



1Direct Member Manual BASIC Benefits Card

A Guide to Accessing your
HRA/FSA/Parking & Transit Benefits Online

<https://hrbenefitsdirect.com/Basic>



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hra@basiconline.com

About 1Direct Employee Portal Manual

1Direct Employee Portal saves time and effort by providing access to your benefits accounts. Through 1Direct Employee Portal, you can view your accounts as well as:

- Instantly add or change personal.
- Quickly create claims or find out what claims have been paid and when.
- Conveniently add or edit dependents whenever you need.
- Effortlessly track payments and account balances.
- View secure messages from your plan administrator concerning your benefits.

Once your Company Benefits Administrator provides you with a username and password navigate to <https://hrbenefitsdirect.com/Basic> to login.

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Getting Started

To start using 1Direct Employee Portal, you need a username and a password.

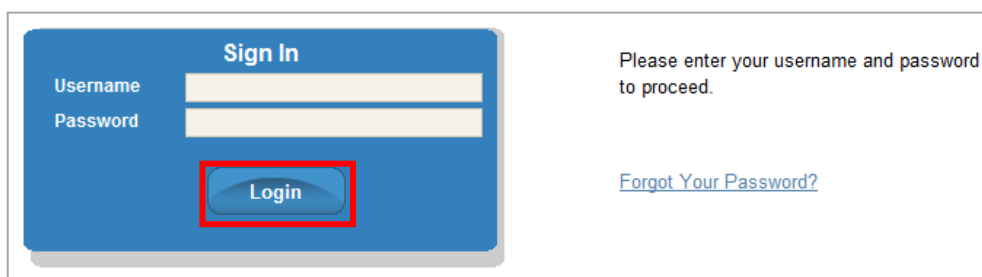
User Name: Your Username is the first initial of your first name, your full last name and the last 4 digits of your social security number. For example, John Smith with a social security number of 000-123-4567, would use Jsmith4567.

Password: The temporary password is Welcome123. If you were enrolled in the HRA after 1/1/15 the temporary password is WELCOME123.

BASIC strongly suggests that you do not use your SSN as your user name or password.

Log into the Site:

To log into your benefits portal navigate to the **Login** page (<https://hrbenefitsdirect.com/Basic>), type your **Username** and **Password** into the appropriate fields, and click LOGIN.



Sign In

Username

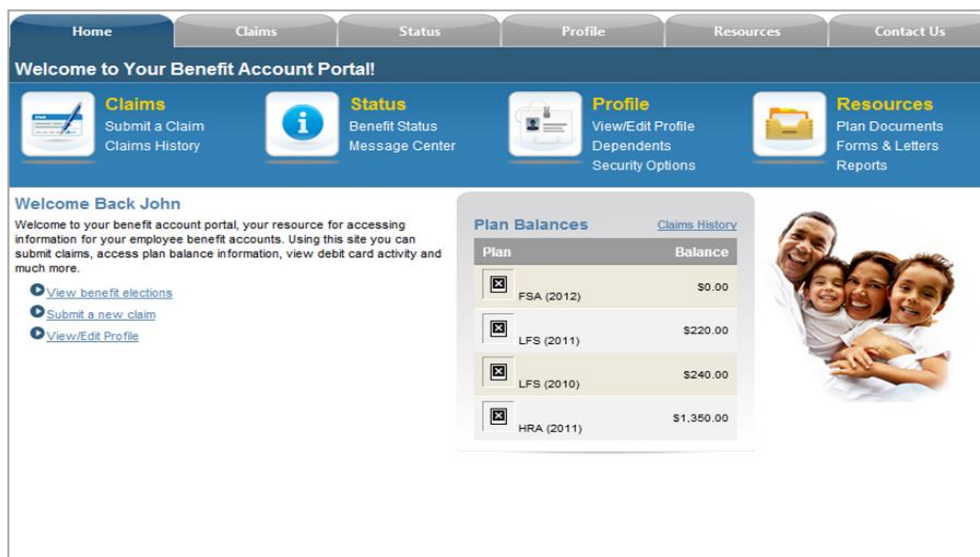
Password

Login

Please enter your username and password to proceed.

[Forgot Your Password?](#)

1. You will be prompted to answer 2 security questions during your first time log in. These are stored in case you forget your password.
2. You will be logged into your Benefit Accounts Portal and directed to the **Home** page.



Home Claims Status Profile Resources Contact Us

Welcome to Your Benefit Account Portal!

Claims
Submit a Claim
Claims History

Status
Benefit Status
Message Center

Profile
View/Edit Profile
Dependents
Security Options

Resources
Plan Documents
Forms & Letters
Reports


Welcome Back John

Welcome to your benefit account portal, your resource for accessing information for your employee benefit accounts. Using this site you can submit claims, access plan balance information, view debit card activity and much more.

- [View benefit elections](#)
- [Submit a new claim](#)
- [View/Edit Profile](#)

Plan Balances [Claims History](#)

Plan	Balance
<input checked="" type="checkbox"/> FSA (2012)	\$0.00
<input checked="" type="checkbox"/> LFS (2011)	\$220.00
<input checked="" type="checkbox"/> LFS (2010)	\$240.00
<input checked="" type="checkbox"/> HRA (2011)	\$1,350.00



Receive a Forgotten Username and/or Password

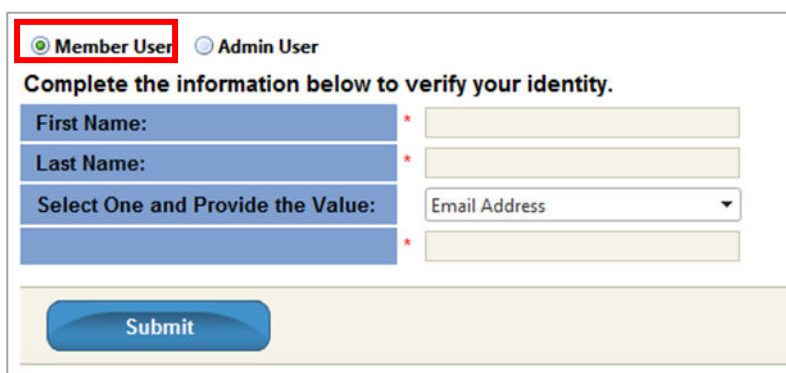
If you forget your username and/or password, you may follow our three-step user identification process to reset your password and restore access to your account.

1. Navigate to the **Login** page (<https://hrbenefitsdirect.com/Basic>), and click **Forgot Your Password?**.



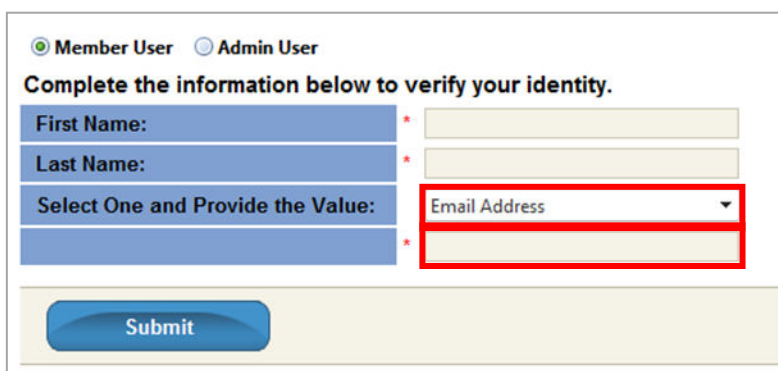
The screenshot shows a 'Sign In' form with fields for 'Username' and 'Password', and a 'Login' button. To the right, there is a message: 'Please enter your username and password to proceed.' Below this message, the link 'Forgot Your Password?' is highlighted with a red rectangle.

2. Make sure the **MEMBER USER** button is selected and enter your **First Name** and **Last Name** into the corresponding textboxes.



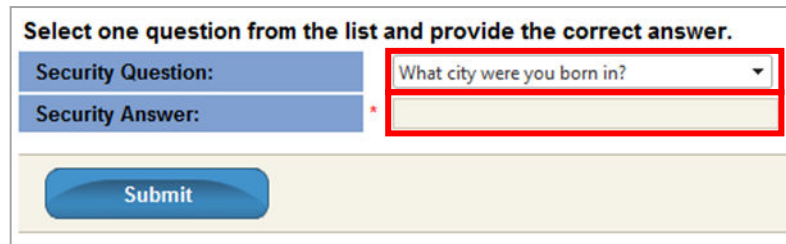
The screenshot shows a form for user verification. At the top, there are two radio buttons: 'Member User' (selected and highlighted with a red rectangle) and 'Admin User'. Below them is the instruction 'Complete the information below to verify your identity.' followed by four text input fields: 'First Name:', 'Last Name:', 'Select One and Provide the Value:' (with a dropdown menu showing 'Email Address'), and an empty field. A 'Submit' button is at the bottom.

3. Click the **SELECT ONE** arrow then select **Email Address**, **Member ID**, or **Username** from the drop-down list and provide the appropriate information into the textbox below.



This screenshot is similar to the previous one, but the 'Email Address' option in the dropdown menu under 'Select One and Provide the Value:' is highlighted with a red rectangle. The 'Member User' radio button remains selected.

4. Click SUBMIT.
5. Click the SECURITY QUESTION arrow then select the **Security Question** you wish to answer from the drop-down list and type the correct answer into the SECURITY ANSWER textbox.

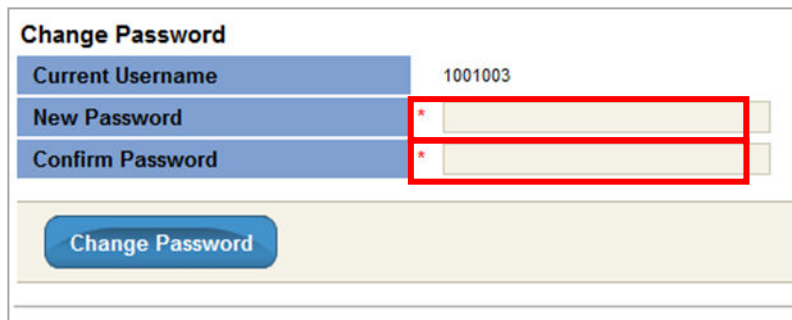


Select one question from the list and provide the correct answer.

Security Question:	What city were you born in?
Security Answer: *	

Submit

6. Click SUBMIT.
7. Enter a **New Password** in the corresponding textbox to change your password and reenter it to confirm it.



Change Password

Current Username	1001003
New Password *	
Confirm Password *	

Change Password

8. Click CHANGE PASSWORD.
9. You will be immediately logged into to your site and directed to your **Home** page.

Viewing Your Account Information

There are several ways to view your benefits accounts. Through 1Direct Employee Portal, you can view your list of accounts, the status of your accounts, and your account messages.

- To view your list of accounts—Navigate to the **Home** page. Your accounts are listed in the **Plan Balances** section. Your plan balance information is also displayed on the landing page for each section of the website.

The screenshot shows the 1Direct Employee Portal Home page. The top navigation bar includes links for Home, Claims, Status, Profile, Resources, and Contact Us. Below the navigation bar, there are four main sections: Claims, Status, Profile, and Resources. The Status section is highlighted with a red box. Within the Status section, the 'Benefit Status' link is highlighted with a red box. Below the Status section, there is a 'Plan Balances' table. The table has two columns: 'Plan' and 'Balance'. The table lists four plans: FSA (2012) with a balance of \$0.00, LFS (2011) with a balance of \$220.00, LFS (2010) with a balance of \$240.00, and HRA (2011) with a balance of \$1,350.00. The 'Plan Balances' section is highlighted with a red box.

Plan	Balance
FSA (2012)	\$0.00
LFS (2011)	\$220.00
LFS (2010)	\$240.00
HRA (2011)	\$1,350.00

- To view the status of your accounts—Navigate to the **Benefit Status** page by selecting the **Benefit Status** Link under the **Status** Section in the Top Navigation Bar.

The screenshot shows the 1Direct Employee Portal Status section. The top navigation bar includes links for Home, Claims, Status, Profile, Resources, and Contact Us. Below the navigation bar, there are four main sections: Claims, Status, Profile, and Resources. The Status section is highlighted with a red box. Within the Status section, the 'Benefit Status' link is highlighted with a red box.

- Or select the **Status** tab and click on the **Benefit Status** icon.

The screenshot shows the 1Direct Employee Portal Status section. The top navigation bar includes links for Home, Claims, Status, Profile, Resources, and Contact Us. Below the navigation bar, there are four main sections: Status Home, Benefit Status, and Message Center. The Benefit Status section is highlighted with a red box.

- The **Benefit Status** Page will display. Different information may be displayed for each plan type.

Status > Benefit Status

The list below displays plan details for all of your current employee benefit accounts.

Plan Description: Medical Spending Account

Plan ID	Plan Year	Election	Total Rollover	Total Benefit	Claims	Paid	HRA Ded	YTD HRA Ded	Denied	Deposits	Pending Settlements	Available Balance	Plan Start Date	Plan End Date	Last Date to Incur Claims	Last Date To submit claims
FSA	2012	\$1,440.00	\$0.00	\$1,440.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,380.00	N/A	\$1,440.00	1/20/2012	1/19/2013	3/5/2013	4/4/2013
LFS	2011	\$120.00	\$0.00	\$120.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$115.00	N/A	\$120.00	1/20/2011	1/19/2012	1/19/2012	5/18/2012

Plan Description: Health Reimbursement Arrangement

Plan ID	Plan Year	Election	Total Rollover	Total Benefit	Claims	Paid	HRA Ded	YTD HRA Ded	Denied	Deposits	Pending Settlements	Available Balance	Paid Balance	Plan Start Date	Plan End Date	Last Date to Incur Claims	Last Date To submit claims
HRA	2011	\$1,350.00	\$0.00	\$1,350.00	\$250.16	\$135.14	\$0.00	\$100.00	\$0.00	\$1,293.75	N/A	\$1,214.86	\$1,214.86	1/20/2011	1/19/2012	1/19/2012	2/18/2012

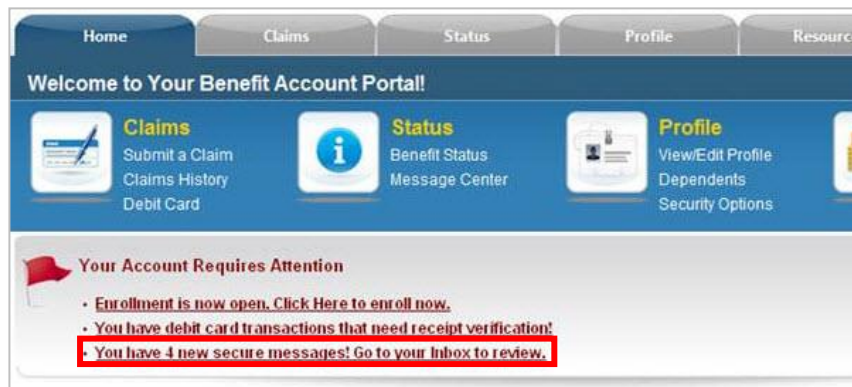
Contributions

Deposit Date	Deposit Amount
No records to display.	

Accessing Secure Messages from your Administrator

Through 1Direct Employee Portal, you can view messages from your administrator. If you have a new message in the message center, a notification will be displayed in the “**Your Account Requires Attention**” banner directly below the Homepage Navigation menu. Select the “You have x new secure messages!” link to open your Inbox to review your new messages.

The **Message Center** will open. To view a message, select the **View** link on the line



corresponding to the message you would like to view. If you would like to archive a message, select the **Archive** link. This will move the message from your Inbox into your Archive. You can use the **Inbox** and **Archive** tabs to toggle between your message inbox and message archive.

Home Claims **Status** Profile Resources Contact Us

Status Summary **Benefit Status** **Message Center**

Status > Message Center

Inbox Archive

Received	Subject		
11/22/2010 11:00 AM	Claim Status Notification	@	View Archive
11/19/2010 2:41 PM	Claim Status Notification	@	View Archive
11/19/2010 2:41 PM	Claim Status Notification		View Archive
11/19/2010 2:41 PM	Claim Status Notification		View Archive

You can also access the Secure Messaging Center at any time by selecting the **Message Center** Link under the **Status** Section in the Top Navigation Menu from the home page.

Claims
Submit a Claim
Claims History

Status
Benefit Status
Message Center

Profile
View/Edit Profile
Dependents
Security Options

Resources
Plan Documents
Forms & Letters
Reports

Or select the **Status** tab and click on the **Message Center** icon.

Home Claims **Status** Profile Resources Contact Us

Status Home **Benefit Status** **Message Center**

Handling Claims

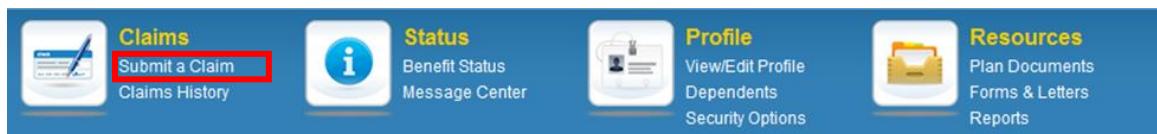
1Direct Employee Portal allows you to create and view claims online. You can file a new claim or view your claims history.

****Please do not submit debit card verifications under the “submit a claim” option. This option is for reimbursement requests only (expenses that you did not use your BASIC Benefits Card for). Verifications can be submitted under the debit card option.**

File a New Claim

1. There are two ways to access the **Claim Submittal** form:

You can select the **Submit a Claim** link under the **Claims** Icon in the Top Navigation Menu from the home page.



Or you can select the **Claims** tab and click on the **Submit a Claim** icon.



2. To submit a claim, complete the following fields:

The screenshot shows a web application interface for submitting a claim. At the top, there is a navigation bar with tabs: Home, Claims (selected), Status, Profile, Resources, and Contact Us. Below the navigation bar, there are three main sections: Claims Home, Submit a Claim (active), and Claims History. The 'Submit a Claim' section contains a form with the following fields:

- Plan:** * FSA (2013) (dropdown)
- Provider:** Johnson Eyecare (dropdown)
- Claimant Name:** * DON JOHNSON (dropdown)
- Description:** Contac Lens Examination (text input)
- Service Type:** Vision Services (dropdown)
- Service From Date:** * 8/1/2013 (calendar icon)
- Service To Date:** * 8/1/2013 (calendar icon)
- Requested Amount:** * 50.00 (text input)
- Receipt(s):** Upload Receipt (link), Files (table with 'Contact_Lens_Exam_Receipt.pdf (79.0KB)' and 'Remove' button)
- Notes:** Contact lens exam and sample contact lenses. (text area)

Allowed file types include: Microsoft Word (.doc), Adobe Acrobat (.pdf), JPEG (.jpg), Bitmap (.bmp), GIF (.gif).


At the bottom of the form, there are two buttons: Submit and Cancel.

- **Plan**—Select a plan from the drop-down list (claim may be reassigned to another Plan by the Administrator based on Plan rules)
- **Provider**—Enter the provider's name directly or select from the drop-down list. (optional)
- **Claimant Name**—Select either your name, your spouse's, or your dependent's name from the drop-down list according to who received the service.
- **Description (not required)**—Enter a short description of the care, prescription, or services received.
- **Service From Date**—Select the beginning date of service.
- **Service To Date**—Select the ending date of service. For a purchase, an appointment, or a visit on a single day, change both date fields to the same day.
- **Requested Amount**—Enter the amount of your claim (the amount of reimbursable expenses).
- **Receipt**—Select **Upload Receipt**, navigate to the scanned document or image, and click OPEN to upload a receipt or other documentation for your claims. Most plans require documentation for claims. Multiple receipts can be uploaded, but they must be contained in one document.
- **Notes**—Enter any relevant information about this claim.


3. Click SUBMIT to enter your claim.

The **Claim Confirmation Receipt** will display so that you can print it for your records. If you have another claim to enter, click ENTER A NEW CLAIM. Otherwise, use the navigation menu to access other pages on the site.

Claims > Submit a Claim > Claim Confirmation

 • Your claim and receipt(s) were successfully submitted. Print this form for your personal records.

Claimant Name: DON JOHNSON
 Plan: FSA
 Provider: Johnson Eyecare
 Dates of Service: 8/1/2013
 8/1/2013
 Requested: 50
 Notes: Contact lens exam and sample c



WW50000072WW

[Enter a New Claim](#)

View Your Claims History





1. There are two ways to access the **Claims History** form:

You can select the **Claims History** link from the **Plan Balances** section of the home page.

Welcome Back John

Welcome to your benefit account portal, your resource for accessing information for your employee benefit accounts. Using this site you can submit claims, access plan balance information, view debit card activity and much more.

- [View benefit elections](#)
- [Submit a new claim](#)
- [View/Edit Profile](#)

Plan Balances		Claims History
Plan	Balance	
 FSA (2012)	\$0.00	
 LFS (2011)	\$220.00	
 LFS (2010)	\$240.00	
 HRA (2011)	\$1,350.00	

Or you can select the **Claims History** Link under the **Claims** Icon in the Top Navigation Menu from the home page.



Or you can select the **Claims** tab and click on the **Claims History** icon.



2. Your claims history will display. If the claim for which you are looking is not displayed, select the **Member** (or dependent) and **Plan Year** for the claim you want to view and click **SUBMIT**.

Claims > Claims History

Select the family member and plan year for which you would like to view your claims. Click on the claim number to view claim detail.

Member:

Plan Year:

PSA Claim Number	Date of Service	Plan	Type	Provider	Claim	Reimbursed	Excluded	Date Paid
*** ALL ***								
0000007107	01/01/2011	HRA	HRA		(\$100.00)	\$0.00	(\$100.00)	3/15/2012
0000006998	05/15/2011	FSA 2011	FSA		\$12.33	\$0.00	\$0.00	
0000006986	01/21/2011	LFS	FSA		\$1,000.00	\$20.00	\$769.00	6/10/2011
0000006969	02/28/2011	FSA 2011	FSA		\$10.00	\$0.00	\$0.00	
0000006967	02/28/2011	LFS	FSA		\$4.00	\$0.00	\$0.00	
0000006966	02/28/2011	LFS	FSA		\$5.00	\$0.00	\$0.00	

- Click on the appropriate **Claim Number** link to display the **Claim Details** for that particular claim:

Home
Claims
Status
Profile
Resources
Contact Us

Claims Home
Submit a Claim
Claims History

Claims > Claims History > Claim Details

Claim Number:	00000006906	Claim Type:	
Alt Claim Number:		Date of Service:	1/21/2011
Status:	VALID	Claim Amount:	\$1,000.00
Claimant Name:	Allen, John	Excluded:	\$769.00
Plan:	LFS	Reason:	
Pay To:	Member	Description:	
Process Date:	3/1/2011	Notes:	You have reached your annual maximum benefit. Assigned to Grace Period Claim 6987--Zero dollars processed Debit Card Remaining for Terminated Debit Card Member, Readjudicated On 05/09/2011
Provider:			

View EOB

Check History

Date	Payee	ClaimantName	Check	Amount Paid	Total Check
06/10/2011	Allen, John	Allen, John	0000000004	\$20.00	\$20.00

< Previous
Next >

- Click the **View EOB** button to view the corresponding Explanation of Benefits (EOB).
(This is not an EOB from your insurance carrier.)

1 / 1
100%
Business Objects

Flex Explanation of Benefits
25-Oct-2013

Test Client
22 Waterville Road
Avon, CT 06085

Allen, John
987 Oak Ridge Drive
St. Louis, MO 63119

XXX-XX-1020

Plan Year: 2011
LFS

Start	End	Provider	Claim	Excluded	Reason	Reimbursement	Notes
21-Jan-2011	21-Jan-2011		\$1,000.00	\$769.00	YTDMAX	\$231.00	You have reached your annual maximum benefit. Assigned to Grace Period Claim 6987--Zero dollars processed Debit Card Remaining for Terminated Debit Card Member, Readjudicated On 05/09/2011
Totals:			\$1,009.00	\$769.00		\$240.00	

Plan	Elections	Contributions Year-to-Date	Claims Submitted	Amount Paid Year-to-Date	Current Account Balances	Available Balances
LFS	\$240.00	\$20.00	\$1,009.00	\$20.00	\$0.00	\$0.00

Reason

Working with Debit Card Transactions

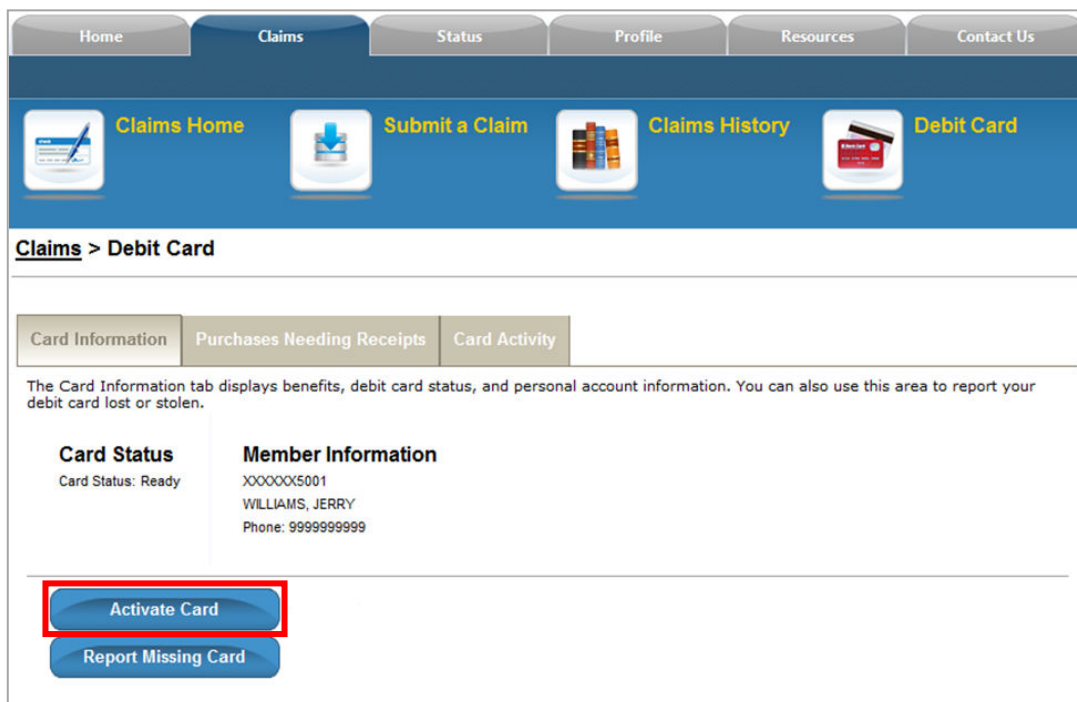
If you are enrolled in a debit card plan with the BASIC Benefits Card, you have access to your debit card transactions and real-time balance information on 1Direct Employee Portal. This information can be accessed by clicking on the **Debit Card** Link under the **Claims** Icon in the Top Navigation Menu from the home page or by selecting the **Claims** tab and clicking on the **Debit Card** icon.



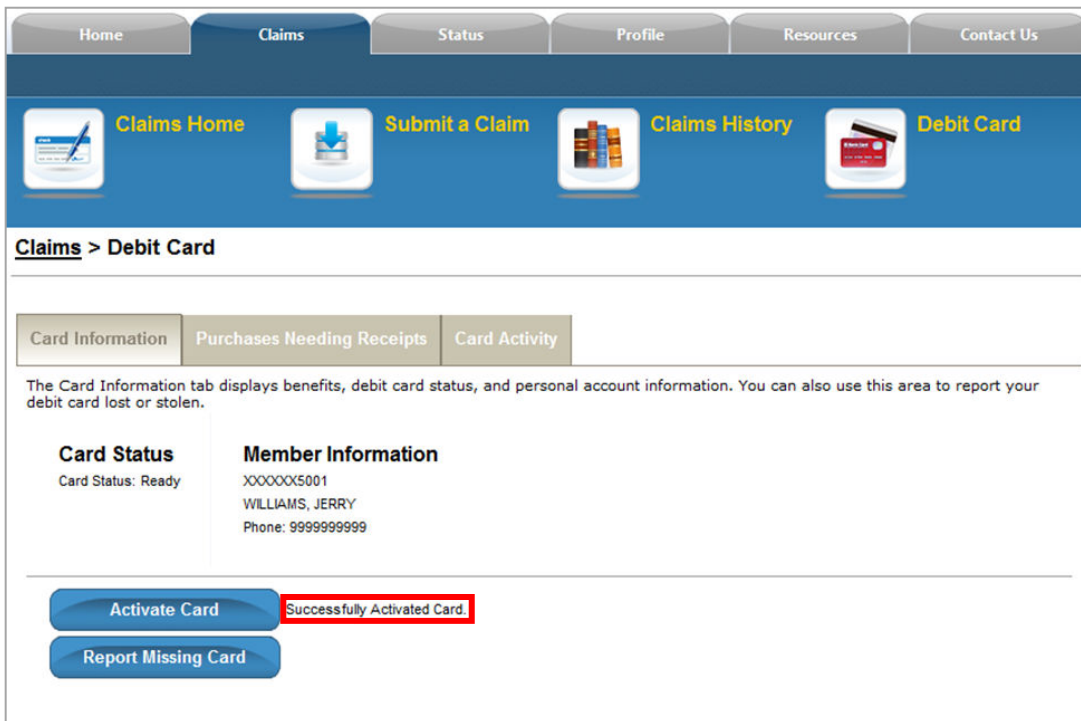
In addition to accessing up-to-the minute information on your debit card accounts, you can activate your card, report a card lost or stolen, and submit documentation (receipts) or print refund letters for unsubstantiated debit card transactions.

Activate a Card

You can activate your card by calling the number on the back of your BASIC Benefits Card or on 1Direct Employee Portal. On the **Card Information** tab of the **Debit Card** screen, click the **ACTIVATE CARD** button.

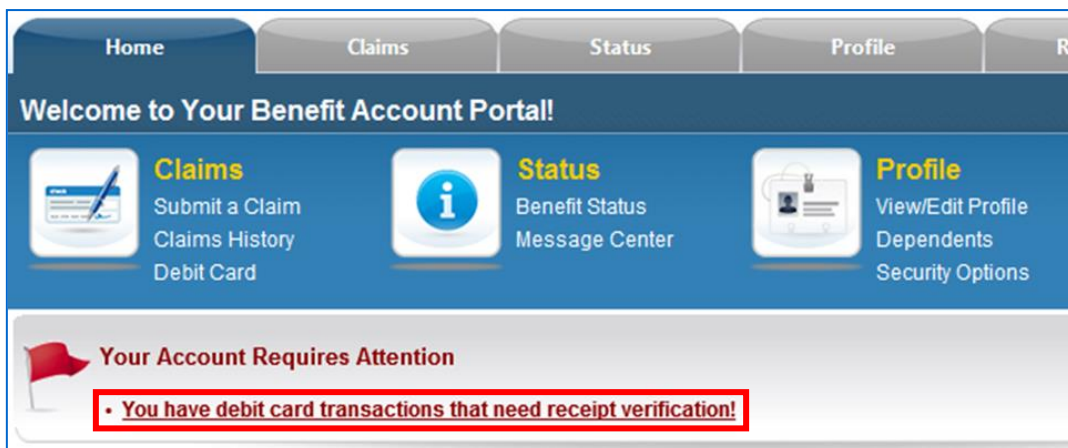


When you click the **ACTIVATE CARD** button, after a short delay, a confirmation message is displayed:



Pending Debit Card Transactions

When you have one or more debit card transactions that require receipts and/or additional documentation in order for the transaction to be approved or are in the statuses of RMI or Ineligible, a link will appear in the header section of your home page under the “Your Account Requires Attention” heading.



Click on the “You have debit card transactions that need receipt verification!” link.

You will be routed to the **Purchase Needing Receipts** tab on the **Debit Card** screen:

The screenshot shows the 'Debit Card' screen with a navigation bar at the top containing 'Claims Home', 'Submit a Claim', 'Claims History', and 'Debit Card'. Below the navigation bar is a breadcrumb trail 'Claims > Debit Card'. The main content area has three tabs: 'Card Information', 'Purchases Needing Receipts' (which is selected), and 'Card Activity'. Under the 'Purchases Needing Receipts' tab, there are three sections: 'Transactions Pending Automatic Substantiation', 'Transactions Needing Additional Information', and 'Transactions Pending Approval of Submitted Documentation'. The first two sections show 'No records to display'. The third section contains a table with transaction details.

	Submitted Date	Submitted Amount	Eligible Amount	Status
View Detail	08/27/2013	\$5.36	\$4.36	Awaiting Approval
View Detail	03/06/2013	\$1.26	\$1.26	Awaiting Approval
View Detail	08/27/2013	\$11.04	\$8.04	Awaiting Approval
View Detail	09/10/2012	\$1.29	\$1.29	Awaiting Approval
View Detail	09/26/2012	\$1.28	\$1.00	Awaiting Approval
View Detail	03/06/2013	\$1.50	\$1.00	Awaiting Approval
View Detail	03/06/2013	\$1.25	\$1.00	Awaiting Approval

The top portion of the screen is split into three different sections:

- If you have any debit card transactions that are pending automatic substantiation, they will appear under the **Transactions Pending Automatic Substantiation** header.
- If you have any transactions that are pending due to insufficient documentation (i.e. additional information is needed) they will appear under the **Transactions Needing Additional Information** header.
- Transactions pending the approval of any submitted documentation will appear under the **Transactions Pending Approval of Submitted Documentation** header.

From here, you can do one of two things:

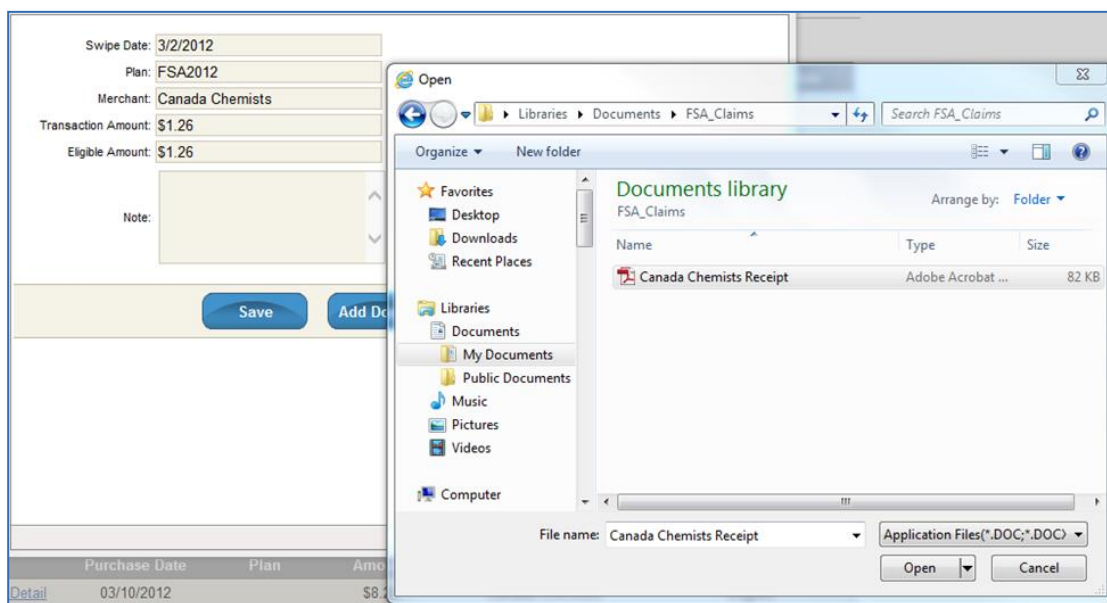
- View Details of Pending Transactions
- Submit Documentation

To submit documentation, on the **Purchases Needing Receipts** tab of the **Debit Card** screen, click the **View Detail** link corresponding to the item for which you need to submit documentation.

A pop-up will be presented with details of the transaction; click **ADD DOCUMENTATION**.

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A browsing window will open. Navigate to the location of the file you would like to upload and select your documentation file. You may only attach one document to each submission. Any image file is acceptable (*.bmp, *.jpg, *.png, *.tiff, *.gif) as well as Microsoft Word Files (*.doc and *.docx) and Adobe PDF (*.pdf) files.



Click the OPEN button from the browsing window once you have found the file that contains your receipt. You may only attach one document to each submission. When you click OPEN, you will be returned to the **Process Follow Up Requests** pop-up window and you will see the progress of your upload:

The image shows a web-based pop-up window titled "Process Follow Up Requests". It contains several input fields for transaction details: "Swipe Date" (3/2/2012), "Plan" (FSA2012), "Merchant" (Canada Chemists), "Transaction Amount" (\$1.26), and "Eligible Amount" (\$1.26). Below these is a "Note" field with a text area and a vertical scrollbar. A green progress bar is shown at 100%. Below the progress bar, text indicates "Uploading Canada Chemists Receipt.pdf. 81.6 KB of 81.6 KB at 749KB/s; 1 seconds remaining". There are three buttons at the bottom: "Cancel" (light grey), "Save" (light grey), and "Add Documentation" (blue). The "Add Documentation" button is highlighted.

Process Follow Up Requests

Swipe Date: 3/2/2012

Plan: FSA2012

Merchant: Canada Chemists

Transaction Amount: \$1.26

Eligible Amount: \$1.26

Note:

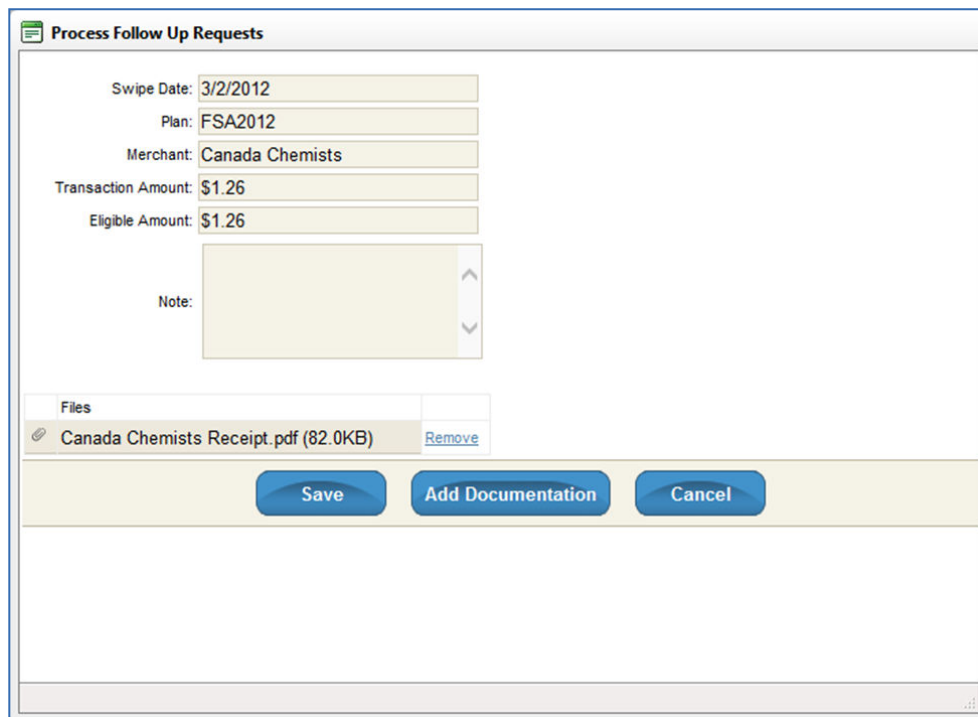
100%

Uploading Canada Chemists Receipt.pdf. 81.6 KB of 81.6 KB at 749KB/s; 1 seconds remaining

Cancel

Save Add Documentation Cancel

Click **SAVE** to submit the receipt or **CANCEL** to exit the screen. (Note that if you click **CANCEL**, the receipt is still associated with the transaction. It is not deleted unless you click the **Remove** link next to the receipt upload file.)



The screenshot shows a web form titled "Process Follow Up Requests". It contains several input fields: "Swipe Date" with the value "3/2/2012", "Plan" with "FSA2012", "Merchant" with "Canada Chemists", "Transaction Amount" with "\$1.26", and "Eligible Amount" with "\$1.26". Below these is a "Note" field with a text area and up/down arrows. At the bottom, there is a "Files" section showing a single file "Canada Chemists Receipt.pdf (82.0KB)" with a "Remove" link next to it. At the very bottom of the form are three buttons: "Save", "Add Documentation", and "Cancel".

When you click **SAVE**, you are returned to the **Debit Card** screen. Upon substantiation by **BASIC**, the transaction will be moved to the **Processed Transactions** table.

Work with Processed Transactions

All transactions for which you have submitted documentation are displayed in the **Processed Transactions** table on the **Purchases Needing Receipts** tab of the **Debit Card** screen.

Processed Transactions					
<input type="checkbox"/> Include Archived Transactions?					
	Purchase Date	Plan	Amount	Description	Status
View Detail	03/16/2012	FSA2012	\$2.30	Canada Chemists	Ineligible - Paid in Full
View Detail	03/15/2012	FSA2012	\$2.20	Canada Chemists	Eligible
View Detail	03/11/2012	FSA2012	\$1.80	Canada Chemists	CoPay Match
View Detail	02/18/2012		\$17.00	Canada Chemists	Ineligible - Paid in Full
View Detail	02/17/2012		\$16.00	Canada Chemists	Eligible
View Detail	01/31/2012	LFS2012	\$25.84	Canada Chemists	No Follow Up Required
View Detail	01/29/2012		\$16.31	Canada Chemists	CoPay Match
View Detail	01/29/2012	HRA2012	\$16.31	Canada Chemists	CoPay Match
Page size: 8					9 items in 2 pages

When you submit a receipt, BASIC must approve the receipt before the transaction can be cleared. Once BASIC has approved the receipt, the status in this table will be changed to “Approved”.

Approved transactions can be archived (or stored) so that you can hide completed transactions from the **Processed Transactions** table. To archive an item, click the **Archive** link corresponding to the transaction that you would like to archive. The transaction is immediately moved to the archive. To view archived items, check the “Include archived Transactions?” checkbox. If the checkbox is not checked, Archived transactions will not be displayed in the **Processed Transactions** table. This helps to only show the most recent or relevant information.

View Card Activity

The **Card Activity** tab of the **Debit Card** screen displays a grid containing all debit card transactions that you have made with the card. Eight transactions are shown per page in chronological order. To view transactions before the eight displayed, use the number links at the bottom of the table to navigate through your older transactions.

The screenshot shows a web application interface. At the top is a navigation bar with tabs: Home, Claims (selected), Status, Profile, Resources, and Contact Us. Below this is a secondary navigation bar with icons and labels: Claims Home, Submit a Claim, Claims History, and Debit Card (selected). The main content area is titled 'Claims > Debit Card'. Below this title are three sub-tabs: Card Information, Purchases Needing Receipts, and Card Activity (selected). A message states: 'The list below shows purchases made with your benefits debit card. To see additional information regarding your purchases, click the View button next to the transaction date.' Below the message is a table with the following data:

	Transaction Date	Plan	Amount	Description	Status	Note
View	03/10/2012		\$8.22	Canada Chemists	Eligible	
View	03/08/2012	FSA2012	\$1.50	Canada Chemists	Ineligible	
View	03/07/2012	FSA2012	\$1.40	Canada Chemists	Ineligible - Paid in Full	
View	03/06/2012	FSA2012	\$1.30	Canada Chemists	Unrecovered Overpayment	
View	03/05/2012	FSA2012	\$1.29	Canada Chemists	Eligible	
View	03/04/2012	FSA2012	\$1.28	Canada Chemists	Documentation Required	
View	03/03/2012	FSA2012	\$1.27	Canada Chemists	Eligible	
View	03/02/2012	FSA2012	\$1.26	Canada Chemists	Documentation Required	

At the bottom of the table is a pagination control showing 'Page size: 8' and '23 items in 3 pages'.

To view additional details about a specific transaction, click the **VIEW** link on the line of the transaction about which you would like additional information. The Card Transaction Details for that item will be shown in a pop-up window:

Claims > Debit Card

Card Information

The list below shows purchases made with your card. Click the View button next to the transaction date.

Transaction Date	Transaction Amount	Merchant	Status	Note
View 03/10/2012			Eligible	
View 03/08/2012			Ineligible	
View 03/07/2012			Ineligible - Paid in Full	
View 03/06/2012			Unrecovered Overpayment	
View 03/05/2012			Eligible	
View 03/04/2012	FSA2012 \$1.28	Canada Chemists	Documentation Required	
View 03/03/2012	FSA2012 \$1.27	Canada Chemists	Eligible	
View 03/02/2012	FSA2012 \$1.26	Canada Chemists	Documentation Required	

Card Transaction Detail

Swipe Date: 3/7/2012

Plan: FSA2012

Merchant: Canada Chemists

Transaction Amount: \$1.40

Request Status: Ineligible - Paid in Full

Eligible Amount: \$1.00

Ineligible Amount: \$0.00

Amount Paid: \$0.40

[Cancel](#)

Page size: 8 23 items in 3 pages

View Card Information

On the **Card Information** tab of the **Debit Card** screen, you can see your card status and activation date.

Home **Claims** Status Profile Resources Contact Us

[Claims Home](#) [Submit a Claim](#) [Claims History](#) [Debit Card](#)

Claims > Debit Card

Card Information Purchases Needing Receipts Card Activity

The Card Information tab displays benefits, debit card status, and personal account information. You can also use this area to report your debit card lost or stolen.

Card Status

Card Status: Active

Card Activation Date: 2/25/2011

Member Information

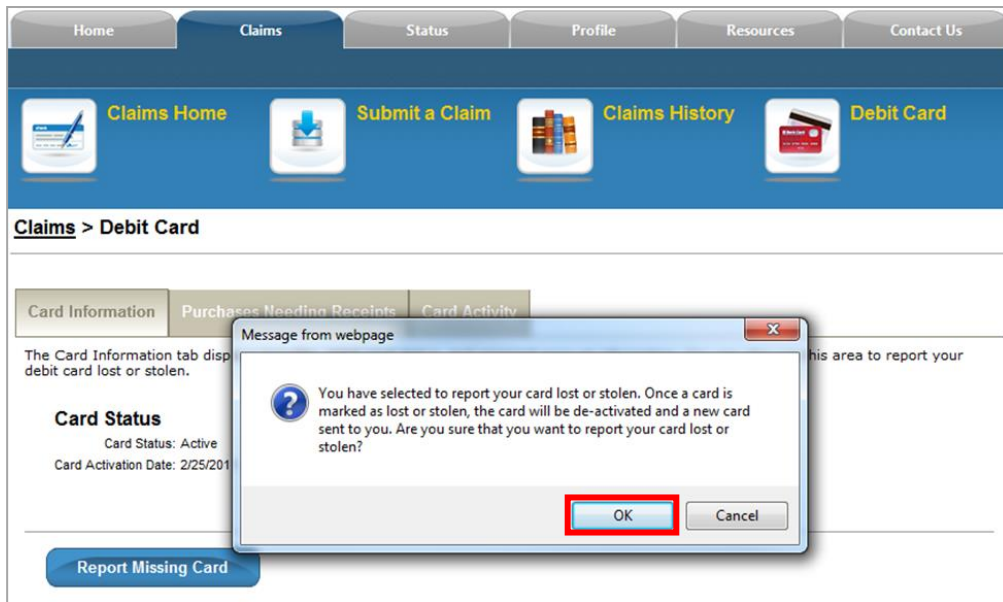
XXXXXX1023

GRAY, GRETCHEN

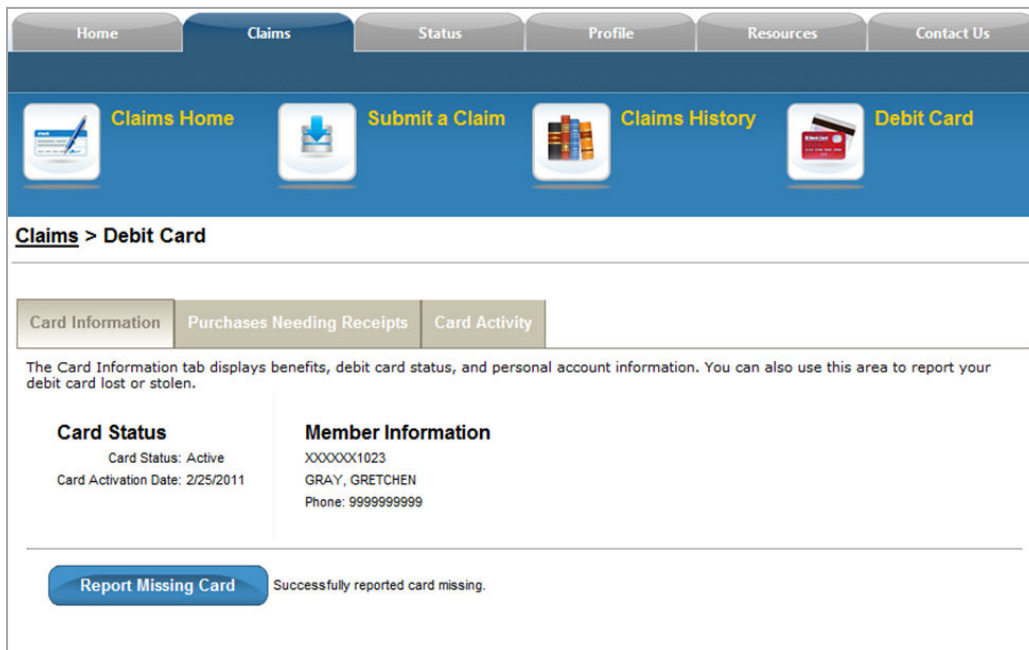
Phone: 9999999999

Report a Missing Card

To report a missing card (lost or stolen), go to the **Card Information** tab and click REPORT MISSING CARD. An alert message will appear confirming the decision to report a card as lost or stolen. Click OK.



After a short delay, a confirmation message will be displayed:



The confirmation message indicates your card has been logged as missing. The missing card will be deactivated and a new replacement card will be sent to you.

Maintaining Your Personal Profile and Login Credentials

Maintaining your profile makes it faster and easier to process your claims and send you reimbursement. Your personal profile contains information about you and your dependents.

Change Your Personal Profile

Navigate to the **View/Edit Profile** page by selecting the **View/Edit Profile** link from the **Profile** section of the top navigation menu or by selecting the **Profile** tab and clicking on the **View/Edit Profile** icon.



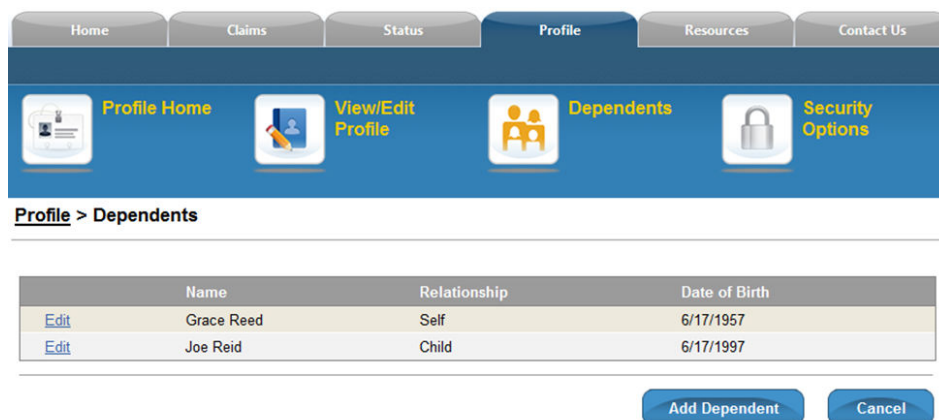
To update your profile, make the desired changes by clicking in the corresponding field, modifying it, and selecting SAVE. Your changes will be submitted to the Company Benefits Administrator for approval. Once your changes are approved by the Company Benefits Administrator, they will be added to your permanent record.

Modify, Add, or Remove Dependents

Navigate to the **Dependents** page by selecting the **Dependents** link from the Profile section of the top navigation menu on the home page or by selecting the **Profile** tab and clicking on the **Dependents** icon.



From here, you can modify the individual profile of each family member or you can add a dependent.



- To modify a dependent, click the **Edit** link on the same row as the dependent's name, type or select the appropriate information into all required fields, then click SAVE.

Your changes must be approved by either your Company Benefits Administrator or by BASIC before being saved to your permanent record.

Profile > View/Edit Profile

Enter personal information into the form provided below. Required items are marked with an asterisk (*).

Member ID: *	XXX1018	Address 1:	5546 Grand Blvd	Check All that Apply <input checked="" type="checkbox"/> Student <input type="checkbox"/> Other Coverage If Other Coverage, specify:
Secondary ID:		Address 2:	Suite B	
SSN:	1001018	City:	Madison	
First Name: *	Joe	State:	Wisconsin	
Middle Initial:	J	Zip Code:	53701	
Last Name: *	Reid	Country:	--Select One--	
Relationship:	Child	Phone:	(608) 555-2121	
Sex:	Male	Fax:	(608) 555-3262	
Birth Date:	6/17/1997	HICN:	564212564	
Marital Status:	M	Email Address:		
		Don't send me notifications:	<input checked="" type="checkbox"/>	

Save **Cancel**

- To add a dependent, click the ADD DEPENDENT button below the **Member Family** table.

Profile > Dependents

	Name	Relationship	Date of Birth
Edit	Grace Reed	Self	6/17/1957
Edit	Joe Reid	Child	6/17/1997

Add Dependent **Cancel**

- The **View/Edit Profile** form will open, with a dependent **Relationship** type of “child” selected. Some fields, such as last name and address, are automatically populated into the form using your last name and address information; however, these fields can be modified. Add or modify the required information to add your dependent and click **SAVE**.

The added dependent must be approved by either your Company Benefits Administrator or by BASIC before being saved to your permanent record.

Profile > View/Edit Profile
Enter personal information into the form provided below. Required items are marked with an asterisk (*).

Member ID: *	XXX1018	Address 1:	5546 Grand Blvd	Check All that Apply <input type="checkbox"/> Student <input checked="" type="checkbox"/> Other Coverage If Other Coverage, specify: Aflac
Secondary ID:		Address 2:	Suite B	
SSN:	100471018	City:	St. Louis	
First Name: *		State:	Missouri	
Middle Initial:		Zip Code:	63101	
Last Name: *	Reed	Country:	--Select One--	
Relationship:	Spouse	Phone:	(314) 555-2012	
Sex:	None Specified	Fax:		
Birth Date:		HICN:		
Marital Status:	None Specified	Email Address:		
		Don't send me notifications:	<input type="checkbox"/>	

Save **Cancel**

Changing your Username and Password

Navigate to the **Security Options** page by selecting the **Security Options** link from the Profile section of the top navigation menu on the home page or by selecting the **Profile** tab and clicking on the **Security Options** icon.



Use the available fields to change your username, password, or the answers to your security questions. You can only change one of these at a time.

*****You must submit each change separately before you can move on to change the next option.*****

Note the following requirements for usernames and passwords:

- **Username**— Your Username must be at least 4 characters and is **NOT Case Sensitive**
- **Password**—Your Password must be at least 6 characters and is **Case Sensitive**

Profile > Security Options
Enter security preferences into the form provided below. All fields are required.

Change Username

Current Username: 1001003

New Username: * must be at least 4 and no more than 15 characters.

Change Password

Current Password: *

New Password: * must be at least 6 and no more than 20 characters.

Confirm Password: *

Answer Security Questions

What was the model of your first car? *

Where did your parents go on their honeymoon? *

Accessing Forms and Letters

BASIC will determine which forms are available to you. To view available forms, navigate to the **Forms & Letters** page by selecting the **Forms & Letters** link from the **Resources** section of the top navigation menu on the home page or by selecting the **Resources** Tab and clicking on the **Forms & Letters** icon.



Some of the forms for your benefits program may be available in the **Document Library**. Check with your Company Benefits Administrator if you do not see the form you need. To open a form navigate to the **Document Library** and click one of the document links.

