



PARTICIPANT FREQUENTLY ASKED QUESTIONS

UPGRADE

Q: What is Consumer Driven Accounts?

A: Consumer Driven Accounts is the smart, easy and connected way to manage benefits. There's only one website, one mobile app and one card to keep track of, so you don't have to remember a bunch of passwords—and your money and information are safe. The Consumer Driven Accounts system is a fresh, modern approach to employee 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 Consumer Driven Accounts, you will be able to manage all your BASIC benefit accounts in one place with one BASIC Card. To learn more, visit our online [Employee CDA page](#).

Q: When will my account be upgraded to the new website?

A: Dates will be communicated via email. Please make sure your email is up-to-date in your current participant account profile.

Q: What should I expect in the new experience?

A: You will be able to use the new 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. Plus, the new mobile app makes account management easier wherever you go. You will also receive a new BASIC Card—one card that works across all BASIC benefit accounts—and features MyCash, Card Lock, and more!

BASIC CARD

Q: When will I receive my new BASIC Card?

A: BASIC Cards will be automatically issued to you. Please watch for your card(s) to arrive in a plain white envelope to the address listed in your account profile. (Please make sure your mailing address and email address are up-to-date in your account profile.)

Q: Do I need to activate my new BASIC Card?

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

Q: Can I get a BASIC Card for my spouse and/or dependents?

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



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Q: What if I misplace my card?

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

Q: What if my card is lost or stolen?

A: Please sign in to your account to report it lost/stolen. Your card will be immediately deactivated and a new card issued.

Q: Why do I have to substantiate this card purchase? I did not have to substantiate in the old system.

A: The new Consumer Driven Accounts system auto-verifies most purchases based on the card transaction data. In some cases, more information is needed to verify that a purchase is an eligible benefit expense.

SIGN IN

Q: How do I sign in to my new account?

A: Sign in at <https://www.cda.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 (under the Terms and Conditions), then enter your email and create a password.

Q: What internet browser should I use?

A: Chrome is the supported browser.

Q: Can I use my current system credentials to sign in to the new Consumer Driven Accounts system?

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

ACCOUNT MANAGEMENT

Q: How do I view my benefit accounts?

A: All your benefit accounts are listed in your account overview. Click View All to see total contributions and expenditures across all accounts.

Q: How do I view my account balances?

A: You can view your balances anytime from your account overview page or benefit accounts page or using the new BASIC benefits mobile app.

Q: How do I submit a reimbursement request?

A: You can conveniently submit a reimbursement request from your account or the free BASIC benefits mobile app. To eliminate the need to submit reimbursement requests, use your BASIC Card to pay for eligible expenses at the point of purchase.

Q: How do I get the new BASIC benefits mobile app?



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A: Download the free BASIC benefits mobile app from the App Store or Google Play. Search for “BASIC benefits app” and click the blue BASIC logo.

Q: I forgot to use my BASIC Card to pay for an eligible expense and submitted a reimbursement request. How and when will I get reimbursed?

A: Your reimbursement funds are deposited in your MyCash account—requests under \$50 are deposited within the hour and amounts over \$50 are usually available within 24-48 hours. Access your MyCash funds by swiping your BASIC Card at merchants that accept Mastercard, withdraw at an ATM using the BASIC Card (and a PIN), transfer to a personal bank account from your BASIC account, or donate to a favorite charity from your individual giving account.

Q: I received a notification that I must submit verification for a transaction. How do I submit verification?

A: From your account, click the green Attach Verification button next to the transaction to upload a receipt. Verification must include (1) provider/merchant name, (2) date of service, (3) description, and (4) amount.

Q: How do I set up direct deposit?

A: If you had direct deposit set up in WEX, it will be carried forward to your new Consumer Driven Accounts system. To schedule a balance transfer, sign in to your account and follow the steps on the Overview page under MyCash balance (upper right corner).

Q: Where can I find the paper request for reimbursement form?

A: A paper request for reimbursement form can be requested by submitting a support request (from your account, click Contact Us), or by calling Customer Service. Otherwise, please submit your requests through our easy to use website or mobile app.

Q: Where can I find my past transactions?

A: The legacy system will be available for at least 90 days after upgrade. You will need to log into the prior online account in order to view your past transactions.

Q: How do I pay bills online?

A: From your website account, click Pay a Provider, or from your mobile app, click Picture to Pay. Provide the requested information and click submit/ BASIC will pay your service provider from your benefit account.