

# Welcome to My RxBenefits Book

A streamlined portal designed just for benefits advisors, offering real-time, 24/7 access to your clients' essential pharmacy benefits information.



This quick start guide will help you familiarize yourself with the portal's key features and maximize its benefits.

## Key Features\*



### Reports:

Configure, save, share, and schedule a variety of reports.\*\*



### Comprehensive data management:

Access client data and edit member details.



### Invoices:

Obtain individual, consolidated client invoices.



### Secure file access:

Receive and retrieve important files quickly and securely.

*\*Access to specific features is dependent on your user role and permissions.*

*\*\*Benefits advisors accustomed to receiving emailed pharmacy dashboard reports (via DataNet) will automatically receive scheduled reports at the same cadence through the My RxBenefits Book portal. You must be a registered user to retrieve the reports.*

## Password-less Login

To keep your sensitive information secure, the portal uses password-less authentication with a one-time passcode for each login. Here's how it works:

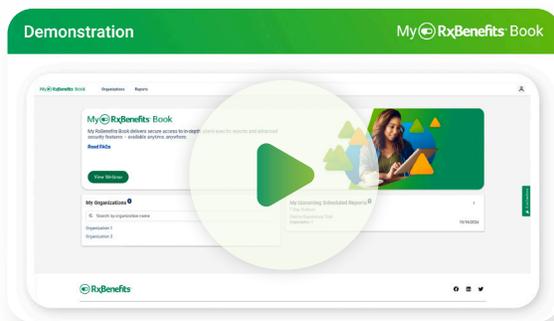
- 1 Once your Account Manager sets up your account, you'll receive a welcome email.
- 2 Click the link in the email to access the login page or visit [www.RxBenefits.com](http://www.RxBenefits.com) and navigate to the login page.
- 3 Enter your company email address used during account setup.
- 4 You'll receive a one-time passcode via email to access the portal. This passcode expires after a single use or 15 minutes. Each time you log in, you'll follow this process for secure access.

## Accessing Reports

With My RxBenefits Book, you can configure, generate, share, and schedule various reports, including claims, utilization, stop loss, and more. If you have access to the Reports feature, follow these steps:

- 1 Click on the **Reports** header to access the catalog and browse all available reports.
- 2 Choose a report and **set up parameters** such as organization, dates of service, and other criteria.
- 3 Preview the report to confirm your selections before generating. Once satisfied, click **Generate Report**. The report will then appear in your **My Downloads** section for easy access.
- 4 Use the **Action** menu to save frequently used reports as favorites. In your **Favorites** section, you can schedule these reports for regular distribution to other users with access.

## Additional Resources



[On-Demand Video Tutorial](#)



[Frequently Asked Questions](#)



We're here to support you every step of the way as you explore the capabilities of My RxBenefits Book.

**Need help?** Contact your Account Manager for account setup or additional support.