HSA CONSUMER PORTAL QUICKSTART GUIDE

TRANSAMERICA®

Welcome to your Transamerica Benefit Accounts Portal. This will be a one-stop portal to give you 24/7 access to view information and manage your Transamerica Health Savings Account (HSA). It will let you:

- File a claim online
- Upload receipts and track expenses
- View up-to-the-minute account balances
- Invest and manage your HSA investments
- 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
- Access plan information, forms, and notifications

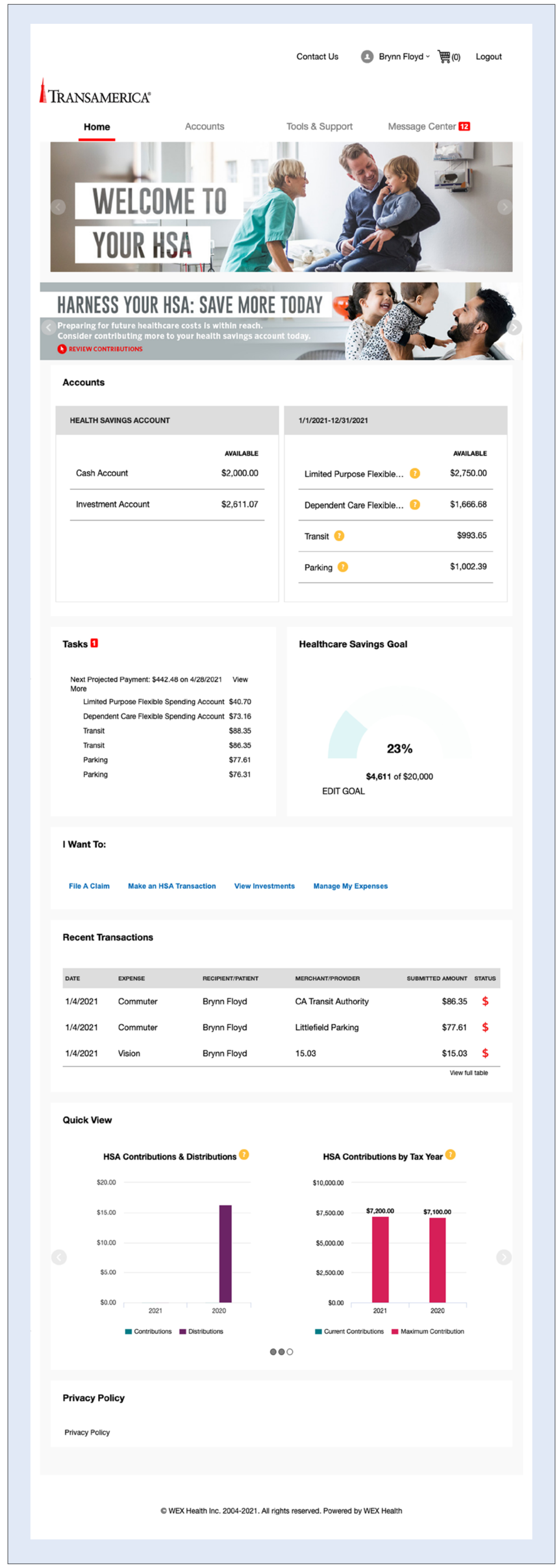
Log in

1. Go to **transamerica.com/portal**
2. Enter your username and password (associated with your Transamerica account)
3. Click **Log In**

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 **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 displays some of your key account information

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



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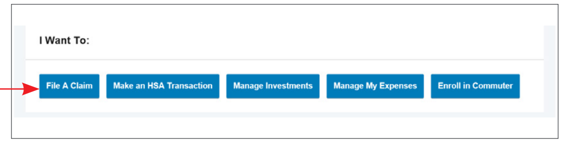
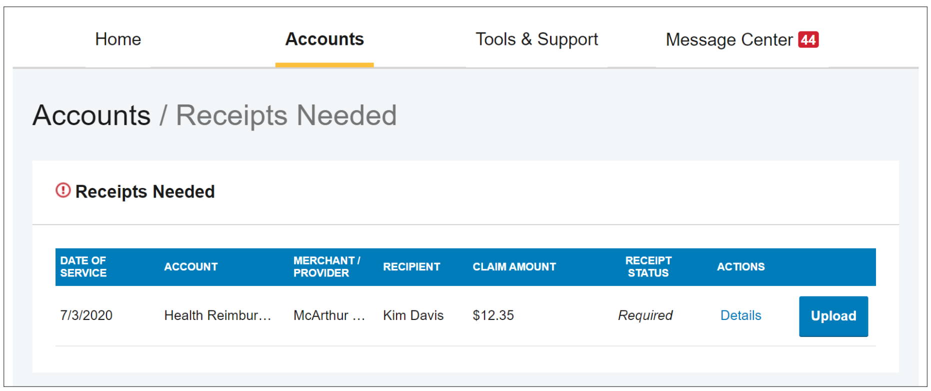
File a claim and upload receipts

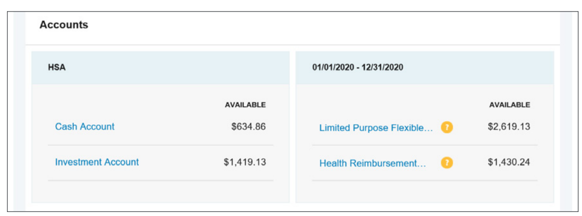


1. On the **Home Page,** select the "**File a Claim**" under the **I Want To** section. Or, from any page on the portal, expand the **Accounts** tab on the top of the screen.
2. The claim filing wizard will walk you through the request, including entry of information, payee details, and uploading a receipt
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 and click **Submit** to send the claims for processing
5. The **Claim Confirmation** page displays. You can 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.



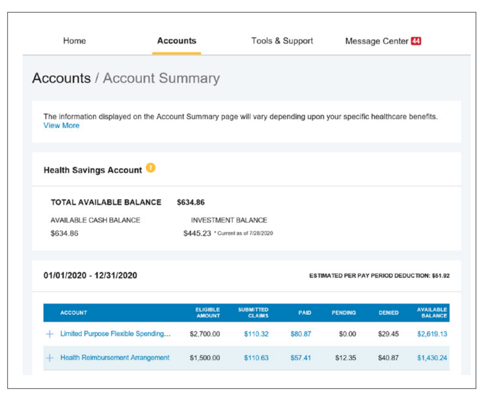
NOTE: If you see a **Receipts Needed** link in the **Tasks** section of your **Home Page**, click it. You will be taken to the **Claims** page where you can see the claims that require documentation. You can easily upload the receipts from this page. Simply click to expand the line item to view claim details and the **upload receipts link**.

View current account balances and activity



1. For current account balance only, see the **Accounts** section on the **Home Page**
2. For all account activity, click the **Accounts** tab from the **Home Page** to bring you to the **Account Summary** page. You can 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.



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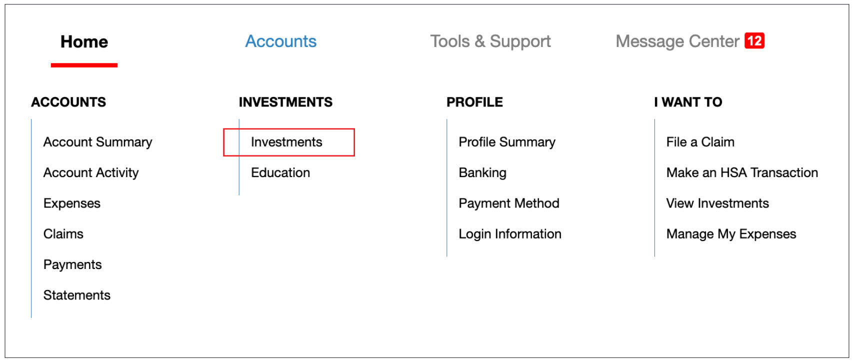
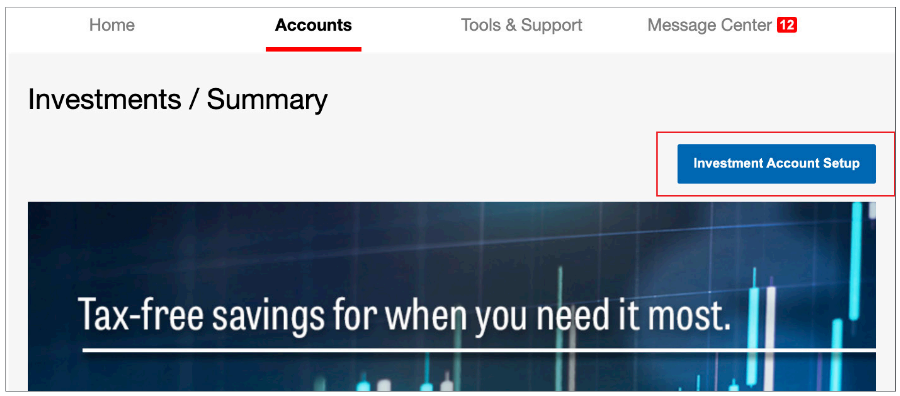
Invest your account balance

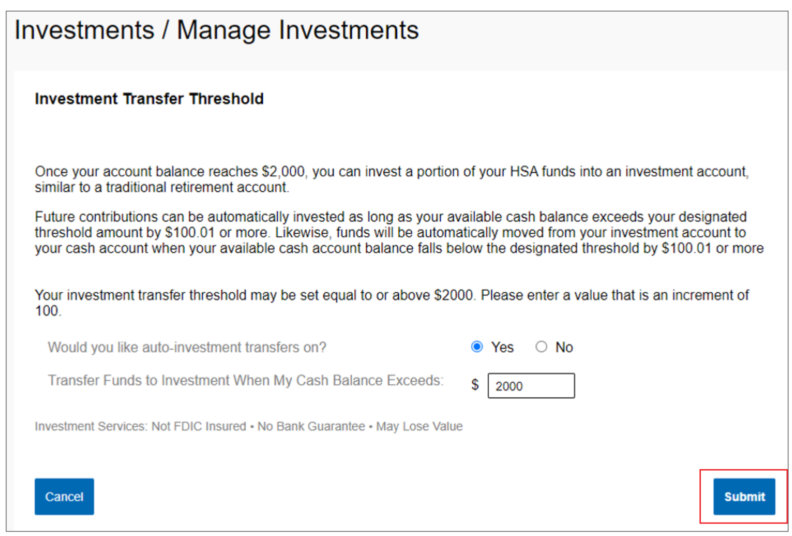
1. Hover over the **Accounts** tab and click **Investments** under the **Investments** menu



2. If you're ready to start investing, click **Investment Account Setup** button



3. On the next screen, you will need to select "Yes" to turn auto-investment transfers on in order for you to be able to set up your investment account. Once your investment account is set up, you will have the ability to turn auto-investment transfers off. The default investing threshold amount is $2,000, but you can adjust the threshold to be higher if you'd like. Once you're done, click **Submit**.



Once you've set up your investment account, you'll see an expanded menu allowing you to manage investments, review portfolio performance, see your balance history, and more.

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All healthcare 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 **filter options** on the navigation pane on the left side of the screen or by clicking the **field headers** within the **Dashboard**
3. Expenses can be exported to an Excel spreadsheet by clicking the **Export Expenses** button at the top of the page

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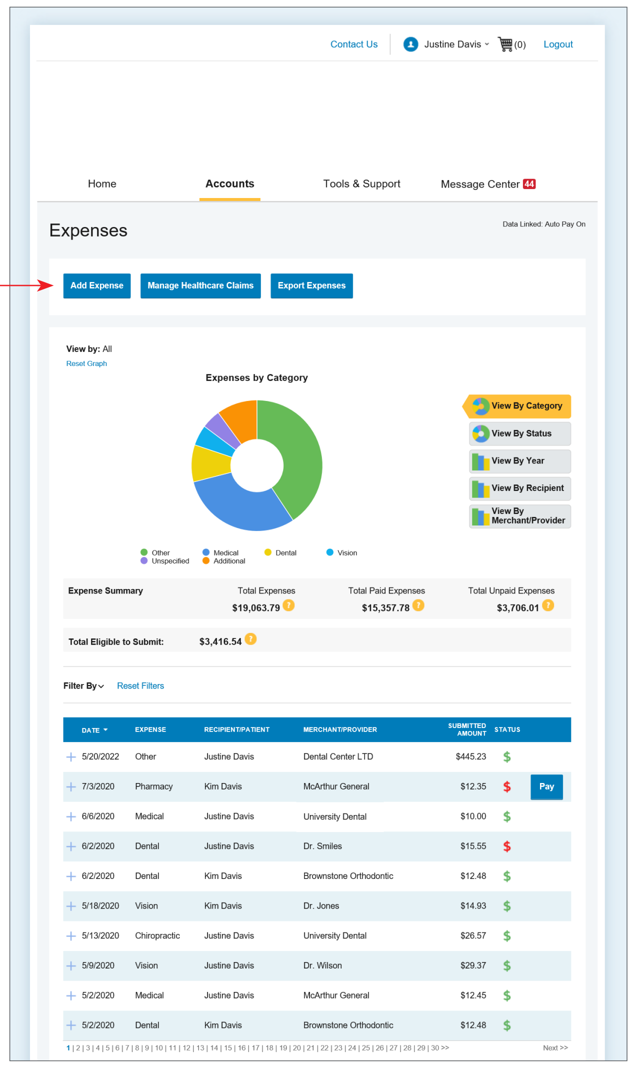
Add an expense to the dashboard

1. From the **Dashboard**, click the **Add Expense** button at 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



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Pay an expense

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

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

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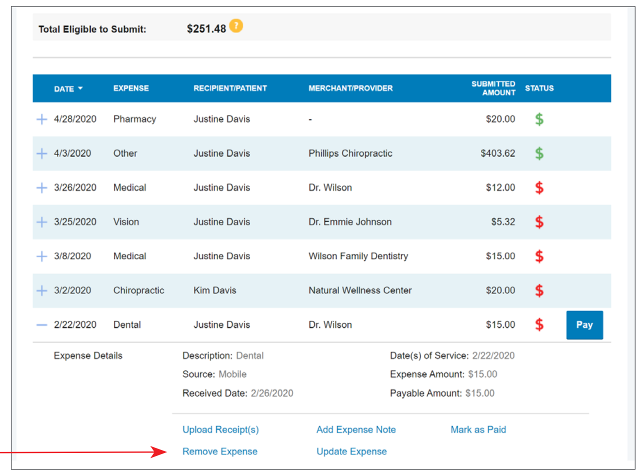
Edit an existing expense

1. You can edit expense details for all claim statuses directly from the **Dashboard**
2. Expand the claim details visible by clicking 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**



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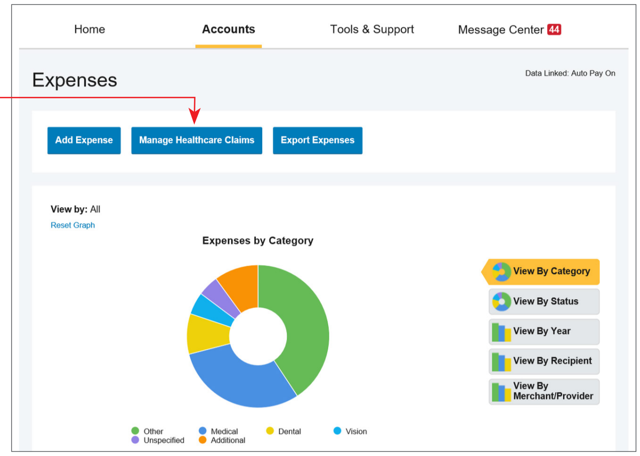
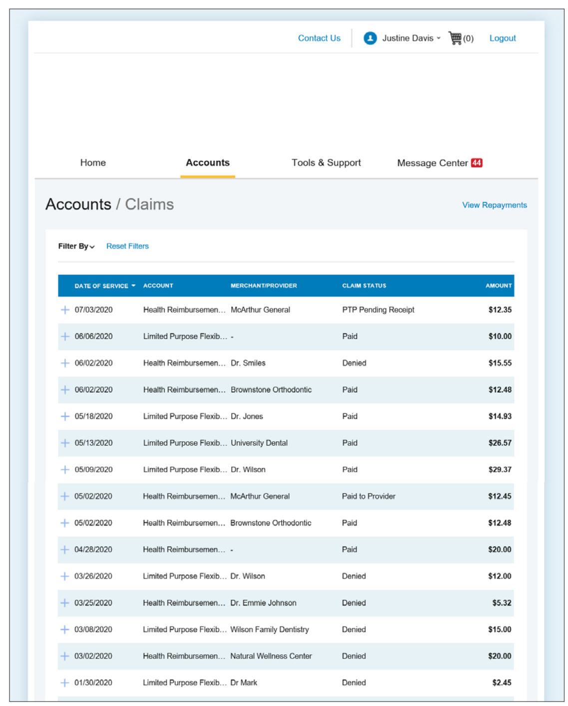
Link healthcare claims

1. **Manage Healthcare Claims** allows you to receive claims data from your healthcare insurance carriers
2. Expenses from your insurance carrier(s) will be added to the **Dashboard** for tracking and/or payment purposes
3. To register, click the **Manage Healthcare Claims** button located at the top of the **Dashboard**
4. You will be alerted to new expenses within the message area of the consumer online portal and mobile app



View claims history and status

1. From the **Home Page**, click the **Accounts Tab**, and then click 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?

You can 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 can also search for a specific expense by entering a description into the search field.

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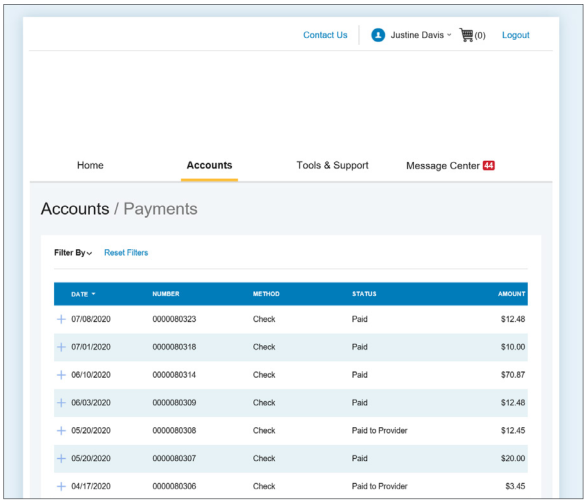

View payment and reimbursement history

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

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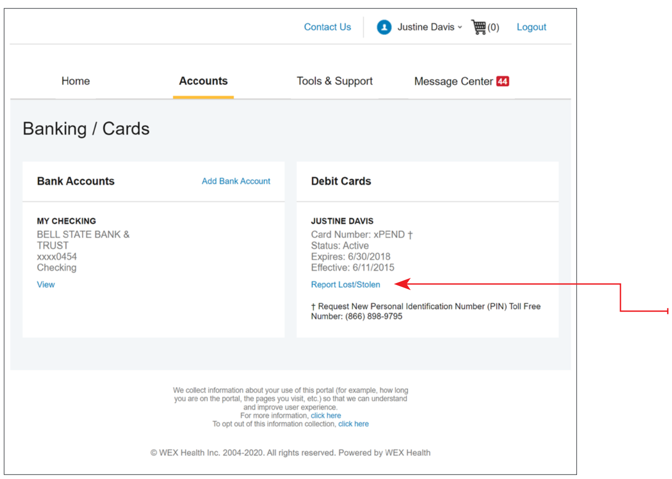

Report a missing debit card or request a new card

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 the instructions

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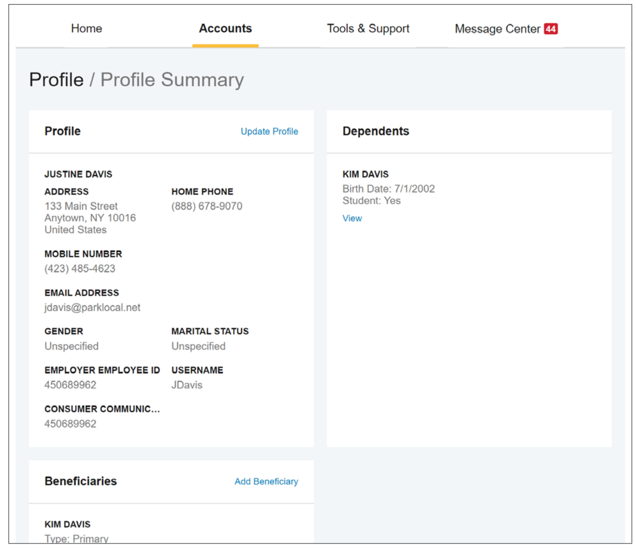
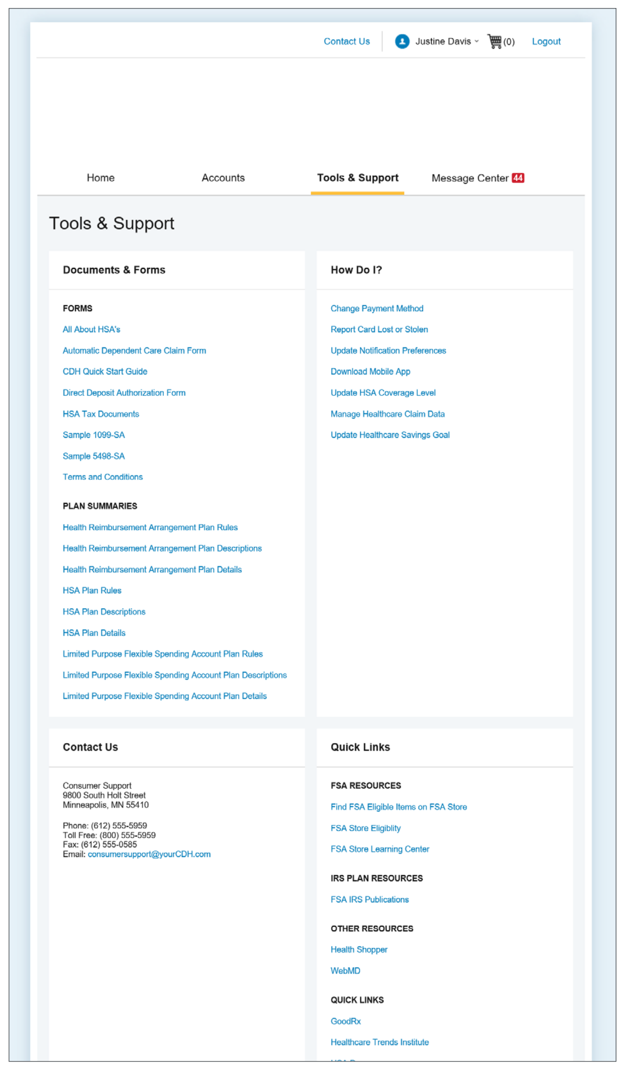
Update your profile



1. From the **Home Page**, under the **Accounts Tab**, you will find links to update profile information, including profile summary details, dependents, and beneficiaries
2. Click the appropriate link under **Profile** for your updates: **Update Profile** or **Add 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**

Get reimbursed faster



THE FASTEST WAY TO GET YOUR MONEY IS TO SET UP DIRECT DEPOSIT TO YOUR PERSONAL CHECKING ACCOUNT. BEFORE YOU BEGIN, MAKE SURE 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

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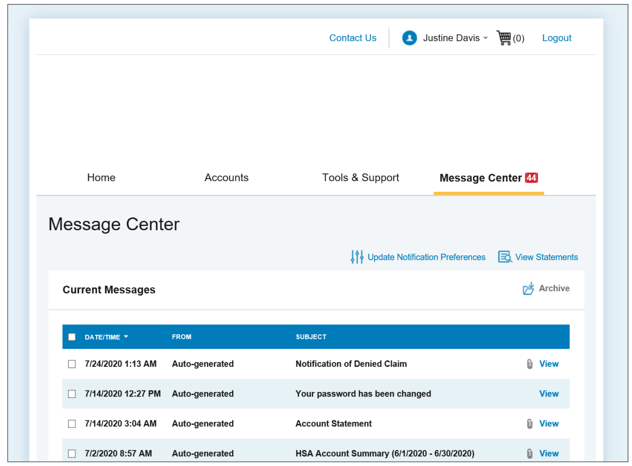
Other available information

DOCUMENTS & FORMS

1. From the **Home Page**, click the **Tools & Support** tab
2. Click any form or document of your choice

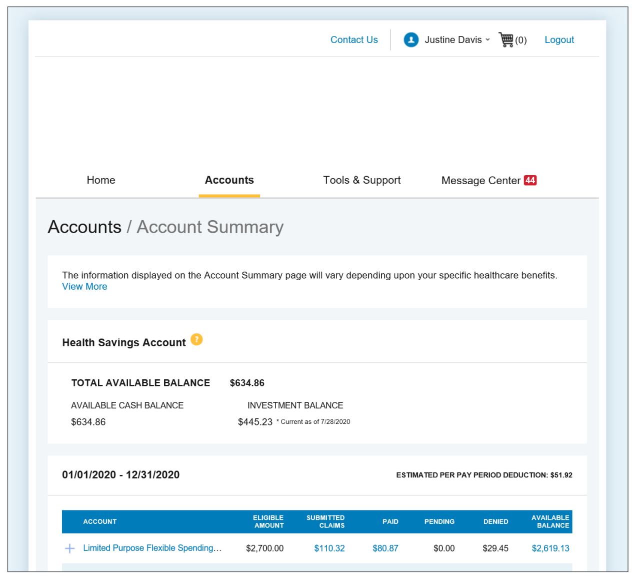
NOTIFICATIONS

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 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 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 can view **Plan Summaries** for basic information. Then click each applicable plan to see the plan details.



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If you have questions, please contact our Customer Care Center at 833-571-0504. Representatives are available weekdays from 8 a.m. to 8 p.m. ET.

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