	\$7.00
+ 10/01/2018	Limited Health Care Fl...	ABC Eyewear	Scheduled Reimbursement	\$5.00



## HOW DO I VIEW MY PAYMENT (REIMBURSEMENT) HISTORY?

1. From the **Home Page**, under the **Accounts** tab, click **Payments**. You will see reimbursement payments made to date, including debit card transactions.
2. By clicking on the line of a payment, you can expand the data to display additional details about the transaction.

The screenshot shows the 'Accounts / Payments' page. At the top, there are navigation links: 'Home', 'Accounts' (highlighted), 'Tools & Support', and 'Message Center 2'. Below the navigation is a 'Filter By' dropdown and a 'Reset Filters' link. The main content is a table with the following data:

DATE	NUMBER	METHOD	STATUS	AMOUNT
+ 10/10/2018	0000000000	Direct Deposit	Paid	\$36.00
+ 07/02/2018	0000027526	Check	Paid to Provider	\$10.00
+ 07/02/2018	0000027525	Check	Paid to Provider	\$10.00
+ 06/28/2018	0000465885	Check	Paid to Provider	\$15.00
+ 06/28/2018	0000465884	Check	Paid to Provider	\$15.00
+ 06/28/2018	0000465883	Check	Paid	\$150.00

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

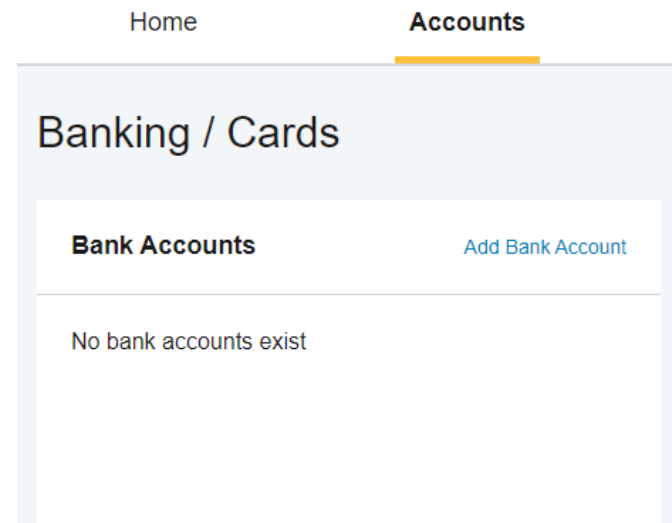
1. From the **Home Page**, under the **Accounts Tab**, click the **Banking** link.
2. Under the Debit Cards column, click **Report Lost/Stolen** or **Order Replacement** and follow instructions.

The screenshot shows the 'Banking' page. At the top, there are navigation links: 'Home', 'Accounts' (highlighted), 'Tools & Support', and 'Message Center 2'. Below the navigation is a 'Bank Accounts' section with an 'Add Bank Account' link. Under 'Bank Accounts', there are two sub-sections: 'CHECKING' and 'CHECKS'. The 'CHECKING' section shows details for USA Bank, card number xxxx3456, and a 'View' link. The 'CHECKS' section has an 'Order Checks' link. The 'Debit Cards' section shows details for Justine Davis, card number xPEND 1, status Active, expires 6/30/2018, and effective 6/11/2015. There are two links: 'Report Lost/Stolen' and 'Order Replacement', both highlighted with a red box.

## HOW DO I ENTER IN MY DIRECT DEPOSIT INFO (IF OFFERED BY MY EMPLOYER)?

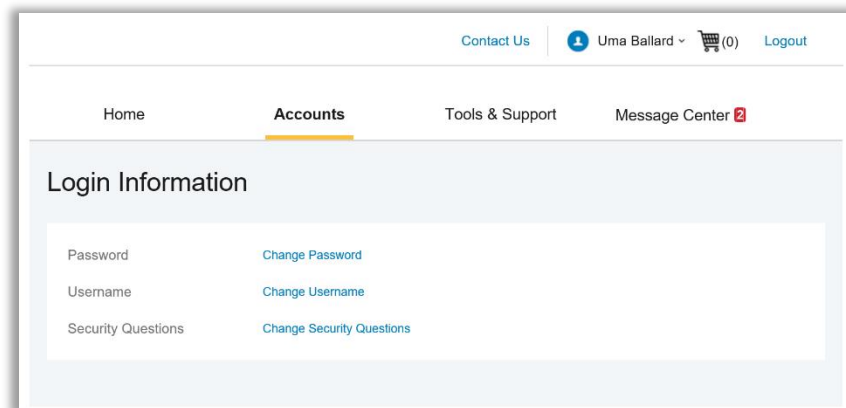
The fastest way to get your money is to sign up online for direct deposit to your personal checking account. Before you begin, make sure that your employer is offering direct deposit setup online.

1. From the **Home Page**, under the **Accounts** tab, click **Banking/Cards** under the “**Profile**” section.
2. Select **Add Bank Account**.
3. Enter your bank account information and click **Submit**.
4. **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. From the **Home Page**, click on the **Accounts Tab**, and click **Login Information**.
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:

### ...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 **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.

### ...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.

The screenshot shows the 'Message Center' page. At the top, there are navigation tabs: Home, Accounts, Tools & Support, and Message Center (which is highlighted). Below the tabs, there are links for 'Update Notification Preferences' and 'View Statements'. The main section is titled 'Current Messages' and contains a table of messages. Each message row includes a checkbox, a date and time, the sender (Auto-generated), the subject, and the attachment name.

DATE/TIME	FROM	SUBJECT	ATTACHMENT
<input type="checkbox"/> 3/5/2019 8:15 AM	Auto-genera...	HSA Account Summary (2/1/2019 - 2/28/...	HSA Account Summary (2/1/2019 - 2/28/...
<input type="checkbox"/> 2/5/2019 10:06...	Auto-genera...	HSA Account Summary (1/1/2019 - 1/31/...	HSA Account Summary (1/1/2019 - 1/31/...
<input type="checkbox"/> 1/12/2019 1:08 AM	Auto-generated	1099-SA (2018)	1099-SA (2018)
<input type="checkbox"/> 1/4/2019 7:20 AM	Auto-generated	HSA Account Summary (12/1/2018 - 12/31/...	HSA Account Summary (12/1/2018 - 12/31/...
<input type="checkbox"/> 12/5/2018 9:54 AM	Auto-generated	HSA Account Summary (11/1/2018 - 11/30/...	HSA Account Summary (11/1/2018 - 11/30/...
<input type="checkbox"/> 11/5/2018 3:11 PM	Auto-generated	HSA Account Summary (10/1/2018 - 10/31/...	HSA Account Summary (10/1/2018 - 10/31/...
<input type="checkbox"/> 10/10/2018 12:00 AM	Auto-generated	Advice of Deposit	Advice of Deposit

The screenshot shows the 'Accounts / Account Summary' page. It features a navigation bar with Home, Accounts (highlighted), Tools & Support, and Message Center. A note states that information varies by healthcare benefits, with a 'View More' link. Below this, the 'Health Savings Account' section displays the 'TOTAL AVAILABLE BALANCE' as \$5,163.00, broken down into 'AVAILABLE CASH BALANCE' of \$4,050.00 and 'INVESTMENT BALANCE' of \$1,103.00 (current as of 3/13/2019). An 'ESTIMATED PER PAY PERIOD DEDUCTION' of \$1,161.66 is also shown for the period 01/01/2019 - 12/31/2019. A table follows, detailing account activity with columns for Account, Eligible Amount, Submitted Claims, Paid, Pending, Denied, and Available Balance.

ACCOUNT	ELIGIBLE AMOUNT	SUBMITTED CLAIMS	PAID	PENDING	DENIED	AVAILABLE BALANCE
+ Limited Health Care Flexible Spend...	\$2,700.00	\$26.50	\$0.00	\$16.50	\$10.00	\$2,683.50
+ Dependent Care Flexible Spending...	\$5,000.00	\$14.00	\$0.00	\$14.00	\$0.00	(\$14.00)
+ Parking Reimbursement Account	\$3,120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
+ Transit Pass Reimbursement Account	\$3,120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00