



a WEX™ company



BPC Wealthcare Portal

Simplify your healthcare finances with convenient, online access to your tax-advantaged benefit account

Contents

Getting started	2
Registration	2
Secure authentication	2
Your first login	3
Checking your account balance(s)	4
Submitting expenses and filing claims	4
Submitting a claim	5
Viewing claims and expenses	6
Resolving pending debit card transactions	7
Updating your user profile	7
Managing alerts & messages	8
Changing your alert preferences	9

Getting started

The BPC Wealthcare Portal can be accessed by visiting the following URL:

- <https://bpc.wealthcareportal.com>

Registration

- **Step 1:** If this is your first time accessing BPC Wealthcare Portal, click the *register* button atop the right corner of the home screen.
- **Step 2:** Complete the registration form (as shown in the image on the lower right).
 - Choose a username & password
 - Enter your demographic information
 - Obtain your *employee ID* and *employer ID* from <https://register.bpcinc.com>.

If you already have a benefit debit card, the debit card number can be used in place of the *employer ID* in the *registration ID* field.

Before clicking *register*, be sure to view and accept the terms of use.

- **Step 3:** Click *register*. The process may take a few seconds. Do not click your browser's back button or refresh the page.

Secure authentication

The next phase of registration involves setting up your secure authentication. This crucial step helps ensure your account is secure and private.

After the registration form is successfully completed, you will be prompted to complete the secure authentication setup process.

- **Step 1.** Select your security questions. From the list, please select four security questions and provide your answers. These questions will be randomly asked during subsequent logins to ensure security. When finished, click *next*.
- **Step 2.** Verify your email address.

On the next page, you will be prompted to verify your email. Click *next*.

Register - Secure Authentication

STEP 1 STEP 2 **STEP 3** STEP 4

First Name Test

Last Name Account

Confirm Email *

i The email address entered is used for security encryption only. It is not used for solicitation purposes.

- **Step 3.** Submit setup information. On the next page, you'll be asked to verify the information you entered during the secure authentication process. After you've reviewed and confirmed the accuracy of this information, click *submit setup information*.

A confirmation page will display the successful completion of your registration.

Your first login

Once registered, you will be able to enter your username, answer security questions, and enter your password on all subsequent login attempts.

Checking your account balance(s)

Navigate to the *benefit account summary* page to access a quick view of your account balance(s). Each of your accounts displays in its own box, and provides at-a-glance details regarding your balance, funds spent, and important dates.

The screenshot shows the 'Flexible Spending Account' summary for the period 01/01/2016-12/31/2016. It includes a donut chart for the account balance, a table for the account summary, and a section for deadlines. Three callout boxes provide additional context:

- Account Balance:** A donut chart shows the total balance of \$1,456.00. The available balance is \$589.49 (red segment), and the amount spent is \$866.51 (blue segment).
- Account Summary:** A table provides a breakdown of the account's activity:

Annual Election	\$1,456. ⁰⁰
Payroll Deposits YTD	\$1,568. ⁹⁹
Spent	(\$866. ⁵¹)
Balance	\$589. ⁴⁹
- Deadlines:** A section lists key dates:

Plan Start	Jan 1, 2016
Plan End	Dec 31, 2016
Last Day to Submit Claims	Mar 31, 2017
Last Day for Spending	Dec 31, 2016

At the bottom, there are three buttons: 'VIEW DETAILS', 'TRANSACTIONS', and 'SUBMIT CLAIM'. The callouts explain that the donut chart shows the annual election spent vs. available, the summary table shows important dates, and the buttons link to additional details, transactions, and claim submission forms.

Submitting expenses and filing claims

BPC Wealthcare Portal allows you to enter new claims and expenses, as well as view and edit pending claims. If you have receipts or documentation to substantiate your claim, you can attach these to expedite the reimbursement process.

What is the difference between a claim and expense?

- **Claim.** Claims are simply reimbursement requests submitted for costs incurred when receiving eligible services, products, or procedures.
- **Expense.** Expenses are used to track & manage your medical, dental, vision, prescription, and other potentially eligible expenses. Once entered, expenses can be submitted for reimbursement (just like a claim). Expenses can be submitted at your convenience.

The screenshot shows the 'Personal Dashboard' with a navigation menu at the top containing 'My Accounts', 'Claims', and 'Resources'. The 'Claims' dropdown menu is open, showing options: 'View Claims List', 'Submit Claim', and 'Add Expense for Future Payment'. The 'Submit Claim' option is highlighted with an orange box. Below the dashboard, there is a section for 'Your Account' with a 'Plan years to show:' dropdown set to 'Current'.

Submitting a claim

To enter a claim and request reimbursement, navigate to the *add claim* page (by clicking *submit claim* or via the menu bar) and complete the form. Be sure to upload a receipt image if you have one. You can click *browse* to navigate to the file, or you can drag and drop from your computer. Click *submit* to send the request for processing.

The screenshot shows the 'Add Claim' form with the following fields and options:

- * - Required Field**
- Claimant**: Steve Sample (dropdown)
- Reimbursement Method**: Card (dropdown)
- Service Start Date ***: select date (calendar icon)
- Service End Date ***: select date (calendar icon)
- Service Type ***: -- Select One -- (dropdown)
- Claim Amount ***: \$ 0.00 (text input)
- Would you like to submit this as a recurring payment?**: Yes (checked) / No (selected)
- Provider Name**: (text input)
- Comments**: (text area)
- Upload Receipt ***: (text input) **BROWSE** (button)
- DRAG & DROP** your receipts here (instructions with icon)
- SUBMIT** (button) **CANCEL** (button)

Viewing claims and expenses

Once entered, claims and expenses can be viewed on the *claims list* page. From here, you can view claim status, attach receipts, and request reimbursement for eligible expenses.

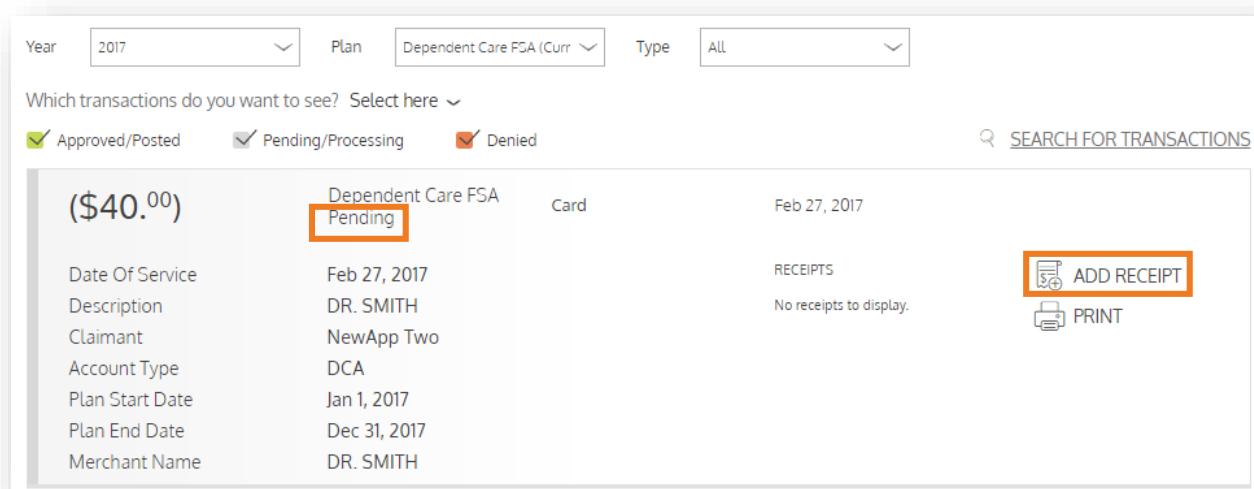
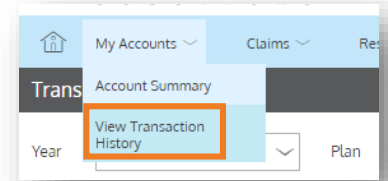
Action Needed		
\$100. ⁰⁰	Eligible for Reimbursement	Claim Date of Service: Oct 26, 2016 REQUEST REIMBURSEMENT
Approved/Paid/Submitted		
(\$32. ⁹⁹)	Paid	Claim Date of Service: Nov 4, 2016 Date of Transaction: Nov 9, 2016
(\$43. ⁹⁹)	Paid	Claim Date of Service: Nov 3, 2016 Date of Transaction: Nov 9, 2016
(\$54. ⁰⁰)	Paid	Claim Date of Service: Nov 9, 2016 Date of Transaction: Nov 9, 2016
(\$8. ⁰⁰)	Paid	Claim Date of Service: Nov 7, 2016 Date of Transaction: Nov 9, 2016
\$100. ⁰⁰	Submitted	Claim Date of Service: Oct 26, 2016 ADD RECEIPT
< Page 1 of 1 >		
Denied		
\$34. ⁰⁰	Denied	Claim Date of Service: Nov 9, 2016 Date of Transaction: Nov 9, 2016

Resolving pending debit card transactions

If you swipe your debit card for eligible products or services, you may be required to submit a receipt or other documentation before the debit card transaction can be approved. To aid in resolving pending debit card transactions, you can take the following action:

- **Step 1.** Navigate to the *transactions* page.
- **Step 2.** Located the pending transaction (using the search filters)
- **Step 3.** Click to expand the transaction, and click *add receipt* to attach your supporting documentation to the transaction.

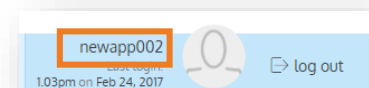
We will review the documentation you've submitted and update the transaction accordingly.



Updating your user profile

To access and edit your user profile, click the username hyperlink on the right side of the navigation bar. From this page, you can:

1. Update your phone number and address
2. Change your password
3. Update your reimbursement method
4. Add a new dependent
5. Update or remove an existing dependent



The image below shows where each item in the list above is located.

User Profile: NewApp Two

Date of Birth: Jan 1, 1950
Employee ID: *****P002
Marital Status: None
Gender: None

Contact Information:
Phone: 555-444-1234
Email Address: [edit](#) [delete](#)
hjones@alegeus.com

Addresses:
Address: 1 Main Street, Beverly, MA, 00000, US
Alternate Address: 40 Elm St, Orlando, FL, 32801, US

Employer: New Mobile App One
SSN: XXX-XX-5678
Employee Status: New

Reimbursement Method: Direct Deposit
Eastern Bank
Account Number: ****2356
Routing Number: ****1798
Checking

Family Members:

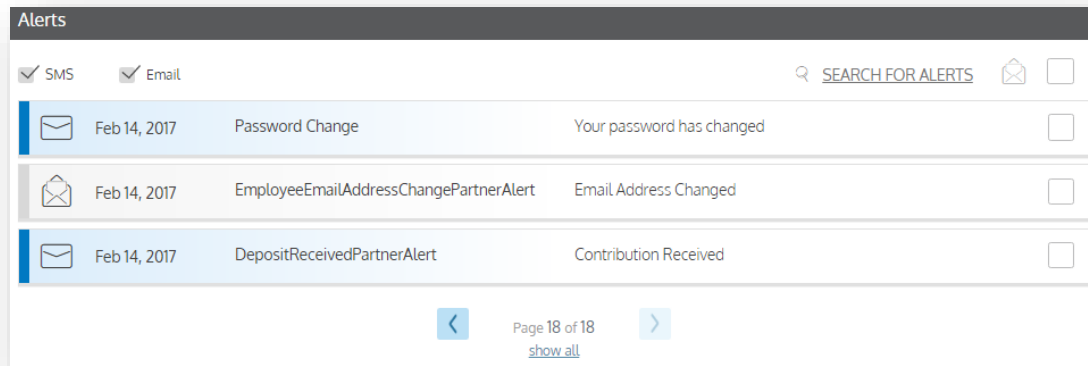
Spouse: NewApp Two (Spouse Or Common Law Spouse)

Date of Birth: Mar 3, 1975
SSN: *****1555
Address: 1 Main Street, Beverly, 00000, US
Gender: [Redacted]
Phone: [Redacted]

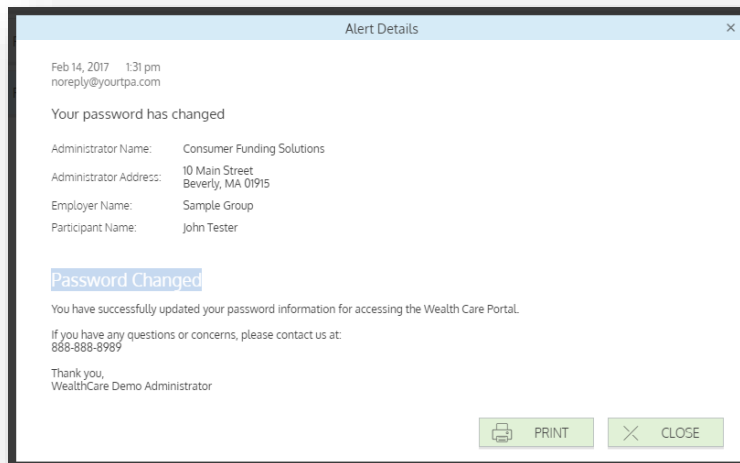
Managing alerts & messages

The bell icon in the navigation bar indicates when you have unread alerts awaiting your review. Depending on your communication preferences and your group's setup, these alerts could be anything from confirmation of an email address or password change, to notification that a claim you submitted has been received, to an alert that a card transaction was denied, to a wide variety of other communication types.





Click on an individual message to see the full text:



Changing your alert preferences

You can change whether you receive certain alert types, as well as how you receive them from the *communication settings* page. This page can be accessed by clicking the sprocket symbol in the navigation bar.

You may choose, for each alert type, whether you receive it via mobile, email, both, or neither. Click *save* when you are done editing your preferences. You can also use this page to update your email address, and to register your mobile phone for SMS text alerts.



Assigned Notifications

The notifications below are available to you. Please define the delivery method for these notifications. If mobile number and/or email is not an available delivery method, please **make sure you have an active email address and registered mobile number** listed on the right.

	mobile	email	both	none
Account Balance Alert	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Account Deductible Met	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Billing Address Change	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Card Mailed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Card Transaction Approved	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Card Transaction Denied	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Completed HSA Payment Notice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Deposit Received	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enrollee Welcome Email	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Failed HSA Payment Notice	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Manual Claim Entered	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Password Change	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Year End Reminder	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Email Address

email@email.com

Phone Registration Status

11234567891 Pending

You will receive a text to the number shown above asking you to complete the registration process. Once registered, your phone's status will show as Registered instead of Pending. If your number remains in Pending status or if you never receive the registration text, please contact support for assistance in resolving the issue. Once registered, text BAL to 97487 to receive your current year account balances. You can opt-out at anytime by texting STOP. For help with text commands, please text HELP to 97487.

The envelope icon in the navigation bar indicates when you have unread messages awaiting review. These messages include copies of manual claim letters, receipt notification letters, and reimbursement letters. Similar to alerts, you can simply click any message item to see the letter text in full.



Messages

Unread Read SEARCH FOR MESSAGES

<input type="checkbox"/>	May 1, 2018	Pending Letter	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Apr 17, 2018	Pending Letter	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Apr 17, 2018	Denial Letter	<input type="checkbox"/>

Page 1 of 1