



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.

TRANSAMERICA

Contact Us Brynn Floyd Logout

Home Accounts Tools & Support Message Center

WELCOME TO YOUR HSA

HARNESS YOUR HSA: SAVE MORE TODAY

Preparing for future healthcare costs is within reach. Consider contributing more to your health savings account today.

REVIEW CONTRIBUTIONS

Accounts

HEALTH SAVINGS ACCOUNT		1/1/2021-12/31/2021	
	AVAILABLE		AVAILABLE
Cash Account	\$2,000.00	Limited Purpose Flexible...	\$2,750.00
Investment Account	\$2,511.07	Dependent Care Flexible...	\$1,666.68
		Transit	\$993.65
		Parking	\$1,002.39

Tasks

Next Projected Payment: \$442.48 on 4/28/2021 View More

Limited Purpose Flexible Spending Account	\$42.70
Dependent Care Flexible Spending Account	\$73.16
Transit	\$86.35
Transit	\$86.35
Parking	\$77.61
Parking	\$76.31

Healthcare Savings Goal

23%

\$4,611 of \$20,000

EDIT GOAL

I Want To:

[File A Claim](#) [Make an HSA Transaction](#) [View Investments](#) [Manage My Expenses](#)

Recent Transactions

DATE	EXPENSE	RECIPIENT/PAYEE	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS
1/4/2021	Commuter	Brynn Floyd	CA Transit Authority	\$86.35	\$
1/4/2021	Commuter	Brynn Floyd	Littlefield Parking	\$77.61	\$
1/4/2021	Vision	Brynn Floyd	15.03	\$15.03	\$

View full table

Quick View

HSA Contributions & Distributions

Year	Contributions	Distributions
2021	\$0.00	\$0.00
2020	\$0.00	\$15.00

HSA Contributions by Tax Year

Year	Current Contributions	Maximum Contribution
2021	\$7,200.00	\$7,200.00
2020	\$7,100.00	\$7,100.00

Privacy Policy

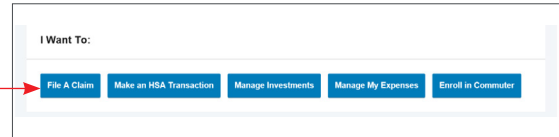
Privacy Policy

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All screen images are examples only and do not reflect the experience of any particular user.

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.



DATE OF SERVICE	ACCOUNT	MERCHANT / PROVIDER	RECIPIENT	CLAIM AMOUNT	RECEIPT STATUS	ACTIONS
7/3/2020	Health Reimbur...	McArthur ...	Kim Davis	\$12.35	Required	Details Upload

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.

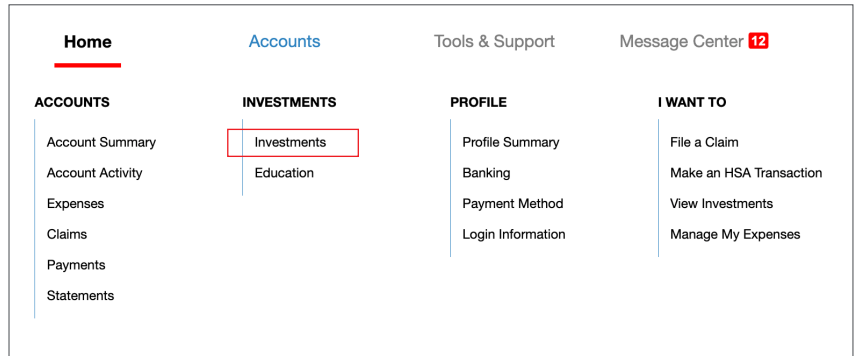
HSA	01/01/2020 - 12/31/2020
AVAILABLE	AVAILABLE
Cash Account \$634.86	Limited Purpose Flexible... \$2,619.13
Investment Account \$1,419.13	Health Reimbursement... \$1,430.24

ACCOUNT	ELIGIBLE AMOUNT	NEW/REDO CLAIMS	PAID	FORGONE	DENIED	AVAILABLE BALANCE
+ Limited Purpose Flexible Spending...	\$2,700.00	\$110.32	\$80.87	\$0.00	\$20.45	\$2,619.13
+ Health Reimbursement Arrangement	\$1,500.00	\$110.83	\$57.41	\$12.35	\$40.87	\$1,430.24

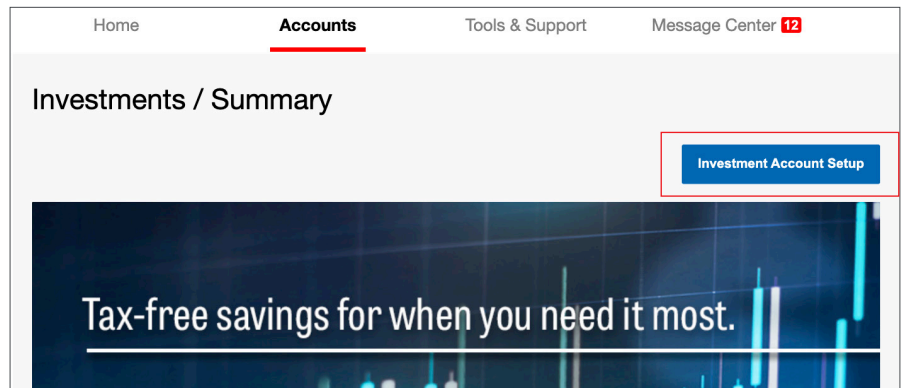
All screen images are examples only and do not reflect the experience of any particular user.

Invest your account balance

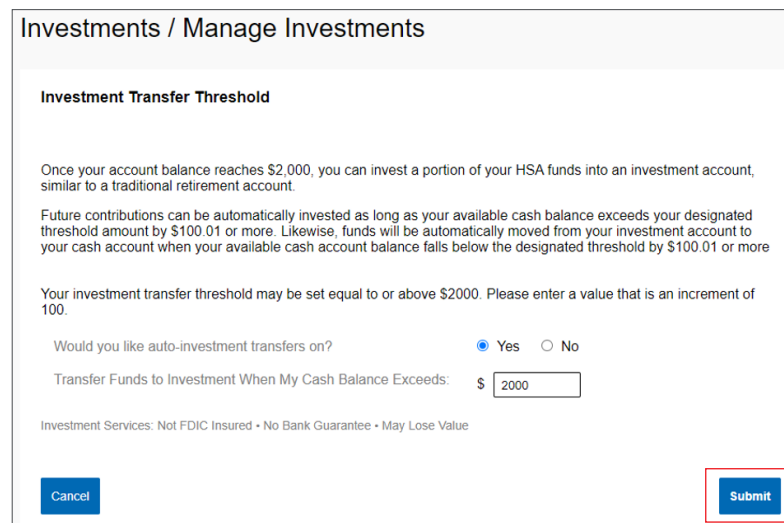
1. Hover over the **Accounts** tab and click **Investments** under the **Investments** menu



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.

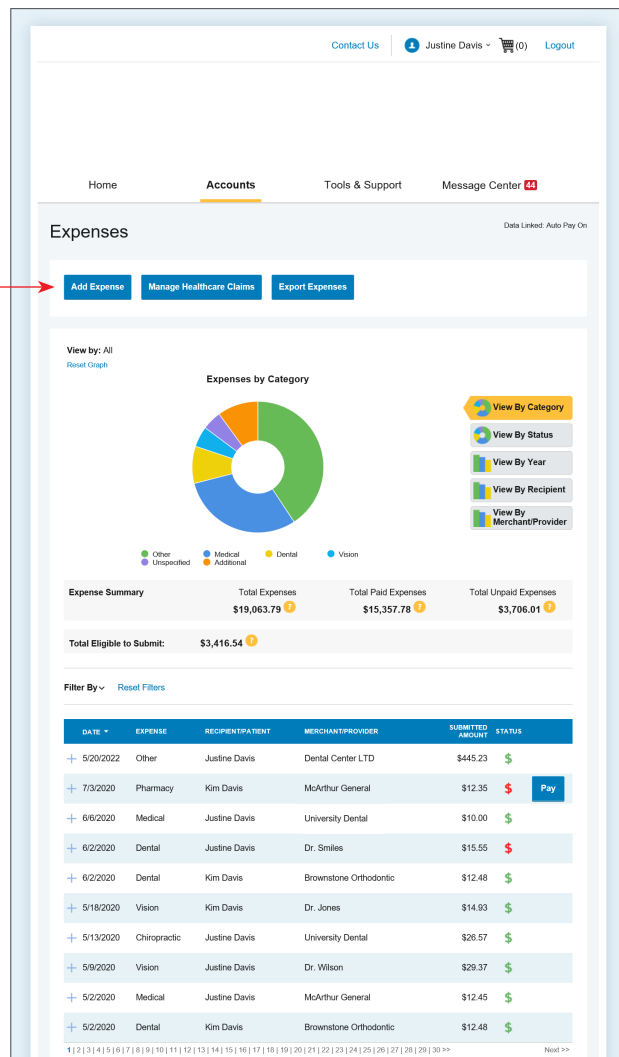
All healthcare expense activity in one place

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

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

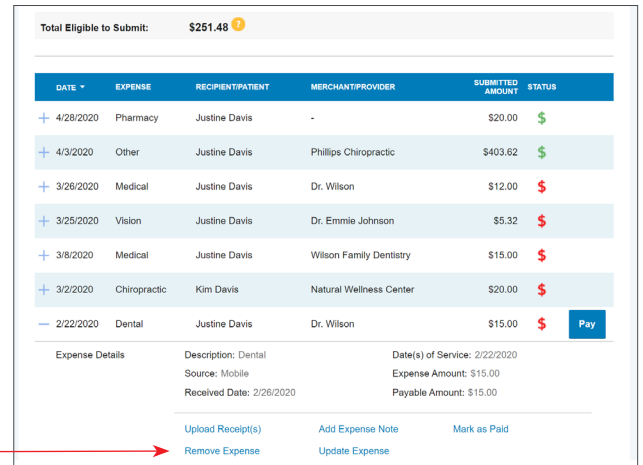


Pay an expense

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

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**



The screenshot displays a dashboard interface for managing expenses. At the top, it shows 'Total Eligible to Submit: \$251.48'. Below this is a table with columns: DATE, EXPENSE, RECIPIENT/PATIENT, MERCHANT/PROVIDER, SUBMITTED AMOUNT, and STATUS. The table lists several expense entries. The last entry, dated 2/22/2020, is expanded to show 'Expense Details'. A red arrow points from the text 'Remove Expense' in the list to the 'Remove Expense' link in the expanded details view.

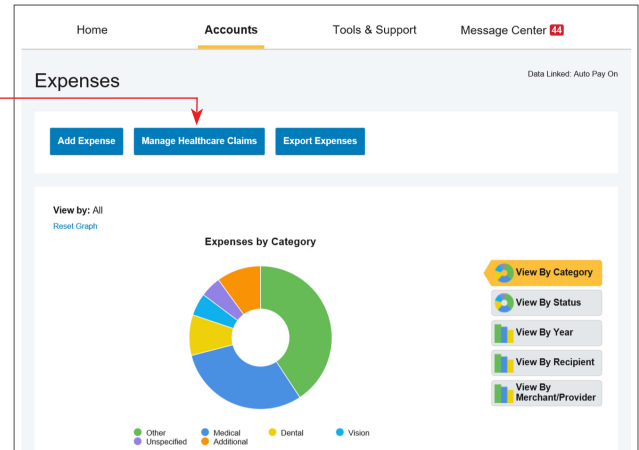
DATE	EXPENSE	RECIPIENT/PATIENT	MERCHANT/PROVIDER	SUBMITTED AMOUNT	STATUS
+ 4/28/2020	Pharmacy	Justine Davis	-	\$20.00	\$
+ 4/3/2020	Other	Justine Davis	Phillips Chiropractic	\$403.62	\$
+ 3/26/2020	Medical	Justine Davis	Dr. Wilson	\$12.00	\$
+ 3/25/2020	Vision	Justine Davis	Dr. Emmie Johnson	\$5.32	\$
+ 3/8/2020	Medical	Justine Davis	Wilson Family Dentistry	\$15.00	\$
+ 3/2/2020	Chiropractic	Kim Davis	Natural Wellness Center	\$20.00	\$
- 2/22/2020	Dental	Justine Davis	Dr. Wilson	\$15.00	\$ Pay

Expense Details	
Description: Dental	Date(s) of Service: 2/22/2020
Source: Mobile	Expense Amount: \$15.00
Received Date: 2/28/2020	Payable Amount: \$15.00

Upload Receipt(s) Add Expense Note Mark as Paid
Remove Expense Update Expense

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.

The screenshot shows the 'Accounts / Claims' page. At the top, there are navigation links for 'Home', 'Accounts', 'Tools & Support', and 'Message Center'. Below these are three buttons: 'Add Expense', 'Manage Healthcare Claims', and 'Export Expenses'. A red arrow points from the 'Manage Healthcare Claims' button to the first step of the text. Below the buttons, there is a 'View by: All' dropdown and a 'Reset Graph' link. The main content is a table titled 'Accounts / Claims' with a 'Filter By' dropdown and a 'Reset Filters' link. The table has five columns: 'DATE OF SERVICE', 'ACCOUNT', 'MERCHANT/PROVIDER', 'CLAIM STATUS', and 'AMOUNT'. The table contains 15 rows of data.

DATE OF SERVICE	ACCOUNT	MERCHANT/PROVIDER	CLAIM STATUS	AMOUNT
07/03/2020	Health Reimbursemen...	McArthur General	PTP Pending Receipt	\$12.35
06/06/2020	Limited Purpose Flexib...	-	Paid	\$10.00
06/02/2020	Health Reimbursemen...	Dr. Smiles	Denied	\$15.55
06/02/2020	Health Reimbursemen...	Brownstone Orthodontic	Paid	\$12.48
05/18/2020	Limited Purpose Flexib...	Dr. Jones	Paid	\$14.93
05/13/2020	Limited Purpose Flexib...	University Dental	Paid	\$26.57
05/09/2020	Limited Purpose Flexib...	Dr. Wilson	Paid	\$29.37
05/02/2020	Health Reimbursemen...	McArthur General	Paid to Provider	\$12.45
05/02/2020	Health Reimbursemen...	Brownstone Orthodontic	Paid	\$12.48
04/28/2020	Health Reimbursemen...	-	Paid	\$20.00
03/26/2020	Limited Purpose Flexib...	Dr. Wilson	Denied	\$12.00
03/25/2020	Health Reimbursemen...	Dr. Emmie Johnson	Denied	\$5.32
03/08/2020	Limited Purpose Flexib...	Wilson Family Dentistry	Denied	\$15.00
03/02/2020	Health Reimbursemen...	Natural Wellness Center	Denied	\$20.00
01/30/2020	Limited Purpose Flexib...	Dr Mark	Denied	\$2.45

Accounts / Payments

Filter By [Reset Filters](#)

DATE	NUMBER	METHOD	STATUS	AMOUNT
+ 07/08/2020	0000080323	Check	Paid	\$12.48
+ 07/01/2020	0000080318	Check	Paid	\$10.00
+ 06/10/2020	0000080314	Check	Paid	\$70.87
+ 06/03/2020	0000080309	Check	Paid	\$12.48
+ 05/20/2020	0000080308	Check	Paid to Provider	\$12.45
+ 05/20/2020	0000080307	Check	Paid	\$20.00
+ 04/17/2020	0000080306	Check	Paid to Provider	\$3.45

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

Banking / Cards

Bank Accounts [Add Bank Account](#)

MY CHECKING
BELL STATE BANK & TRUST
xxxx0454
Checking
[View](#)

Debit Cards

JUSTINE DAVIS
Card Number: xPEND †
Status: Active
Expires: 6/30/2018
Effective: 6/11/2015
[Report Lost/Stolen](#)

† Request New Personal Identification Number (PIN) Toll Free Number: (866) 866-9795

We collect information about your use of this portal (for example, how long you are on the portal, the pages you visit, etc.) so that we can understand and improve user experience. For more information, [click here](#). To opt out of this information collection, [click here](#).

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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

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**

Home Accounts Tools & Support Message Center 2

Profile / Profile Summary

Profile	Update Profile	Dependents
JUSTINE DAVIS ADDRESS 133 Main Street Anytown, NY 10016 United States HOME PHONE (888) 678-9070 MOBILE NUMBER (423) 485-4623 EMAIL ADDRESS jdavis@parklocal.net GENDER Unspecified MARITAL STATUS Unspecified EMPLOYER EMPLOYEE ID 450689962 USERNAME JDavis CONSUMER COMMUNIC... 450689962		KIM DAVIS Birth Date: 7/1/2002 Student: Yes View

Beneficiaries	Add Beneficiary
KIM DAVIS Type: Primary	

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

Contact Us Justine Davis - 0 Logout

Home Accounts Tools & Support Message Center 2

Tools & Support

Documents & Forms	How Do I?
FORMS All About HSA's Automatic Dependent Care Claim Form CDH Quick Start Guide Direct Deposit Authorization Form HSA Tax Documents Sample 1099-SA Sample 5498-SA Terms and Conditions	Change Payment Method Report Card Lost or Stolen Update Notification Preferences Download Mobile App Update HSA Coverage Level Manage Healthcare Claim Data Update Healthcare Savings Goal

Contact Us	Quick Links
Consumer Support 9930 South Holt Street Minneapolis, MN 55410 Phone: (612) 555-5959 Toll Free: (800) 555-5959 Fax: (612) 555-4965 Email: consumersupport@yourCDH.com	FSA RESOURCES Find FSA Eligible Items on FSA Store FSA Store Eligibility FSA Store Learning Center IRS PLAN RESOURCES FSA IRS Publications OTHER RESOURCES Health Shopper WebMD QUICK LINKS GoodRx Healthcare Trends Institute

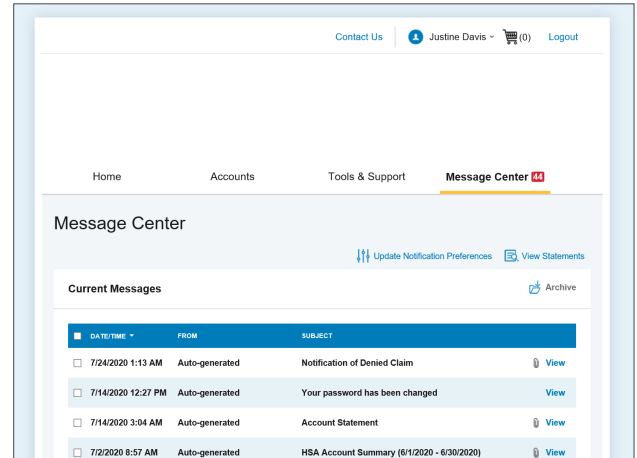
Other available information

DOCUMENTS & FORMS

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

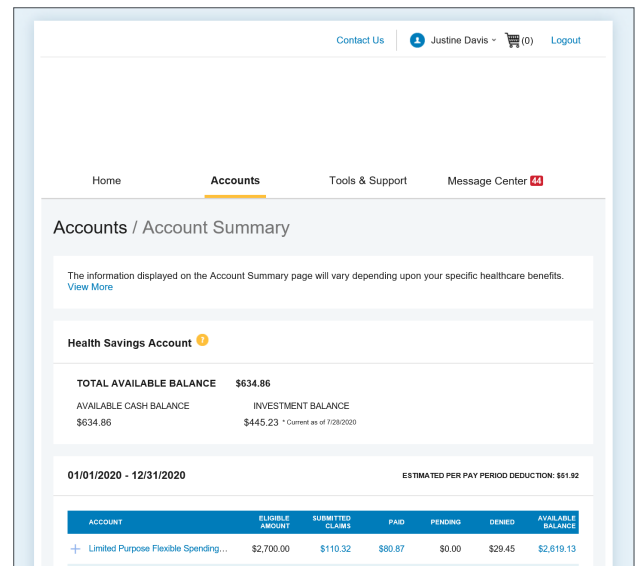
NOTIFICATIONS

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.



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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