

isolved Benefit Services provides all participants with an online portal that provides anytime access to view and manage account information. One of the many features available is the capability to review your account.

Account Balance

To view your balance, follow these steps:

1. Navigate to the [isolved Benefit Services login page](#).

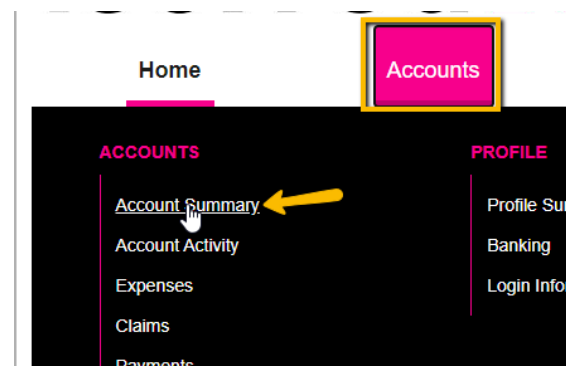
For security purposes, it is important for you to login to setup your Username and Password. isolved Benefit Services provides you with a 120-day timeframe to access your account to assist with the security of your account. If you access your account after the 120-day timeframe, you will need to contact isolved Benefit Services to receive a temporary password.

The screenshot shows a login form with the following elements: a 'Username' input field with a 'Forgot Username?' link to its right; a 'Password' input field with a toggle eye icon and a 'Forgot Password?' link to its right; a 'Remember Me' checkbox; and a pink 'Login' button at the bottom.

- Step 2:** Enter your Username and Password. First time users, please refer to [How to Login.pdf](#).

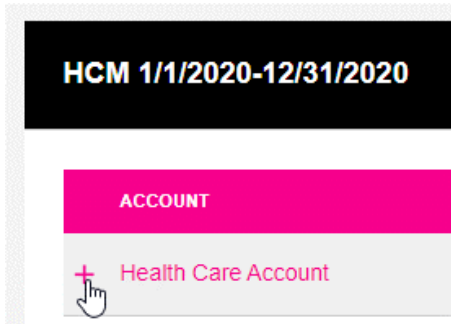
3. On the **Home Page**, under **Accounts** is the available amount for your account.

Accounts	
HCM 1/1/2020-12/31/2020	
	AVAILABLE
Health Care Account ?	\$208.26



To review an Account Summary of your account(s) that includes current account balance(s), from the top menu click on **Accounts, Account Summary**, in the drop-down menu.

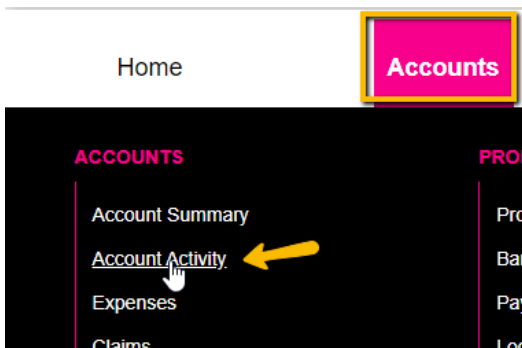
If you click on the “+” next to the Plan, it will provide you with your plan summary.



HCM 1/1/2020-12/31/2020						
ACCOUNT	ELIGIBLE AMOUNT	SUBMITTED CLAIMS	PAID	PENDING	DENIED	AVAILABLE BALANCE
— Health Care Account	\$1,831.57	\$1,623.31	\$1,623.31	\$0.00	\$0.00	\$208.26
Election Details	Effective: 1/1/2020 My Annual Election: \$1,800.00 Company Contribution to Date: \$0.00		My Contributions to Date: \$1,575.00 Plan Year Balance: \$208.26			

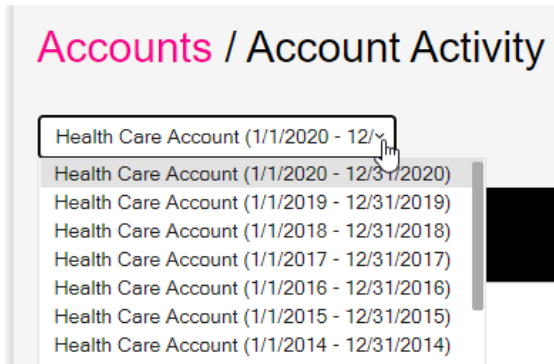
The Account Summary page provides you with balance details for the plans you have elected. This page displays all plan years you have been enrolled in by plan year name. If no plans are available, the system will display the message “No accounts available”. Plan years are collapsed but can be expanded to see the details.

Account Activity



This page will provide you with your transaction summaries including pending and processed transactions.

First, chose the Account you want to view from the drop-down menu.



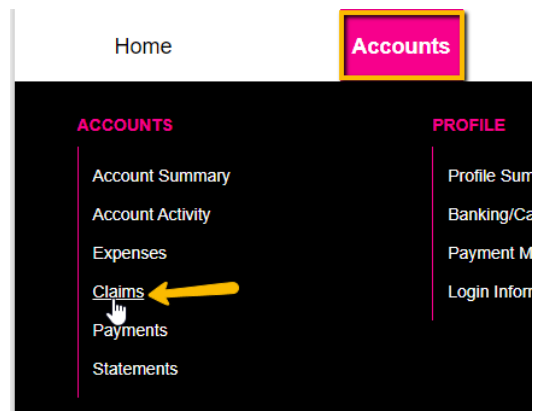
Activity Details Export

DATE	DESCRIPTION	AMOUNT	RUNNING BALANCE	NOTES
11/06/2020	Payroll Deduction *	\$75.00	\$208.26	
10/23/2020	Payroll Deduction *	\$75.00	\$208.26	
10/09/2020	Claim Submission	-\$26.89	\$208.26	

Claims

The Claims page provides you with a complete view of all your claims from all account(s) on one page. The page displays your account, claim status, receipt status, claim summary level and details of your claim. Click on any claim to view details.

To view your claims, either click on your account from the **Home Page** or click on **Accounts, Claims**.



Accounts / Claims

Filter By Reset Filters

DATE OF SERVICE	ACCOUNT	MERCHANT/PROVIDER	CLAIM STATUS	AMOUNT
10/07/2020	Health Care Account	CVS/PHARMACY #06181	Paid	\$26.89
<p>Claim Details</p> <p>Claim Number: 2800A201009D0000101 Date(s) of Service: 10/07/2020</p> <p>Recipient: John Doe Paid: \$26.89</p> <p>Payee: John Doe</p> <p>Source: Debit Card</p> <p>Receipt Status: Not Needed</p>				

This will show you claims you have submitted. Click on the “plus” to view details on a claim.

You can also filter your claims by:

- Account
- Claim Status
- Receipt Status

Filter By Reset Filters

Account

- All Accounts
- 01/01/2020 - 12/31/2020
Health Care Account
- 01/01/2019 - 12/31/2019
Health Care Account
- 01/01/2018 - 12/31/2018
Health Care Account

Claim Status

- All Claim Statuses
- Paid

Receipt Status

- All Receipt Statuses
- Not Needed
- Received

Filter By Reset Filters

DATE OF SERVICE	ACCOUNT	MERCHANT/PROVIDER	CLAIM STATUS	AMOUNT
07/01/2020	Health Care Account	-	Pending Reimbursement	\$180.00
<p>Claim Details</p> <p>Claim Number: ABC123201116C0000101 Date(s) of Service: 07/01/2020</p> <p>Recipient: John Doe Pending: \$145.00</p> <p>Payee: John Doe Denied: \$35.00</p> <p>Source: Administrator</p> <p>Receipt Status: New Needed</p> <p>View Confirmation</p>				

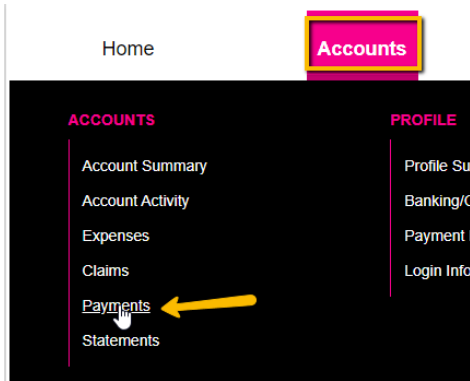
Note: If you click on “**New Needed**” under **All Receipt Statuses** then you will be taken to any claims that require a receipt. You can also view any receipt reminders under the **Message Center**.

Payments

To view Payments, click on **Accounts, Payments** from the top menu.

The Payments page provides you with a complete view of all payment details on one page. This page will display when a payment when:

- Claims are posted for reimbursements
- Debit Card transactions are settled
- There are refunds from a Debit Card transaction



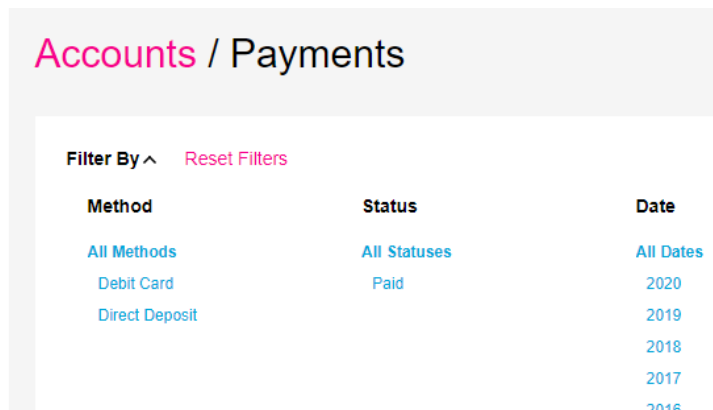
If there is no payment the message will displays as “There are no records to display”.

To view details, click on the “plus” beside the payment.

DATE	NUMBER	METHOD	STATUS	AMOUNT
10/08/2020	65223380	Debit Card	Paid	\$26.89

Payment Details	Account: Health Care Account	Date of Service: 10/07/2020
	Recipient: John Doe	Claim Amount: \$26.89
	Merchant/Provider: CVS/PHARMACY	Payment Amount: \$26.89
	Type: Claim Reimbursement	

Total Payment Amount: \$26.89



You can also filter your payments by:

- **Method**
- **Status**
- **Date**

Remember, you can now **go mobile** by using your smart phone to access:

- FSA Account balances
- Submit claims for reimbursement
- Send receipts using a mobile device’s camera
- Configure alerts via text message

Easily check information now using an iPhone, iPod Touch, iPad or Android-powered device.