

# Guide to the Consumer Portal



**BENEFITS  
MADE EASY**

## Welcome to Discovery Benefits!

To access your consumer portal, go to our website at [www.DiscoveryBenefits.com](http://www.DiscoveryBenefits.com). From there, click the Login button in the upper right-hand corner of the screen.



EMPLOYEES ▾

EMPLOYERS ▾

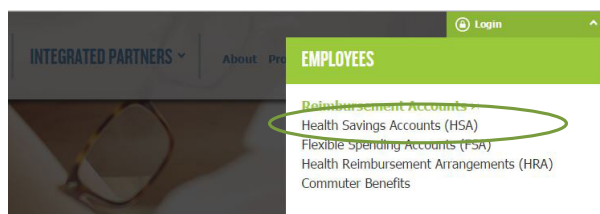
INTEGRATED PARTNERS ▾

About Products Careers Contact

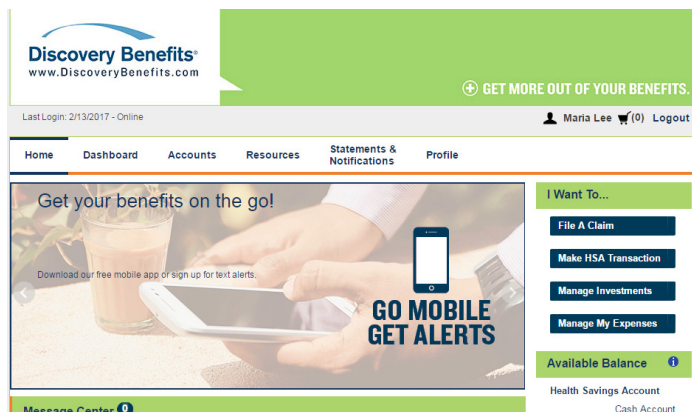
Login ▾

Search

From the drop-down, click on “Reimbursement Accounts.”



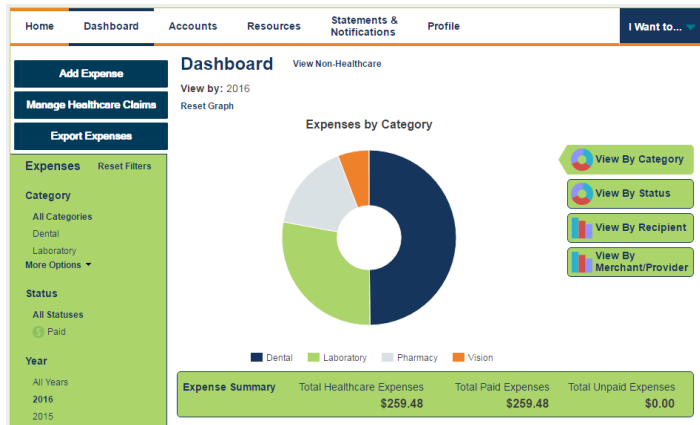
After logging in to your consumer portal, here's what you'll see on your homepage. From this page, you can see your balance, read quick updates on new features or tools in the site banners or view any actions needed from you in the message center.



# Guide to Consumer Portal, continued

The Dashboard tab is where you can access real-time data about recent healthcare expenses. The expenses can be sorted by category, status, recipient or provider to get better insight into where the benefit dollars are being allocated.

The Dashboard tab is also where you can add expenses and upload supporting documentation. By clicking the “Add Expense” button, the expense gets added to the expense tracker, so when you return to the dashboard, you can hit the “Pay” button and begin the filing process without having to fill out any more information. You can also speed up this process by syncing claims from insurance carriers so they filter directly into this dashboard page by setting up Consumer Claims Sync.



The Accounts tab offers the ability to view account summary details, view claim details on the Dashboard, review payment history information and election/plan description details. If you're enrolled in an HSA, this is also where you can go to make investment selections.

The screenshot shows the Accounts tab with a navigation menu and an "I Want to..." dropdown. The main content area is titled "Accounts / Account Summary" and includes a "Health Savings Account" section with a table for "Available Cash Balance", "Investment Balance", and "Total Available Balance". Below this is a table for "HSA Contributions By Tax Year":

01/01/2017-12/31/2017	Estimated Per Pay Period Deduction: \$90.34														
<table border="1"> <thead> <tr> <th>Account</th> <th>Eligible Amount</th> <th>Submitted Claims</th> <th>Paid</th> <th>Pending</th> <th>Denied</th> <th>Available Balance</th> </tr> </thead> <tbody> <tr> <td>Limited Medical FSA</td> <td>\$2,200.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$2,200.00</td> </tr> </tbody> </table>	Account	Eligible Amount	Submitted Claims	Paid	Pending	Denied	Available Balance	Limited Medical FSA	\$2,200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,200.00	
Account	Eligible Amount	Submitted Claims	Paid	Pending	Denied	Available Balance									
Limited Medical FSA	\$2,200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,200.00									

The Resources tab is where you can find applicable forms and links as well as guides and videos related to your account.

The screenshot shows the Resources tab with a navigation menu and an "I Want to..." dropdown. The main content area is titled "Resources / Guides & Videos" and includes a "Tools & Support" section and a "Videos" section with a list of video titles. There is also a "Guides" section with a list of guide titles and a "FAQs" section with a list of FAQ titles.

The Statements & Notifications tab stores reminders like account statements, receipt reminders, advice of deposits and HSA tax documents (if applicable). It's also where you can go to update your notification preferences to opt in or out of certain text and email alerts.

The screenshot shows the Statements & Notifications tab with a navigation menu and an "I Want to..." dropdown. The main content area is titled "Statements & Notifications" and includes two sections: "Statements" and "Notifications". Both sections have a message: "No statements are available at this time." and "No notifications are available at this time." respectively.

The Profile tab offers the ability to review personal demographic information, add dependents, direct deposit information, order additional or replacement debit cards (if applicable to the plan design) and update login information.

The screenshot shows the Profile tab with a navigation menu and an "I Want to..." dropdown. The main content area is titled "Profile / Profile Summary" and includes a table with profile information:

Profile	Update Profile	Dependents	Add Dependent									
<table border="1"> <thead> <tr> <th>Banking/Cards</th> <th>Payment Method</th> <th>Login Information</th> </tr> </thead> <tbody> <tr> <td></td> <td>                     Maria Lee                      Address                      4321 20th Ave SW                      Fargo, ND 58103                      United States                 </td> <td></td> </tr> </tbody> </table>	Banking/Cards	Payment Method	Login Information		Maria Lee Address 4321 20th Ave SW Fargo, ND 58103 United States			<table border="1"> <thead> <tr> <th>View / Update</th> <th>View / Update</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> </tr> </tbody> </table>	View / Update	View / Update		
Banking/Cards	Payment Method	Login Information										
	Maria Lee Address 4321 20th Ave SW Fargo, ND 58103 United States											
View / Update	View / Update											

The “I Want To...” menu, which is visible from every page of the portal, is where you can access quick buttons for the most common actions on your account, including filing a claim, making an HSA transaction and managing investments and expenses.