UPGRADE

Q: What is BASIC's Consumer Driven Accounts system?

A: BASIC's Consumer Driven Accounts system is the smart, easy and connected way to manage benefits. Choose from more than 30 integrated accounts to build the benefit offering that best meets the needs of your employees and organization—with the ability to easily switch accounts at any time. One website, one mobile app and one card removes the complexity common with managing multiple benefit accounts. Information is entered once, no matter how many benefit accounts you choose, increasing accuracy and efficiency. BASIC's Consumer Driven Accounts system offer employers a new way to manage benefits.

Q: What does it mean to upgrade?

A: It means you're being upgraded to a new and improved web, mobile and card experience! By upgrading to the new Consumer Driven Accounts, you will be able to manage all your BASIC benefits in one place and add or change accounts as your business needs grow and change. To learn more, visit our online Client CDA site.

Q: Do I have to upgrade?

A: Yes. All clients are being upgraded to the new experience. The current platform will no longer be accessible in the near future.

Q: What should I expect in the new experience?

A: You will be able to use the Consumer Driven Accounts system to manage multiple BASIC accounts in one place. The web experience features a fresh new look with important account information upfront. Most frequently performed tasks are located on the homepage and intuitive to use, making managing your benefits quick and easy. In addition, your participants will experience an intuitive website and mobile app, making account management easier wherever they go. Participants will also receive a new BASIC Card—one card that works across all BASIC benefit accounts.

Q: How will this upgrade impact the work I do as an administrator?

A: You will still be able to do everything you do today—and much more! To make sure you are comfortable with how to sign in and use the upgrade system, please visit our helpful online Client CDA site. Also, be on the lookout for additional information and instructions via email.

Q: How will this impact my employees?

A: They too will be introduced to the new experience, which includes web, mobile and card. They will receive email and mailed communications, plus have access to the online Employee CDA site. And—most exciting—they will experience many new features with the new Consumer Driven Accounts system:
- MyCash
- BASIC Card Lock
- Picture to Pay (mobile version) and Pay the Provider (web version)

Q: Will I be able to access transaction information that occurred prior to Upgrade?

A: Yes, you will still have access to the legacy system for at least 90 days after the upgrade. To ensure financial confidence, we will not carry past transactions into the new Consumer Driven Accounts system.

SIGN IN

Q: How do I sign into my new account?

A: Sign in at http://cdaclient.basiconline.com/. Use your email address as your username. Before signing in for the first time, you must **sign up** for an account. To do so, click the green **sign up** link, then enter your email and create a password.

Q: Can I use my old platform login credentials to sign in to Consumer Driven Accounts?

A: No. Your previous login credentials will not work in the new Consumer Driven Accounts system. You must "sign up" for an account and then sign in with your email address and password.

Q: What internet browser should I use?

A: Chrome is the recommended browser.

Q: If I am the client administrator and am enrolled as a participant in one of the benefit plans, how do I sign in?

A: You may use the same email address for both your client sign in and your participant sign in.

- First, sign up as a client (click the white box on the right side of the Welcome page) to establish your new account.
- Then, to access your participant account (click the green box on the left side of the Welcome page), enter the same email and password you used for your client access.

ACCOUNT MANAGEMENT

Q: Where do I find information on how to perform administrator functions?

A: Please visit the online Client CDA site for helpful materials on how to manage employee status, run a report, or upload a file. The site contains a variety of ways to learn how to navigate and perform administrative functions within the new Consumer Driven Accounts system.
- Watch a prerecorded webinar
- Read the Client Administration Manual

Q: Where do I find information on the common administrative functions?

A: Here are some shortcuts to information covered in the Administration Manual:

- **How do I verify or make edits for my next payroll amount?**
  - Click Benefit Plans
    - Click Verify Posting (PVR)

- - Click green arrow to see all contributions for employees participating in multiple benefit plans.
    - Update the contribution
    - Click save
  - **Where are my reports?**
    - From your online account, go to the Reporting tab; the following reports are currently available:
      - **Enrollment Report** – lists current participants enrolled by plan and election
        - Plan name
        - Plan description
        - Plan ID
        - Benefit plan years
        - Individual IDs
        - Demographic information
        - Enrollment dates
        - Eligibility start dates
        - Individual election amounts
        - Employer election amounts
      - **Funding Report** – ties to a funding event and shows detail of ACH (PVR/POD events)
      - **Request Payment Detail** – list claims paid for each employee (does not show service provider)
  - **Where can I see current balances for an individual employee?**
    - From your online account, go to the Employee Tab, select the employee whose balance details you want to view, and click on their Employee Accounts Summary.

Q: Do I need to provide an enrollment file if I already provided an employee census file?

A: Yes, you need to add your census file before the enrollment. Adding your census file simplifies future enrollment and communications, provides effortless COBRA enrollment, and makes adding other benefit accounts seamless. Plus, the new Consumer Driven Accounts system offers accounts that do not require an employer sponsor, such as Health Savings Accounts and GiveBack Workplace Giving; therefore, having census information allows participants to continue their non-employer sponsored benefit accounts indefinitely.

BASIC CARD

Q: When will plan participants receive their new BASIC Card?

A: BASIC Cards will be automatically issued to participants and dependents. Participants should watch for their card to arrive in a plain white envelope to the address listed in their account profile.

Q: Do participants need to activate their new BASIC Card?

A: No, the BASIC Card comes activated and ready to use. Participants can use it to pay for eligible expenses as soon as their plan is live on the new Consumer Driven Accounts system. They should watch for a welcome email with more information.

Q: Can participants get a BASIC Card for their spouse and/or dependents?

A: Yes, participants can request a BASIC Card for their spouse and/or dependents from their account via the website or mobile app.

Q: What if a participant misplaces their card?

A: They can put a temporary lock on their BASIC Card. When they find their card, they can unlock it with the click of a button—all from the website or mobile app.

Q: What if a card is lost or stolen?

A: Participants must sign into their account to report it lost/stolen. The card will be immediately deactivated, and a new card issued.