

# WEX BENEFITS CONSUMER MOBILE APP QUICKSTART GUIDE



## SOUTHERN CALIFORNIA PIPE TRADES HEALTH & WELFARE FUND Health Reimbursement Arrangement (HRA)

Welcome to your SCPT Health & Welfare Fund HRA Benefit Accounts Mobile App. This one-stop app gives you 24/7 access to view information and manage your Health Reimbursement Account (HRA). It enables you to:

- File a claim online
- Upload receipts and track expenses
- View account balance
- Review 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
- Download plan information, forms, and notifications

Your mobile app is designed to be easy to use and convenient.

## HOW DO I ACCESS THE APP?

1. Go to the google play or Apple store and search for SCPT H&W Fund HRA Benefit
2. Download the app and tap on the icon to open it.

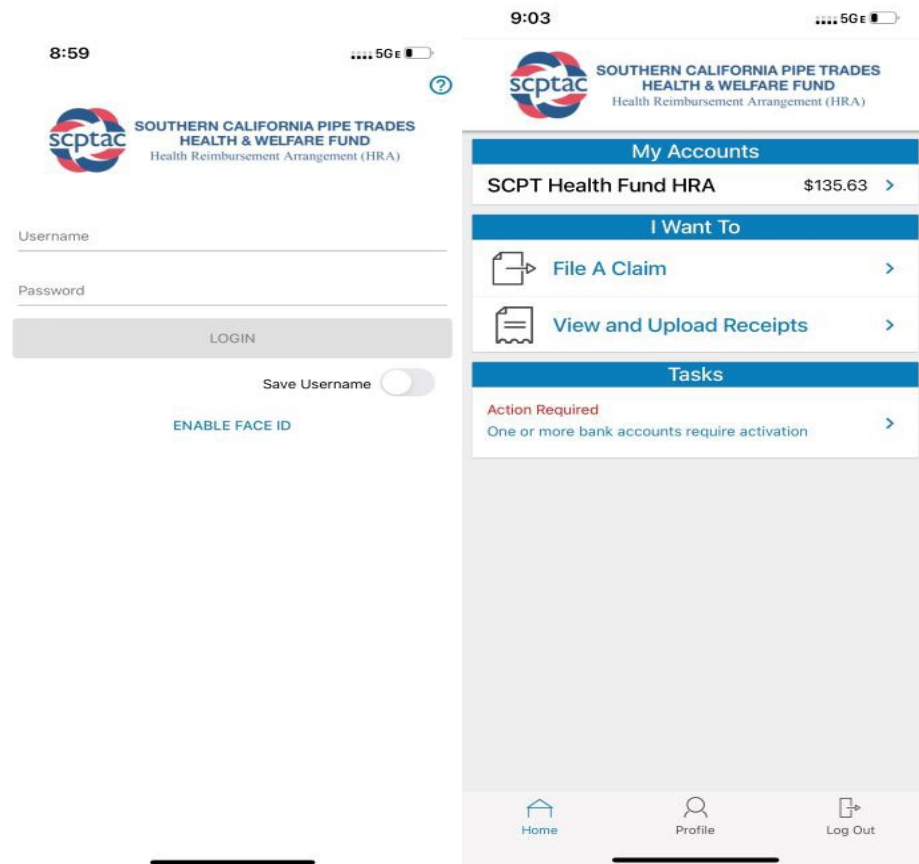


## HOW DO I LOG IN TO THE HOME PAGE?

1. Tap on the app icon.
2. Username is the participant's first initial, last name, zip code, plus 0000 (no spaces).
3. Password is the participant's first initial, last name and last four digits of SSN (no spaces).
4. Click **Login**.
5. Once logged in, it is recommended that the participant change his/her username and/or password.

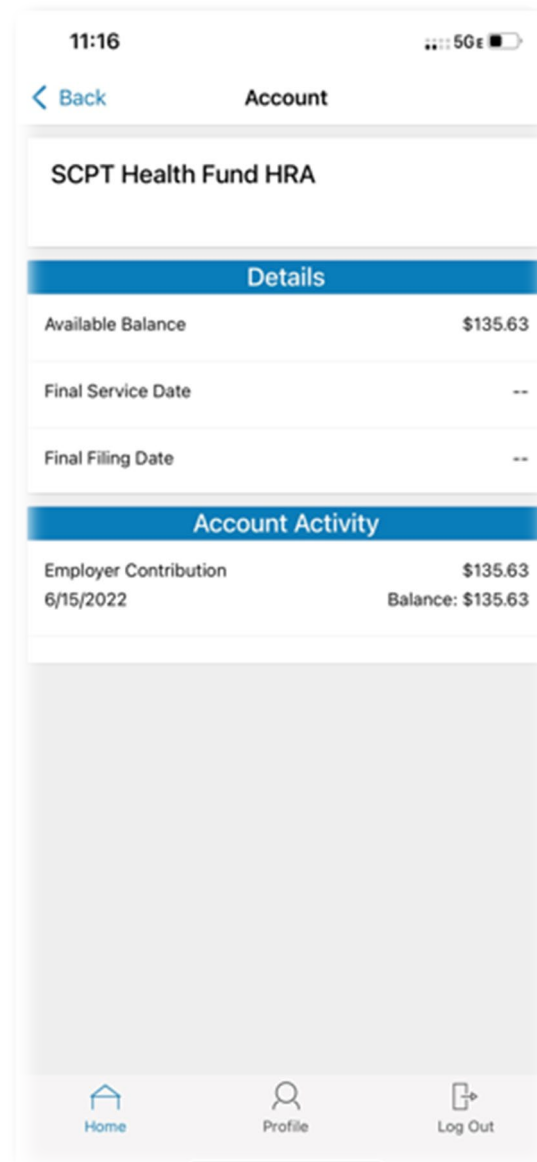
The **Home Page** is easy to navigate:

- Easily access the **Available Balance** and **"I Want To"** sections to work with your accounts right away.
- The **My Accounts** section links to your Accounts, Investments, and Profile.
- The **I Want To** section contains the most frequently used features for the consumer.
- The **Tasks** section displays alerts and relevant links that enable you to keep current on your accounts.



## HOW DO I VIEW CURRENT ACCOUNT BALANCES AND ACTIVITY?

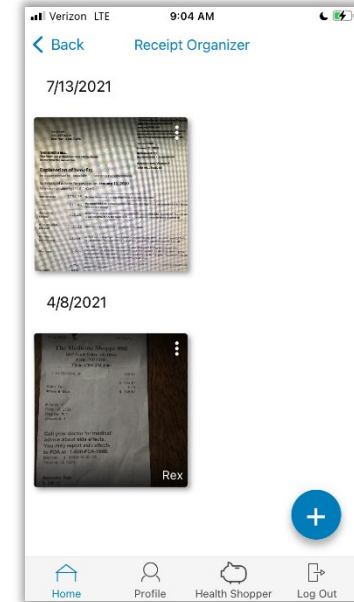
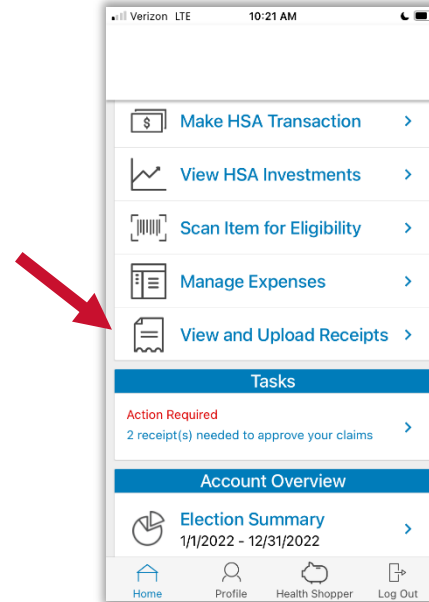
1. The **My Accounts** section shows your current balance.
2. Tap on the plan name to see additional details include account activity.



## HOW DO I ADD A RECEIPT ON THE GO?

Use the **Receipt Organizer** to add and organize receipts on the go.

1. Tap on View and Upload Receipts under the “I Want To” section.
2. Use the + icon to upload a receipt from your photos or to take a picture of your receipt with your camera.
3. Tap the three dots on the upper right side of each image to:
  - View the receipt
  - Remove the image
  - Add or edit the label

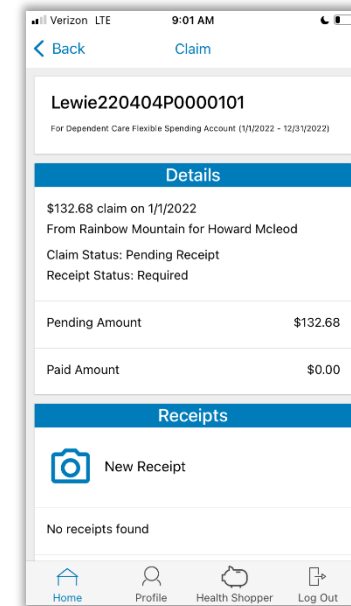
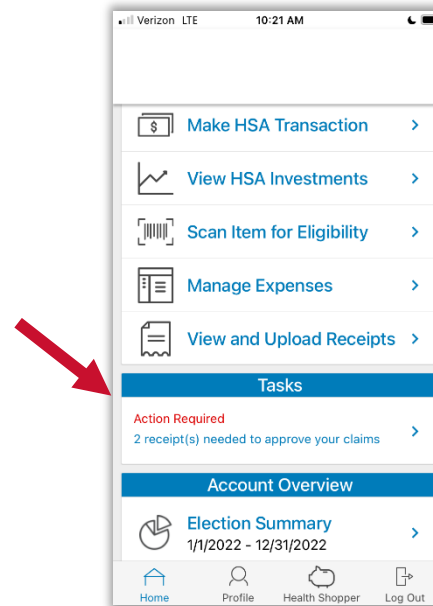


## HOW DO I UPLOAD A RECEIPT FOR A DEBIT CARD CLAIM?

The tasks section updates in real time with receipts needed notifications when you use your debit card.

Simply,

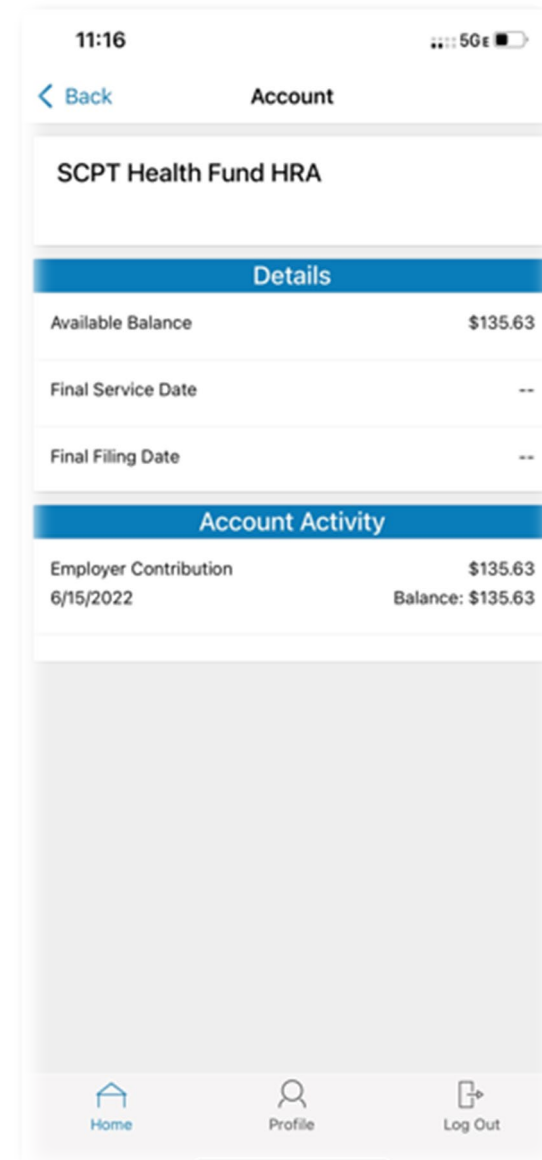
1. Tap on the “Action Required” task.
2. Tap on the claim you have a receipt for.
3. Tap on “New Receipt” to:
  - Add an image from your Receipt Organizer
  - Use your camera to take a picture, or
  - Choose a picture from your photo album



## HOW DO I VIEW MY CLAIMS HISTORY AND STATUS?

1. From the **Home Page**, tap on the plan name to see your claims history.
2. By tapping on the line of the claim, you can expand the data to display additional claim details.

**Did you Know?** For an alternative perspective, you may also view claims history and status for all claim on the **Expense Manager** page.



## HOW DO I REPORT A DEBIT CARD MISSING AND/OR REQUEST A NEW CARD?

1. From any page, tap on the Profile icon.
2. Tap on Manage Debit Cards to put a debit card on hold or report it lost or stolen.

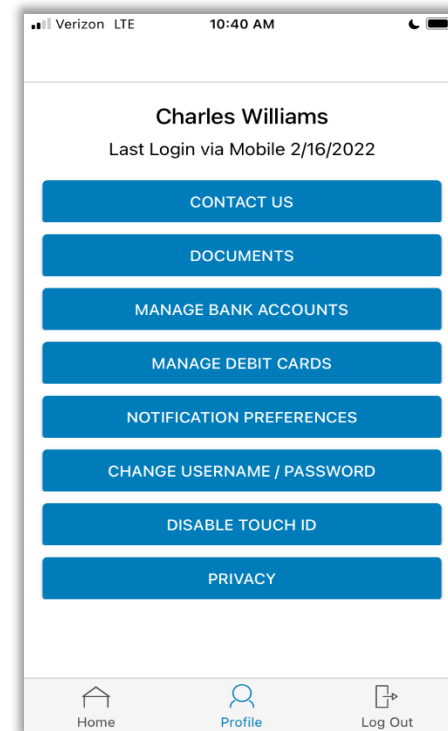
## HOW DO I GET MY REIMBURSEMENT FASTER?

The fastest way to get your money is to sign up online for direct deposit to your personal checking account. Before you begin, make sure that 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 **Update** for the appropriate plans. Update the secondary reimbursement method to **Direct Deposit**.
3. Enter your bank account information and click **Submit**.
4. The **Payment Method Changed** confirmation displays.
5. 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.

## HOW DO I CHANGE MY LOGIN AND/OR PASSWORD?

1. From any page, tap on the **Profile** icon, and tap **Change Username/Password**.
2. Follow instructions on the screen.
3. Tap **Save**.



## HOW DO I VIEW OR ACCESS:

### ...DOCUMENTS & FORMS?

1. From any page, tap on the **Profile** icon.
2. Tap **Documents** tap on the form or document of your choice.

### ...NOTIFICATIONS?

1. From any page, tap on the **Profile** icon.
2. Tap on **Notification Preferences**.
3. Tap on any notification or document as well as adjust notification preferences.